



## C2M v2.9

### 4.1.1.1 Manage Adjustment and Adjustment Approval

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## Brief Description

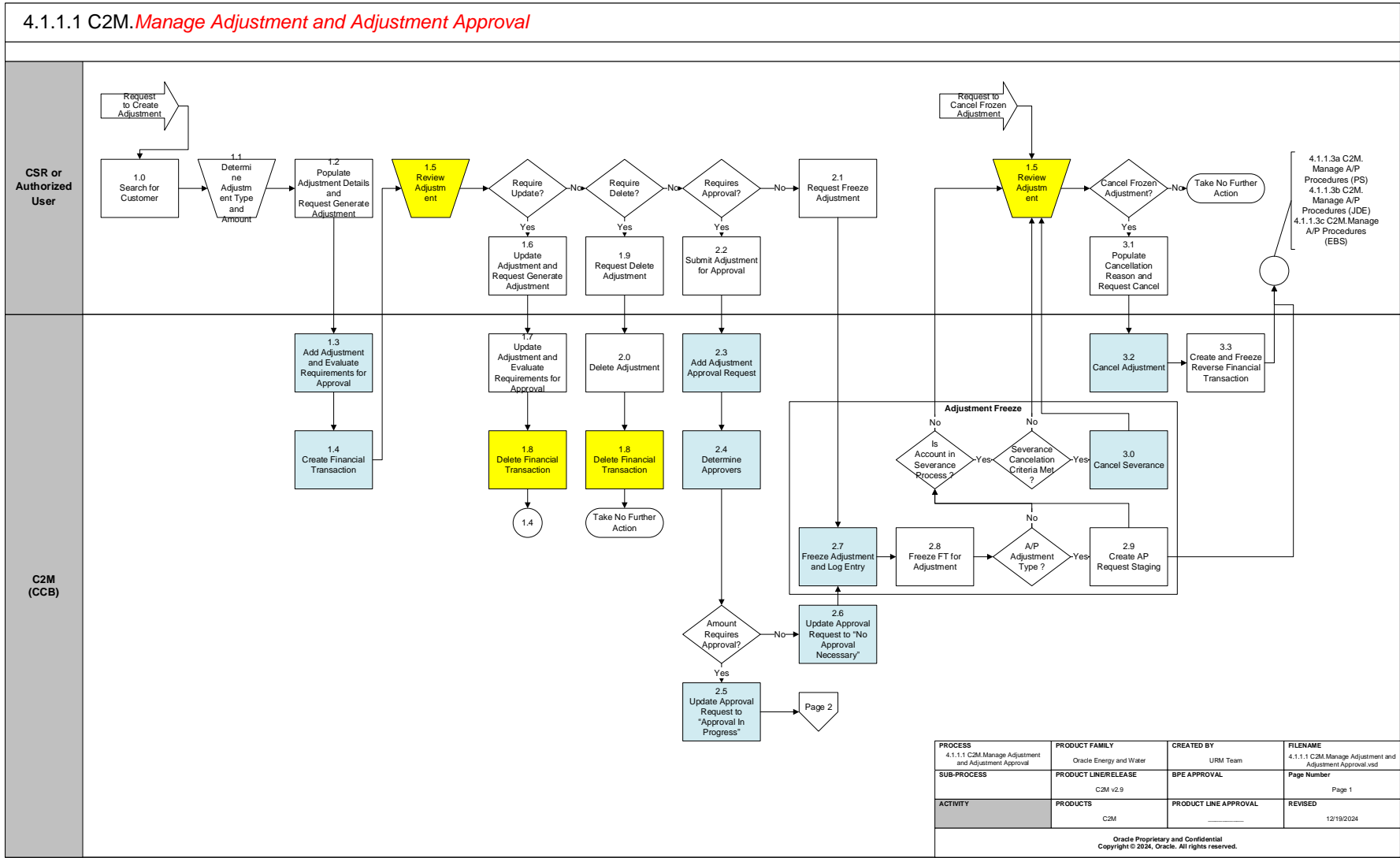
**Business Process:** 4.1.1.1 C2M.Manage Adjustment and Adjustment Approval  
**Process Type:** Sub Process  
**Parent Process:** 4.1.1 C2M.Create Adjustment  
**Sibling Processes:**

This document describes the Adjustment and Adjustment approval process. An adjustment is used to change the amount of debt stored on a service agreement. Some adjustments need to be approved by one or more managers before they impact a customer's debt and the general ledger. This model reflects the [Adjustment Approval lifecycle](#), and incorporates the logic and sequence of business events.

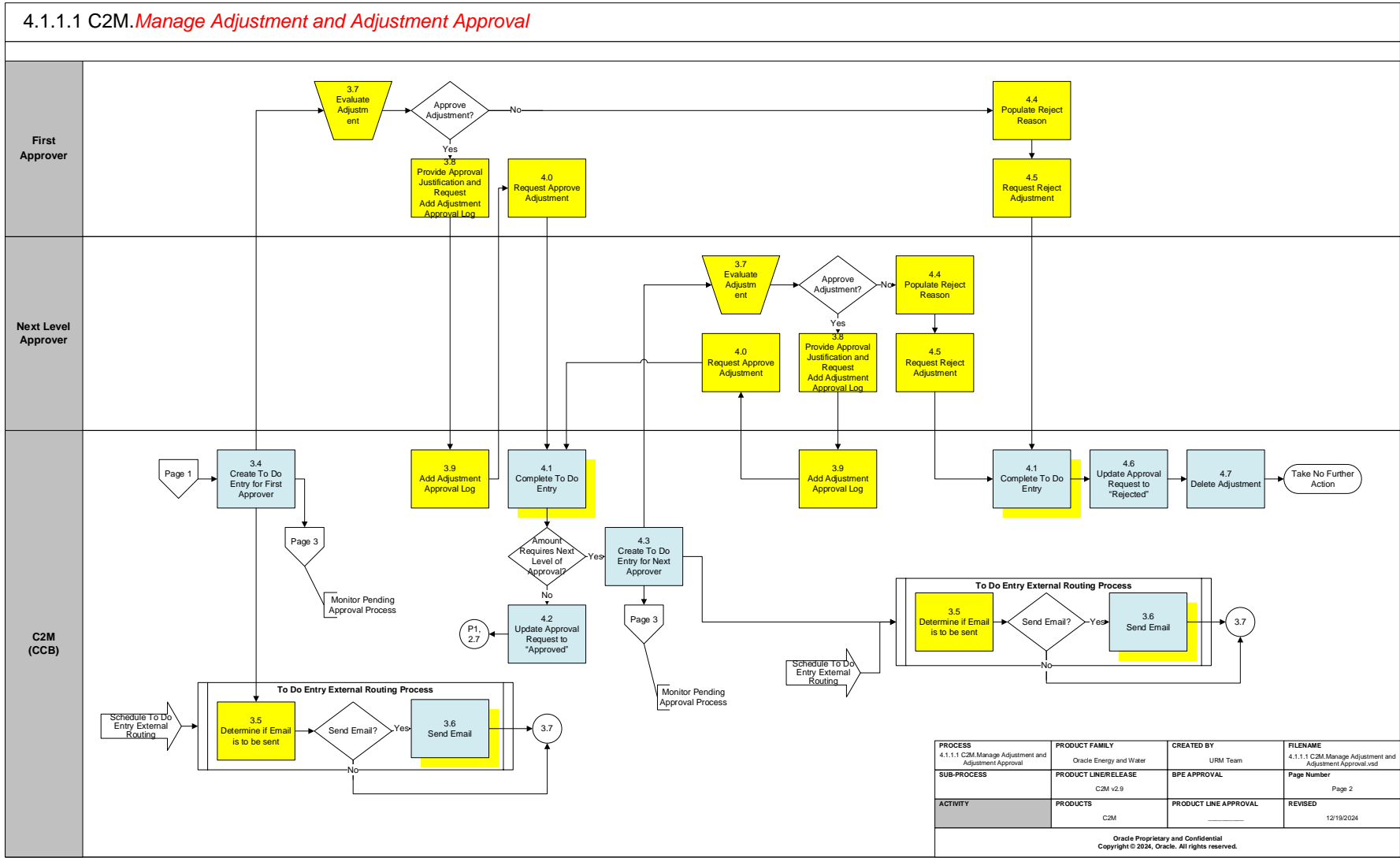
When an Adjustment's Adjustment Type references an Approval Profile, the system will not allow the user to freeze the Adjustment. When the Adjustment is created, it is submitted for approval. C2M(CCB) determines the necessary approval levels and notifies the first approver. C2M(CCB) will freeze the Adjustment when the last approver approves the Adjustment.

Adjustments are created by Authorized Users, dedicated C2M(CCB) batch processes or algorithms or interfaced from external systems. Adjustment Upload Staging tables and related Adjustment Upload Staging batch processes facilitate interfacing adjustment information from external systems.

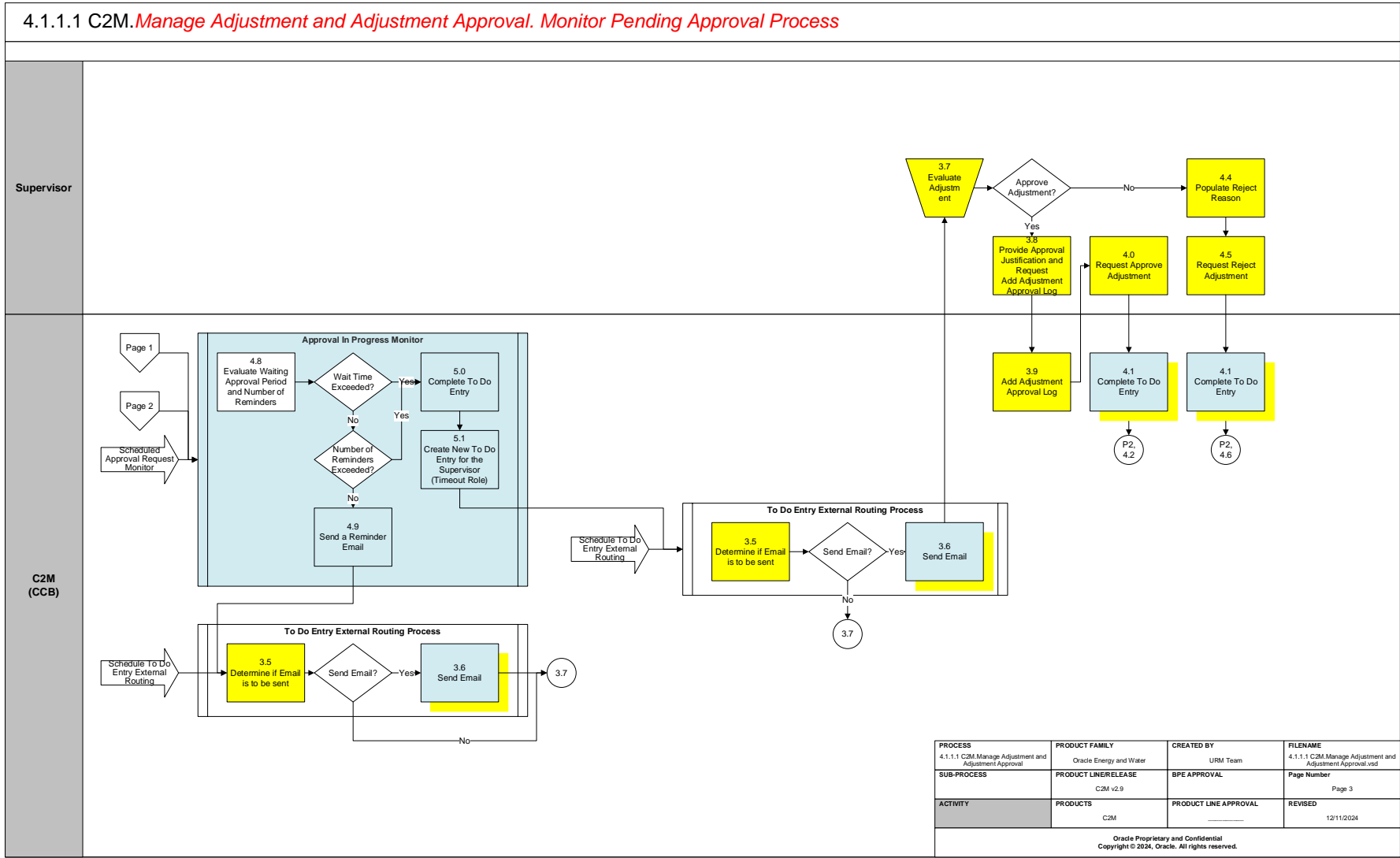
Business Process Model Page 1



Business Process Model Page 2

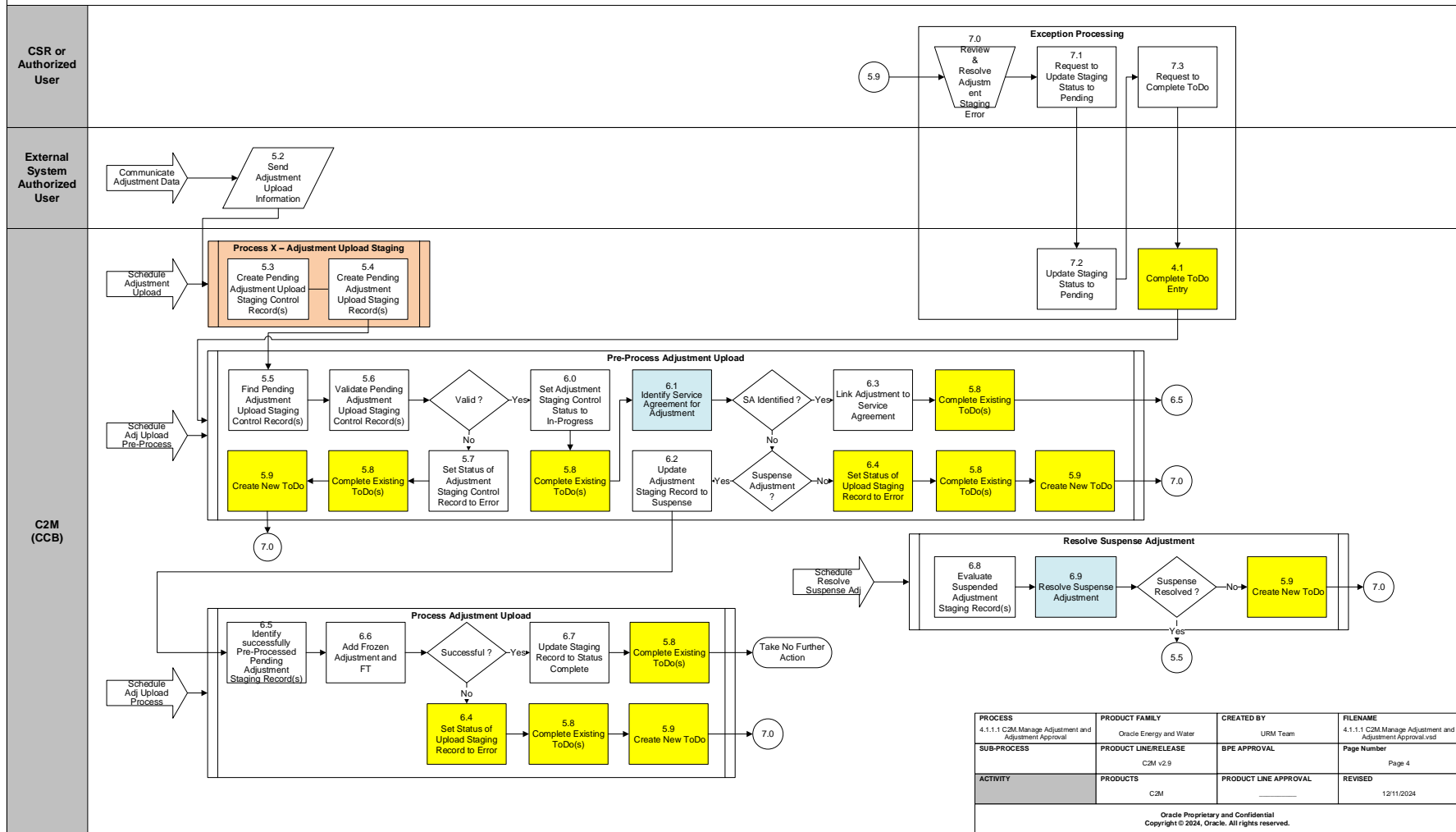


Business Process Model Page 3



## Business Process Model Page 4

### 4.1.1.1 C2M.Manage Adjustment and Adjustment Upload Staging





## Detail Business Process Model Description

### 1.0 Search for Customer

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

**Description:**

The CSR or Authorized User accesses [Control Central](#) Search to locate the customer in C2M(CCB).

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

<a href="#">Installation Options</a>
--------------------------------------

### 1.1 Determine Adjustment Type and Amount

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

**Description:**

The CSR or Authorized User determines the adjustment type and adjustment debit or credit amount.

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

<a href="#">Adjustment Type</a>
Adjustment Type Profile

### 1.2 Populate Adjustment Details and Request Generate Adjustment

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

**Description:**

The CSR or Authorized User verifies Account, Service Agreement and Premise information for the Service Agreement being adjusted. CSR or Authorized User selects the Adjustment Type, populates the debit or credit Amount, adds comments if required, and requests to generate Adjustment.

### 1.3 Add Adjustment and Evaluate Requirements for Approval

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

**Description:**

C2M(CCB) adds the adjustment and evaluates the requirements for approval for the given Adjustment type and amount.

Note: if business requires calculate adjustment amount, system automatically calculates and populates adjustment amount if appropriate Adjustment Type is selected.

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

ADJG-RT - This adjustment generation algorithm is used to calculate an adjustment by calling rate application. Rate application returns a total amount and "bill lines" that show how the charge was calculated (these are derived from the rate's rate components).
----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Configuration required Y

Entities to Configure:

Business Object Y

Business Object:

<p>Rate Schedule identifies the rate that's used to calculate the adjustment. This algorithm passes to this rate the adjustment's base amount as a service quantity and the calculation date as the effective date. The service quantity is identified by the Service Quantity Identifier (SQI), Time of Use (TOU) and Unit of Measure (UOM).</p> <p>The next three parameters are used to apply taxes based on a bill-level threshold. If a bill's accumulated tax amount is less than the tax threshold amount defined on the Apply Taxation Threshold pre-bill completion algorithm, then taxes should not be charged. The pre-bill completion algorithm adds the Tax Not Applicable Characteristic to the adjustment. When the adjustment is regenerated to remove taxes, this characteristic is added into the characteristic collection used by rate application so that it is made available to rate component eligibility criteria to skip the tax calculation lines.</p> <p>C1-ADJG-WO - This adjustment generation algorithm is used to generate a write off adjustment for a given FT based on its billed and unpaid amounts.</p>
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<a href="#">Approval Profile</a>
Adjustment Type
Adjustment Profile
Rate Schedule
To Do Roles

C1-Adjustment - Adjustment - This is business object used to retrieve adjustment details.
C1-AdjustmentType - Adjustment Type - Main Details - This business object retrieves the adjustment type main details.

**1.4 Create Financial Transaction**

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

**Description:** When the system creates an adjustment a financial transaction is created as well.

**Process Plug-in enabled Y      Available Algorithm:**

ADJT-AC - Payoff=Current=Adj Amount (Cash Accounting)
ADJT-AD - Payoff=Current=Adj Amount (Cash Accounting)
ADJT-CA - Payoff Amt = 0 / Current Amt = Adj Amount (no GL)
ADJT-GL - Payoff=Current=0 (GL only)
ADJT-NM - Payoff=Current=Adj Amount
ADJT-RA - Payoff=Adj Amt/Current=0, No GL (Conversion Only)
ADJT-TA - Payoff Amt = Adj / Current Amt = 0
ADJT-TC - Payoff=Adj Amt/Current=0 (Cash Accounting)
C1-FTGL-AD - Deferred Accrual WriteDown-Affects Payoff, Curr, GL
C1-FTGL-ADAC - Deferred Accrual Adj - Affects Payoff, Current & GL
C1-FTGL-ADTC - Deferred Accrual Adj - Affects Payoff & GL
C1-SETL-ADJ - FT GL Creation for Settlement Adjustments
C1-AC-TFHDBL - Payoff=Current=Adj Amount (Cash Acctg) Xfer Hldng
C1-ADJT-CL - Payoff=Current=Adj Amt (Calc Line Dist Code Source)
C1-FTGL-ADNM - Process Holding Account Amounts

**Configuration required Y      Entities to Configure:**

<a href="#">Adjustment Type</a>
---------------------------------

### **1.5 Review Adjustment**

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

**Description:**

The CSR or Authorized User reviews the generated adjustment to determine whether the adjustment needs to be updated, submitted for approval, frozen, or deleted.

### **1.6 Update Adjustment and Request Generate Adjustment**

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

**Description:**

The CSR or Authorized User updates the adjustment information and requests the generation of an adjustment with updated information.

**1.7 Update Adjustment and Evaluate Requirements for Approval**

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

**Description:**

C2M(CCB) updates the adjustment with the new information and then determines if approval is necessary for the updated adjustment based on the approval profile settings.

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

ADJG-RT – This adjustment generation algorithm is used to calculate an adjustment by calling rate application. Rate application returns a total amount and "bill lines" that show how the charge was calculated (these are derived from the rate's rate components).
C1-ADJG-WO - This adjustment generation algorithm is used to generate a write off adjustment for a given FT based on its billed and unpaid amounts.

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

<a href="#">Approval Profile</a>
Adjustment Type
Rate Schedule

**1.8 Delete Financial Transaction**

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

**Description:**

C2M(CCB) removes the **unfrozen** Financial Transaction(s) relating to the deleted or updated adjustment.

**1.9 Request Delete Adjustment**

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

**Description:**

The CSR or Authorized User determines that the adjustment is invalid or incorrect. The CSR or Authorized User requests to [delete the adjustment](#) entry.

**2.0 Delete Adjustment**

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

**Description:**

C2M(CCB) deletes the adjustment when the CSR or Authorized User confirms the deletion request. Financial Transactions linked to the Adjustment are deleted from the system along with the adjustment entry.

**Note:** *Adjustments can only be deleted if they are not frozen.*

**2.1 Request Freeze Adjustment**

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

**Description:**

The CSR or Authorized User issues a request to freeze the adjustment.

**2.2 Submit Adjustment for Approval**

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

**Description:**

The CSR or Authorized User [submits the adjustment for approval](#) when the adjustment type requires approval.

**2.3 Add Adjustment Approval Request**

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

**Description:**

C2M(CCB) adds the adjustment approval request once the CSR submits the adjustment for approval.

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

C1-ADJAPREQT - This algorithm creates an approval request for the adjustment that was submitted for approval. The approval profile for the request is derived from the adjustment type. The Business Object of the Adjustment Approval Request is used for a new approval request record
C1-ADJAR-INF - This algorithm formats the adjustment approval request information that appears throughout the system
C1-ADJAPVAL - This algorithm is used to validate an adjustment approval profile.

**Business Object Y      Business Object:**

C1-AdjustmentApprovalProfile
C1-AdjustmentApprovalRequest

**Configuration required Y      Entities to Configure:**

<a href="#">Approval Profile</a>
To Do Type
To Do Role

**2.4 Determine Approvers**

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

**Description:**

C2M(CCB) determines the approvers based on the adjustment amount against the threshold amounts for the approval request's approval profile.

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

C1-DET-APRVR – The algorithm is responsible for determining the list of users responsible for approving an adjustment.

The adjustment amount is compared to the list of threshold amounts for the approval request's approval profile. If the adjustment amount exceeds the threshold amount, the associated role is added to the list of approvers.

If the adjustment amount is below the lowest threshold, the approval request will be transitioned to the 'No Approval Required' state, otherwise the approval request

Business Object Y      Business Object:

C1-AdjustmentApprovalRequest

Configuration required Y      Entities to Configure:

[Approval Profile](#)

**2.5 Update Approval Request to “Approval in Progress”**

Actor/Role: C2M(CCB)

Description:

If adjustment requires approval and the adjustment amount justifies approval (based on the approval profile settings), C2M(CCB) updates the Approval Request Log to “Approval In Progress”.

Business Object Y      Business Object:

C1-AdjustmentApprovalRequest

**2.6 Update Approval Request to “No Approval Necessary”**

Actor/Role: C2M(CCB)

Description:

If an adjustment requires approval but the adjustment amount is lower than the approval threshold (based on the approval profile settings), C2M(CCB) updates the Approval Request Log to “No Approval Necessary”.

Business Object Y      Business Object:

C1-AdjustmentApprovalRequest

**2.7 Freeze Adjustment and Log Entry; Group: Adjustment Freeze**

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

**Description:**

C2M(CCB) freezes the Adjustment. C2M(CCB) updates the Approval Request Log to “Frozen”. No further action is necessary.

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

ADFR-CRTODO - This algorithm type creates a To Do entry (using the To Do Type and To Do Role (if specified)) when an adjustment of a particular type is frozen.  The base package includes the To Do Type ADJFRZ to use for this parameter value, unless you've set up your own.
C1-DISPPBAP - This algorithm type is used to remove a prepaid customer from automatic payment. Note: to enable this functionality, ensure that the prepaid SA type's NSF adjustment type references this algorithm.
C1-PPBADJFRZ - This algorithm type is used when creating a prepaid funds request adjustment.

**Business Object Y**      **Business Object:**

C1-AdjustmentType - Adjustment Type - Main Details
----------------------------------------------------

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

To Do Type
To Do Role
<a href="#">Adjustment Type</a>

**2.8 Freeze FT for Adjustment; Group: Adjustment Freeze**

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

**Description:**

C2M(CCB) freezes the Financial Transaction(s) for the adjustment.

**2.9 Create A/P Request Staging; Group: Adjustment Freeze**

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

**Description:**

If the adjustment’s adjustment type is an A/P adjustment, C2M(CCB) creates the A/P request staging for it.

**3.0 Cancel Severance; Group: Adjustment Freeze**

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

**Description:**

After the Adjustment and the FT are frozen, C2M(CCB) determines if the account is in a severance process and if it meets severance cancellation criteria; if so, C2M(CCB) cancels the severance process.

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

SEV CAN CRIT - Severance Process Template - Cancel Criteria: Cancel Sev Process If SA Debt <= Threshold Amount
DC SEV CAN - Debt Class - Severance Process Cancellation. Cancel Sev. Proc. If Debt Class Debt <= Threshold

Configuration required Y      Entities to Configure:

Debt Class
Severance Process Template

**3.1 Populate Cancellation Reason and Request Cancel**

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User populates the adjustment cancellation reason and requests to cancel the frozen adjustment.

**3.2 Cancel Adjustment**

Actor/Role: C2M(CCB)

Description:

C2M(CCB) cancels the frozen adjustment. A To-Do entry may be created when Adjustment’s Adjustment Type is configured with an algorithm that creates To-Dos.

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

ADCA-CRTODO – This algorithm type creates a To-Do entry using the input To-Do Type when an adjustment of a particular type is canceled.
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**3.3 Create and Freeze Reverse Financial Transaction**

Actor/Role: C2M(CCB)

Description:

Upon cancellation of the frozen adjustment, C2M(CCB) creates and freezes a reverse Financial Transaction to negate the amount of the original FT.

**3.4 Create To-Do Entry for First Approver**

Actor/Role: C2M(CCB)

Description:

C2M(CCB) creates a To-Do entry for the [First Approver](#)

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



Business Object Y	Business Object:	C1-NTFY-APPR – This algorithm type is responsible for assigning the approval request to the next approval role. If there are more approval roles left in the approval list, a To Do entry is created for the next role in the approval list using the To Do type defined on the approval profile related to this approval request. The role is then removed from the approval list. Once the To Do entry is created, an entry is added to the approval request log referencing this To Do Id and the approval request's current approval To Do id is populated with this value as well. The algorithm also resets the Waiting Retry Count and sets the Waiting Start Date/Time to the current date/time.
		C1-VALTDROLE - Validate that To Do Role is not changed. This algorithm prevents the To Do Role from being changed. This algorithm would typically be used on To Do Types that are used for Adjustment Approval. This ensures that the corresponding Approval Roles are preserved.
Configuration required Y	Entities to Configure:	C1-AdjustmentApprovalRequest
		To Do Type
		To Do Role

**3.5 Determine if Email is to be sent; Group: To Do Entry External Routing Process**

Actor/Role: C2M(CCB)

Description:

C2M(CCB) determines if an email is to be sent when the new To-Do entry is created.

Customizable process N      Process Name:

F1-TDEER – This batch process will read all To-Do entries for a given batch control and run. For each To-Do entry record read, it will invoke the external routing algorithm (defined on the entry's To-Do type).

**3.6 Send Email; Group: To-Do Entry External Routing Process**

Actor/Role: C2M(CCB)

Description:

If an email should be sent, C2M(CCB) sends an email message as soon as the To-Do entry is generated.

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

C1-ADJAREQEM – This algorithm type creates an email outbound message requesting the user to respond to an approval request for the adjustment linked to the To-Do entry being processed. The outbound message type and external system are determined by the first two parameters. If the To-Do is 'Open', the email will be sent to all users linked to the To-Do Role. If the To-Do is 'Being Worked On', only the assigned user will receive an email. The 'from' address for the email is determined by the third parameter (Email From Address). The body of the email includes a hyperlink to navigate to the adjustment requiring approval.
C1-VALTDROLE - Validate that To-Do Role is not changed. This algorithm prevents the To-Do Role from being changed. This algorithm would typically be used on To-Do Types that are used for Adjustment Approval. This ensures that the corresponding

Customizable process N      Process Name:

F1-TDEER – This batch process will read all To-Do entries for a given batch control and run. For each To-Do entry record read, it will invoke the external routing algorithm (defined on the entry's To-Do type).
-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Configuration required Y      Entities to Configure:

Outbound Message Type
External System

**3.7 Evaluate Adjustment**

**Actor/Role:** First Approver, Next Level Approver, Supervisor

**Description:**

The First Approver, Next Level Approver, Supervisor or Authorized User evaluates the adjustment by drilling down on the adjustment approval To-Do entry. This opens the Adjustment Approval portal which contains summary information about the adjustment approval.

**3.8 Provide Approval Justification and Request Add Adjustment Approval Log**

**Actor/Role:** First Approver, Next Level Approver, Supervisor

**Description:**

The First Approver, Next Level Approver, Supervisor or Authorized User provides an adjustment approval reason and issues a request to add an adjustment approval log entry.

**3.9 Add Adjustment Approval Log**

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

**Description:**

C2M(CCB) adds the adjustment approval log entry.

**4.0 Request Approve Adjustment**

**Actor/Role:** First Approver, Next Level Approver, Supervisor

**Description:**

The First Approver, Next Level Approver, Supervisor or Authorized User requests approval for the adjustment.

**4.1 Complete To-Do Entry**

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

**Description:**

C2M(CCB) completes any Pending Approval To-Do Entry when there is a request to approve or reject the adjustment.

**Process Plug-in enabled Y**

**Script(s):**

C1-AdjAprovS - Adjustment Approval Request - Approve

**Configuration required Y**

**Entities to Configure:**

To Do Type  
To Do Role

**4.2 Update Approval Request to “Approved”**

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

**Description:**

C2M(CCB) updates the adjustment approval request to Approved in the Approval Request Log. The adjustment is then frozen in the system.

**Business Object Y**

**Business Object**

C1-AdjustmentApprovalRequest

**Process Plug-in enabled Y**

**Available Algorithm(s):**

C1-FRZ-ADJ - This algorithm is responsible for freezing the adjustment(s) linked to the approved request. An 'approved' log entry is created for the related adjustment. If this is a transfer adjustment, a second log is created for that adjustment id. If the adjustment type for the adjustment is configured to Freeze at Will the algorithm then freezes the

adjustment. If the adjustment type is configured to Freeze at Completion, no further action is taken

4.3 Create To-Do Entry for Next Approver

Actor/Role: C2M(CCB)

Description:

C2M(CCB) creates a To-Do entry for the [Next Level Approver](#). Approval Profile for the adjustment determines whether a higher level of approval is required so that a new To-Do entry is created to the next To-Do role in the approval hierarchy.

Business Object Y

Business Object

C1-AdjustmentApprovalRequest

Process Plug-in enabled Y

Available Algorithm(s):

C1-NTFY-APPR – This algorithm type is responsible for assigning the approval request to the next approval role.

If there are more approval roles left in the approval list, a To-Do entry is created for the next role in the approval list using the To-Do type defined on the approval profile related to this approval request. The role is then removed from the approval list.

Once the To-Do entry is created, an entry is added to the approval request log referencing this To-Do Id and the approval request's current approval To-Do Id is populated with this value as well.

The algorithm also resets the Waiting Retry Count and sets the Waiting Start Date/Time to the current date/time.

Configuration required Y

Entities to Configure:

To Do Type

To Do Role

4.4 Populate Reject Reason

Actor/Role: First Approver, Next level Approver, Supervisor

Description:

The First Approver, Next Level Approver, Supervisor or Authorized User populates the [adjustment approval reject reason](#).

4.5 Request Reject Adjustment

**Actor/Role:** First Approver, Next level Approver, Supervisor

**Description:**

The First Approver, Next Level Approver, Supervisor or Authorized User issues a request to reject the adjustment approval request.

**4.6 Update Approval Request to “Rejected”**

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

**Description:**

C2M(CCB) updates the adjustment approval request to “Rejected” in the Approval Request Log.

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

C1-DEL-ADJ – This algorithm is responsible for deleting the adjustment(s) linked to a rejected adjustment approval request.

A 'rejected' log entry is created indicating the SA of the related adjustment. If this is a transfer adjustment, a second log is created for the SA of the transfer adjustment.

The related adjustments are deleted and the approval request's adjustment id is reset.

**Business Object Y      Business Object**

C1-AdjustmentApprovalRequest

**Lookup Field Y      Lookup Field:**

C1\_AREQ\_REJECT\_RSN\_FLG

**4.7 Delete Adjustment**

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

**Description:**

C2M(CCB) deletes the adjustment once the approval has been rejected. Financial Transactions generated by the adjustment are deleted as well.

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

C1-DEL-ADJ – This algorithm is responsible for deleting the adjustment(s) linked to a rejected adjustment approval request.

**Configuration required Y      Entities to Configure**

Adjustment Type

**4.8 Evaluate Waiting Approval Period and Number of Reminders; Group: Approval In Progress Monitor**

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

**Description:**

C2M(CCB) evaluates the waiting approval period and the number of reminders to determine if the waiting time has exceeded the required threshold as set by the business, and if so, proceeds to re-route approval to upper management.

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

C1-APR-TMOU – This algorithm is responsible for determining if an adjustment approval request has been waiting too long. The algorithm will first determine if the current waiting time for the request exceeds the timeout threshold. If the maximum waiting time has been exceeded, the algorithm will then determine if the maximum number of reminders has been sent. If the number of reminders is below the threshold and the algorithm is configured to send another email reminder, the algorithm will reset the external routing batch control on the current To-Do to trigger the creation of a new email. If the number of reminders is above the threshold, the request is deemed to have timed out. The algorithm will complete the current To-Do if it's Open and create a new To-Do, assigned to the timeout To-Do role. Note that if the current To-Do is Being Worked On it is not completed, but a new To-Do, assigned to the timeout To-Do role, is created.

Business Object Y      Business Object:

C1-AdjustmentApprovalRequest

Configuration required Y      Entities to Configure:

To Do Type  
To Do Role

Customizable process N      Process Name:

C1-APRTR – Approval Request Monitor (Deferred)  
This batch process invokes monitoring rules associated with the current state of approval requests. All monitoring rules throughout the approval request's business object's inheritance chain are considered.

This batch control is set up with the "Restrict By Batch Code" parameter set to true to restrict processing to approval requests whose current state is associated with this specific batch control.

**4.9 Send a Reminder Email; Group: Approval In Progress Monitor**

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

**Description:**

C2M(CCB) sends an email reminder for a To-Do entry that has been waiting too long for approval to the Current Approver

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

C1-APR-TMOUT – This algorithm is responsible for determining if an adjustment approval request has been waiting too long. The algorithm will first determine if the current waiting time for the request exceeds the timeout threshold. If the maximum waiting time has been exceeded, the algorithm will then determine if the maximum number of reminders has been sent. If the number of reminders is below the threshold and the algorithm is configured to send another email reminder, the algorithm will reset the external routing batch control on the current To-Do to trigger the creation of a new email. If the number of reminders is above the threshold, the request is deemed to have timed out. The algorithm will complete the current To-Do if it's Open and create a new To-Do, assigned to the timeout To-Do role. Note that if the current To-Do is Being Worked On it is not completed, but a new To-Do, assigned to the timeout To-Do role, is created.

**Business Object Y      Business Object:**

C1-AdjustmentApprovalRequest

**Configuration required Y      Entities to Configure:**

To Do Type  
To Do Role

**Customizable process N      Process Name:**

C1-APRTR – Approval Request Monitor (Deferred)  
This batch process invokes monitoring rules associated with the current state of approval requests. All monitoring rules throughout the approval request's business object's inheritance chain are considered.

This batch control is set up with the "Restrict By Batch Code" parameter set to true to restrict processing to approval requests whose current state is associated with this specific batch control.

### **5.0 Complete To Do Entry; Group: Approval In Progress Monitor**

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

**Description:**

C2M(CCB) completes the current To Do entry when the To Do has not been completed by the Approver and the timeout threshold has passed.

**Process Plug-in enabled** Y

**Script(s):**

C1-AdjAprovS - Adjustment Approval Request - Approve

**Customizable process** N

**Process Name:**

C1-APRTR – Approval Request Monitor (Deferred)  
This batch process invokes monitoring rules associated with the current state of approval requests. All monitoring rules throughout the approval request's business object's inheritance chain are considered.

This batch control is set up with the "Restrict By Batch Code" parameter set to true to restrict processing to approval requests whose current state is associated with this specific batch control.

### **5.1 Create New To-Do Entry for the Supervisor (Timeout Role); Group: Approval In Progress Monitor**

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

**Description:**

C2M(CCB) creates a new To-Do entry for a [Supervisor](#) or Authorized User when the timeout threshold has passed.

**Process Plug-in enabled** Y

**Available Algorithm(s):**

C1-NTFY-APPR – This algorithm type is responsible for assigning the approval request to the next approval role.

If there are more approval roles left in the approval list, a To-Do entry is created for the next role in the approval list using the To-Do type defined on the approval profile related to this approval request. The role is then removed from the approval list.



Business Object Y

Business Object:

Configuration required Y

Entities to Configure:

Customizable process N

Process Name:

Once the To-Do entry is created, an entry is added to the approval request log referencing this To-Do Id and the approval request's current approval To-Do Id is populated with this value as well.

The algorithm also resets the Waiting Retry Count and sets the Waiting Start Date/Time to the current date/time.

C1-AdjustmentApprovalRequest

To Do Type

To Do Role

C1-APRTR - Approval Request Monitor (Deferred)

This batch process invokes monitoring rules associated with the current state of approval requests. All monitoring rules throughout the approval request's business object's inheritance chain are considered.

This batch control is set up with the "Restrict By Batch Code" parameter set to true to restrict processing to approval requests whose current state is associated with this specific batch control.

5.2 Send Adjustment Upload Information

Actor/Role: External System Authorized User

Description:

The Authorized User gathers the information needed for uploading the adjustment(s) including adjustment amount, account id, and adjustment date, and creates the Adjustment Upload Flat File. This file is used by process X to upload the adjustment(s).

5.3 Create Pending Adjustment Upload Staging Control Record(s), Group: Process X - Adjustment Upload Staging

Actor/Role: C2M(CCB)

Description:

This is a custom process. The following steps walk through the required information needed to populate various staging tables in C2M(CCB). When process X is executed, it requests C2M(CCB) to create Adjustment Upload Staging Control record(s) in Pending status. An adjustment upload staging control record is needed for each batch of adjustments to be uploaded into the system.

Depending on the business needs, an adjustment staging control characteristic record may also be defined for each characteristic you want to link to the adjustment staging control.

Customizable process Y      Process X

This is a completely custom process designed to add Pending records to the required staging tables in C2M(CCB). Specifically, CI\_ADJ\_STG\_CTL and CI\_ADJ\_STG\_CTL\_CHAR may be affected.

**5.4 Create Pending Adjustment Upload Staging Record(s), Group: Process X - Adjustment Upload Staging**

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

**Description:**

C2M(CCB) creates Adjustment Upload Staging records in Pending status. The adjustment information is from the adjustment upload flat file. An adjustment upload staging record is created for each adjustment you want to upload. Depending on the business need, an adjustment characteristic upload staging record may also be defined for each characteristic you want to link to the adjustment upload staging.

Customizable process Y      Process X

This is a completely custom process designed to add Pending records to the required staging tables in C2M(CCB). Specifically, CI\_ADJ\_STG\_UP and CI\_ADJ\_STG\_UP\_CHAR may be affected.

**5.5 Find Pending Adjustment Upload Staging Control Record(s), Group: Pre-Process Adjustment Upload**

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

**Description:**

Navigating the Adjustment Upload Staging Control table, C2M(CCB) finds each Control record in Pending state. These records will be validated and processed.

Customizable process N      Process Name:

C1-ADUP1 - The upload adjustment pre-process batch control performs high level validation of the adjustment staging control and identifies the service agreement for each of the adjustment staging records.

**5.6 Validate Pending Adjustment Upload Staging Control Record(s), Group: Pre-Process Adjustment Upload**

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

**Description:**

C2M(CCB) validates each Pending adjustment Upload Staging Control record. If validation fails for a record, it changes the status to Error and creates a new To-Do. If no errors are found, the status of the Adjustment Staging Control is set to In-Progress.

**5.7 Set Status of Adjustment Staging Control Record to Error, Group: Pre-Process Adjustment Upload****Actor/Role:** C2M(CCB)**Description:**

If validation fails for a Control or Staging record, C2M(CCB) changes the status to Error and creates a new To-Do.

**5.8 Complete Existing ToDo(s), Group: Pre-Process Adjustment Upload****Group: Process Adjustment Upload****Actor/Role:** C2M(CCB)**Description:**

C2M(CCB) completes any existing To-Do(s) that may exist for the current record.

**5.9 Create New ToDo, Group: Pre-Process Adjustment Upload****Group: Process Adjustment Upload,****Group: Resolve Suspense Adjustment****Actor/Role:** C2M(CCB)**Description:**

C2M(CCB) creates a new To-Do entry for the record in Error.

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

To Do Type
To Do Role

**6.0 Set Adjustment Staging Control Status to In-Progress, Group: Pre-Process Adjustment Upload****Actor/Role:** C2M(CCB)**Description:**

If validation succeeds for a record, C2M(CCB) changes the status to In-Progress.

**6.1 Identify Service Agreement for Adjustment, Group: Pre-Process Adjustment Upload****Actor/Role:** C2M(CCB)**Description:**

For each Pending adjustment upload staging record that is linked to an In-Progress staging Control which does not have an SA ID, C2M(CCB) finds its SA ID and stamps it onto the upload staging record.

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

C1-CANSUSADJ - Cancel Suspense Adjustment his Resolve Suspense algorithm checks if a valid customer SA can be found for an adjustment staging record in suspense.
----------------------------------------------------------------------------------------------------------------------------------------------------------------------------

For each adjustment upload staging record found in suspense, it attempts to find a valid prepaid SA for the badge number.

#### **6.2 Update Adjustment Staging Record to Suspense, Group: Pre-Process Adjustment Upload**

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

**Description:**

When the adjustment upload pre-processor is unable to identify a valid SA ID for the adjustment upload staging record, it can put the adjustment in suspense. In this case, the Suspense flag is set to “In Suspense” on the adjustment upload staging.

Adjustments are put in suspense only if such logic is plugged in as the Determine SA algorithm on the Adjustment Type.

#### **6.3 Link Adjustment to Service Agreement, Group: Pre-Process Adjustment Upload**

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

**Description:**

Once the service agreement is identified, C2M(CCB) links the SA to the adjustment upload record by adding the SA ID to the upload staging record.

#### **6.4 Set Status of Upload Staging Record to Error, Group: Pre-Process Adjustment Upload**

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

**Description:**

If C2M(CCB) cannot find an SA ID for the upload staging record or encounters other errors, it will set the status of such staging record to Error.

#### **6.5 Identify Successfully Pre-Processed Pending Adjustment Staging Record(s), Group: Process Adjustment Upload**

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

**Description:**

Navigating the Adjustment Upload Staging table, C2M(CCB) finds each record in Pending state that has an SA ID in order to create an adjustment. These are the upload records that have been pre-processed and validated.

Customizable process N

Process Name:

C1-ADUP2 - The upload adjustment process batch control finds all Pending adjustment upload staging records that reference a service agreement, and creates Frozen Adjustment for each.

#### **6.6 Add Frozen Adjustment and FT, Group: Process Adjustment Upload**

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

**Description:**

C2M(CCB) adds the frozen adjustment for each upload staging record that was found having an SA ID. C2M(CCB) also adds the corresponding Financial Transaction.

#### **6.7 Update Staging Record to Status Complete: Process Adjustment Upload**

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

**Description:**

Once the adjustment is added successfully, C2M(CCB) updates the status of the upload staging record to Complete.

**6.8 Evaluate Suspended Adjustment Staging Record(s); Group: Resolve Suspense Adjustment**

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

**Description:**

C2M(CCB) selects all suspended adjustment staging records, and attempts to resolve the suspension.

**Customizable process N**

**Process Name:**

C1-ADURS - This batch process picks up all adjustment upload staging records that are In Suspense. For each record, it calls the 'Resolve Suspense' plug-in for the adjustment upload staging's adjustment type.

**6.9 Resolve Suspense Adjustment; Group: Resolve Suspense Adjustment**

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

**Description:**

The Resolve Suspense algorithm checks if a valid SA can be found for the adjustment staging record in suspense. If a valid SA is found, a new adjustment is created for the SA, and the SA is linked to the adjustment upload staging record. Then the suspense adjustment is canceled. If a valid SA is not found, it checks to see if the record has been in suspense for too long; and if so, it creates a To-Do Entry for the upload

**Process Plug-in enabled Y**

**Available Algorithm(s):**

C1-CANSUSADJ – Cancel Suspense Adjustment  
 This Resolve Suspense algorithm checks if a valid customer SA can be found for an adjustment staging record in suspense.  
 For each adjustment upload staging record found in suspense, it attempts to find a valid prepaid SA for the badge number.  
 This algorithm expects the following:  
 - The badge number is supplied as a characteristic (with the Badge Number Characteristic Type - parm 1) on the adjustment upload staging record  
 - A prepaid SA is one whose SA Type has a characteristic with the Prepaid Characteristic Type (parm 2)  
 If a valid SA is found:  
 - A new adjustment is created for the SA using the Adjustment Type (parm 3)

- The new adjustment ID is linked to the adjustment upload staging

- The suspense adjustment is canceled using the Adjustment Cancel Reason (parm 4). The suspense adjustment remains linked to the adjustment upload staging as an audit.

If a valid SA is not found, check to see if the record has been in suspense for too long. If Number Of Days (parm 5) > 0 and To Do Type (parm 6) is supplied:

- Calculate the number of days that the record has been in suspense
- Create a To-Do Entry using the input To-Do Type if the calculated number exceeds the input number of days

You may specify a To-Do Role. For more information about how a To Do Role is assigned, launch the online help and navigate to the index entry "To-Do Entries Reference A Role".

The algorithm populates the To-Do Entry with the sort keys, drill keys and message parameters as shown in the base package To-Do Type C1-ADSUS, which you may use for this algorithm. If you want to create your own To-Do Type, you must set up the values to match those in the base To-Do Type.

Configuration required Y      Entities to Configure:

Adjustment Type

#### **7.0 Review and Resolve Adjustment Staging Error; Group: Exception Processing**

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

**Description:**

CSR or Authorized User reviews and resolves the adjustment staging error.

#### **7.1 Request to Update Staging Status to Pending; Group: Exception Processing**

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

**Description:**

Once the Error is resolved, the CSR or Authorized user requests that the status of the upload staging to be set to Pending or In-Progress.

#### **7.2 Update Staging Status to Pending; Group: Exception Processing**

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

**Description:**

C2M(CCB) changes the status of the upload staging to be set to Pending or In-Progress.

**7.3 Request to Complete To Do; Group: Exception Processing**

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

**Description:**

CSR or Authorized User requests to Complete the To-Do.

## Test Assets related to the Current Process

Testing Asset Sr.No	Testing Asset-Flows	No Of Data sets
1	URM-C2M-4111-001-Generate-Adjustment-With-Or-Without-Approval	2
2	URM-C2M-4111-002-Generate-And-Freeze-Adjustment	1
3	URM-C2M-4111-003-Delete-Adjustment	2
4	URM-C2M-4111-004-Cancel-Frozen-Adjustment-No-Approval	1
5	URM-C2M-4111-005-Cancel-Frozen-Adjustment-With-Approval	1
6	URM-C2M-4111-006-Generate-Freeze-Approve-Adjustment	1
7	URM-C2M-4111-007-Update-Adjustment	2
8	URM-C2M-4111-008-Update-ArrearsDate-Of-Adjustment	1
9	URM-C2M-4111-009-Transfer-Adjustment	1
10	URM-C2M-4111-010-Generate-Adj-ChangeAmount-MultipleLevel-Approval	1



## Document Control

### Change Record

Date	Author	Version	Change Reference
10/11/2011	Leonel Urena	1.0	Revised document version.
03/05/2012	Ahad Gholipour-Abbasi	1.1	Updated Document and Visio
03/15/2012	Galina Polonsky	1.1	Reviewed
9/13/2013	Mel Bachmeier, Dean Davis	2.0	Updated Document and Visio
9/26/2013	Galina Polonsky	2.0	Approved
8/18/2015	Jane Cuenco Tan	3.0	Updated Document and Visio
10/08/2015	Galina Polonsky	2.0	Reviewed, Approved
08/16/2017	Ekta Dua		Updated Document and Visio to v2.6
09/22/2017	Genti Kondili		Updated Document and Visio for C2M
10/18/2017	Galina Polonsky		Reviewed, Approved
08/21/2018	Jerry Chick		Replaced Page 1 Visio with updated version. Added note to 2.0. Grammatical and syntax corrections.
09/12/2018	Galina Polonsky		Reviewed, Approved
06/03/2019	Satya Kalavala		Updated format for 2.7
09/09/2024	Kunal Nerkar		Updated document and Visio for C2M v2.9
09/20/2024	Pablo Siegrist		Reviewed
12/18/2024	Galina Polonsky		Reviewed, Approved

## Attachments

### Control Central Search

Control Central Search

Bookmark

Refresh

Main

Control Central Search

Search By

Name and Address

Name and Address

Account ID

Person Contact

Person ID Type/Value

Geo Type/Value

Name

Account ID

Address

CIS Division

Show All Premises

Search

### Admin Menu / Installation Options Control Central Alerts

#### Installation Options Control Central Alert Algorithm Types

Algorithm Type	Description
C1-BSFLGALRT	Highlight Open Business Flags
C1-CASH-ACCT	Highlight Cash Only Account

C1-CCAL-CLM	Highlight Open Rebate Claims
C1-CCAL-OCBG	Highlight Open Off Cycle Bill Generators
C1-COLL-REF	Highlight Active Collection Referral
C1-COLLPR-AC	Highlight Active Collection Process
C1-CRRT-ACCT	Highlight Credit Rating
C1-HOPNCRR	Highlight Open Customer Relationship Requests
C1-LSSL-PER	Highlight Person Life Support/Sensitive Load
C1-LSSL-PRM	Highlight Premise Life Support/Sensitive Load
C1-OD-PROC	Highlight Active Overdue Processes
C1-OPENLDALR	Retrieve Open Leads
C1-OPN-MEVT	Highlight Open and Disputed Match Events
C1-OPSTSKALT	Retrieve Open CSS Service Task Alert
C1-PEND-STRT	Highlight Pending Start
C1-SCHOTPAY	Highlight Scheduled CSS One Time Payments
C1-SEVPR-ACT	Highlight Active Severance Processes
C1-STASKALRT	Retrieve Open Service Tasks
C1-STOP-SA	Highlight Stopped SAs
C1-STSKALSAC	Service Task Alert By SA Characteristic
C1-WO-BILL	Highlight Written Off Bills
CC BY TYPCL	Count number of customer contacts
CCAL-CASE	Highlight cases
CCAL-DECL	Highlight Effective Declarations for Acct and Prem
CCAL-FAERMSG	Highlight FAs with outstanding outgoing messages
CCAL-TD	Highlight outstanding To Do entries
CCAL-WF	Account or Premise linked to Active Workflow Process
F1-SYNRQALRT	Retrieve Outstanding Sync Request
PP BY STATUS	Count pay plans

Adjustment Approval Lifecycle

Approval Profile: Miscellaneous fees

AddBookmarkRefresh

Main

1DEPOSITDeposits

2MISCFEESMiscellaneous fees

Approval Profile

Main

Approval ProfileMISCFEES

DescriptionMiscellaneous fees

Business ObjectAdjustment Approval Profile

To Do TypeAdjustments Requiring Approval

Transfer Adjustment PrecedenceDebit

Debit Hierarchy

Threshold Amount	To Do Role
\$100.00	Approval - Level 1
\$1,000.00	Approval - Level 2
\$10,000.00	Approval - Level 3

Credit Hierarchy

Threshold Amount	To Do Role
\$100.00	Approval - Level 1
\$1,000.00	Approval - Level 2
\$10,000.00	Approval - Level 3

EditDeleteDuplicate

Approval Profile's Adjustment Types

Filters: Approval Profile MISCFEES

	Adjustment Type
1	Additional charge plus tax
2	Connection charge
3	Cross Meter Adjustment
4	Customer relationship expense
5	Late payment charge
6	Non-sufficient funds

Adjustment Approval Page

Adjustment

Bookmark

Clear

Save

Refresh

Main

Characteristics

Transfer Adjustment

A/P Request

Approval

Adjustment Portal

Adjustment Information

Account

Turner,Martha, Commercial, \$431.42

Service Agreement

California / Gas Commercial, G-SGSVC, Active, 01-03-2017, 0823208299

Premise

89 Pine Street, San Francisco, CA, 94105

Adjustment Type

Additional charge plus tax

Amount

\$35,700.00

Adjustment ID

082903118479

Approval Request

Current Approver

To Do

Adjustments Requiring Approval - Open, 07-01-2021 11:06:35

To Do Role

Approval - Level 1

Approve

Reject

Future Approvers

To Do Role

Approval - Level 2

Approval - Level 3

Approval Request Log

Add Log Entry

Filters: Approval Request 934078715853

	Date/Time	Details	User	Log Type	Related Object
1	07-01-2021 11:06:36	Assigned Approval Request to Next Approver	Nerkar , Kunal ( KNERKAR )	System	Adjustments Requiring Approval - Open, 07-01-2021 11:06:35
2	07-01-2021 11:06:33	Transitioned to Approval In Progress.	Nerkar , Kunal ( KNERKAR )	Status Transition	
3	07-01-2021 11:06:33	Created in status Determine Approvers.	Nerkar , Kunal ( KNERKAR )	Created	

Add Adjustment with Approval

Adjustment

Bookmark

Clear

Save

Refresh

Main

Characteristics

Transfer Adjustment

A/P Request

Approval

Adjustment Portal

Adjustment Info

\$297.50, ADCHARTX - Additional charge plus tax, Freezable

Adjustment ID082028449114

Account ID

0820255720 Turner,Martha, Commercial, \$431.42

Service Agreement

0823208299 California / Gas Commercial, G-SGSVC, Active, 01-03-2017, 0823208299

Premise

89 Pine Street, San Francisco, CA, 94105

Adjustment Type

ADCHARTX Additional charge plus tax

Creation Date

03-28-2017

Amount

\$250.00

Calculated Amount

\$297.50

Calculation Date

03-28-2017

Adjustment Status

Freezable

Comments

This Adjustment is linked to an Approval Request.

Financial Transaction ID	Arrears Date	Accounting Date	Current Amount	Payoff Amount	Bill ID
082098106627		03-28-2017	\$297.50	\$297.50	

Calculation Details

All "" displayed

Expand All

Collapse All

Rate Version

Calculated adjustment 01-01-2000

Add Adjustment without Approval

Adjustment

Bookmark

Previous Item

Next Item

Clear

Save

Refresh

Main

Characteristics

Transfer Adjustment

A/P Request

Adjustment Portal

Adjustment Info

\$3.82, LPC - Late payment charge, Frozen

Adjustment ID

988713399806

Account ID

9881520328 Banks,Beatrice, Residential, \$260.53

Service Agreement

9880646289 California / Electric Residential - TOU Rat, ER-TOUMI, Active, 08-01-2018, 9880646289

Premise

110 Landers St, San Francisco, CA, 94103

Adjustment Type

LPC Late payment charge

Creation Date

03-01-2020

Amount

\$3.82

Adjustment Status

Frozen

Comments

Financial Transaction ID	Arrears Date	Accounting Date	Current Amount	Payoff Amount	Bill ID
988005206279		03-01-2020	\$3.82	\$3.82	

Adjustment Actions

Generate

Freeze

Cancel

Delete

Approval Profile

Approval Profile: Miscellaneous fees

Add

Bookmark

Refresh

Main

1

DEPOSIT

Deposits

2

MISCFEES

Miscellaneous fees

Approval Profile

Main

Approval Profile

MISCFEES

Description

Miscellaneous fees

Business Object

Adjustment Approval Profile

To Do Type

Adjustments Requiring Approval

Transfer Adjustment Precedence

Debit

Debit Hierarchy

Threshold Amount	To Do Role
\$100.00	Approval - Level 1
\$1,000.00	Approval - Level 2
\$10,000.00	Approval - Level 3

Credit Hierarchy

Threshold Amount	To Do Role
\$100.00	Approval - Level 1
\$1,000.00	Approval - Level 2
\$10,000.00	Approval - Level 3

Edit

Delete

Duplicate

Approval Profile's Adjustment Types

Filters: Approval Profile MISCFEES

	Adjustment Type
1	Additional charge plus tax
2	Connection charge
3	Cross Meter Adjustment
4	Customer relationship expense
5	Late payment charge
6	Non-sufficient funds



Cancel Adjustment

Adjustment

Bookmark

Next Item

Clear

Save

Refresh

Main

Characteristics

Transfer Adjustment

A/P Request

Approval

Adjustment Portal

Adjustment Info

\$32.00, ADDCHARG - Additional charge, Canceled

Adjustment ID

495639499589

Account ID

4957604456

Loaf and Jug, Commercial, \$4,133.33

Service Agreement

4959124312

California / One time charge, Closed, 07-03-2017 - 07-03-2017, Repair of damaged line fees, 4959124312

Premise

Adjustment Type

ADDCHARG

Additional charge

Creation Date

07-03-2017

Amount

\$32.00

Adjustment Status

Canceled

Cancel Reason

Incorrect adjustment

Comments

Financial Transaction ID	Arrears Date	Accounting Date	Current Amount	Payoff Amount	Bill ID
<div>495390772805</div>		07-03-2017	\$-32.00	\$-32.00	<div></div>
<div>495546095625</div>		07-03-2017	\$32.00	\$32.00	<div></div>

Adjustment Actions

Generate

Freeze

Cancel

Delete

Delete Adjustment

Adjustment

Main

Characteristics

Transfer Adjustment

A/P Request

Are you sure you want to delete this object?

OK

Cancel

Save

Refresh

Adjustment Info

\$25.00, ADDCHARG - Additional charge, Freezable

Adjustment ID

70799146618

Account ID

7079136995

BCS-SD,Person\_42363, Residential, \$69.43

Service Agreement

7074356793

California / Electric Residential, ERES1, Active, 01-01-2020, Single family - no seasonal factors, 7074356793

Premise

3278\_SD Street, San Francisco, CA, 94105

Adjustment Type

ADDCHARG

Additional charge

Creation Date

07-01-2021

Amount

\$25.00

Adjustment Status

Freezable

Comments

Financial Transaction ID	Arrears Date	Accounting Date	Current Amount	Payoff Amount	Bill ID
<div>707368555472</div>		07-01-2021	\$25.00	\$25.00	

Adjustment Actions

Generate

Freeze

Cancel

Delete

Evaluate Adjustment - To Do - First Approver - Level 1

To Do Entry: Adjustments Requiring Approval - Open, 07-01-2021 11:06:35

Add

Search

Bookmark

Refresh

Main

Log

To Do Entry

Main

To Do

Adjustments Requiring Approval - Open, 07-01-2021 11:06:35

7 Related To Dos

To Do Type

Adjustments Requiring Approval

To Do Role

Approval - Level 1

Message

\$35,700.00 Additional charge plus tax adjustment for Turner,Martha requires approval. (11110,80101)

Related Object

\$35,700.00, ADCHARTX - Additional charge plus tax, Freezable

Status

Open

Priority

Priority 10 -- Highest

Total Duration

2 minutes

Extract Info

This To Do Entry will be processed by the next To Do Entry External Routing batch.

Record Actions

Edit

Work

Start Progress

Forward

Complete

Record Information

Sort Keys

Description	Key Value
Adjustment Amount	35700.00

To Do Characteristics

	Characteristic Type	Sequence	Characteristic Value
1	Account	5	Turner,Martha, Commercial, \$431.42
2	Contact ID Characteristic Type	3	Turner,Martha
3	Device ID Characteristic Type	1	GRI-1000020 / Gas Smart Meter / Install Date/Time: 12-31-2016 0:00:00 PST / Connected / Commissioned / Active
4	Measuring Component ID Characteristic Type	1	GRI-1000020 / Gas Interval CCF - 60 min
5	Person	7	Turner,Martha - Home Phone: (415) 674-2032
6	Premise	6	89 Pine Street, San Francisco, CA, 94105
7	Service Agreement	8	California / Gas Commercial, G-SGSVC, Active, 01-03-2017, 0823208299
8	Service Point	9	89 Pine Street, San Francisco, CA, 94105 / Gas Commercial / Gas / GRI-1000020 / Read Cycle 01, Route 100 / Active
9	Service Point ID Characteristic Type	2	89 Pine Street, San Francisco, CA, 94105 / Gas Commercial / Gas / GRI-1000020 / Read Cycle 01, Route 100 / Active
10	Usage Subscription ID Characteristic Type	4	Turner,Martha / Gas - Commercial / 01-03-2017 0:00:00 PST / Active

Evaluate Adjustment - To Do - Next Approver Level 2

To Do Entry

Main

To Do

Adjustments Requiring Approval - Open, 07-01-2021 11:09:31

7 Related To Dos

To Do Type

Adjustments Requiring Approval

To Do Role

Approval - Level 2

Message

\$35,700.00 Additional charge plus tax adjustment for Turner,Martha requires approval. (11110,80101)

Related Object

\$35,700.00, ADCHARTX - Additional charge plus tax, Freezable

Status

Open

Priority

Priority 10 -- Highest

Total Duration

0 minutes

Extract Info

This To Do Entry will be processed by the next To Do Entry External Routing batch.

Record Actions

Edit

Record Information

Sort Keys

Description	Key Value
Adjustment Amount	35700.00

To Do Characteristics

	Characteristic Type	Sequence	Characteristic Value
1	Account	5	Turner,Martha, Commercial, \$431.42
2	Contact ID Characteristic Type	3	Turner,Martha
3	Device ID Characteristic Type	1	GRI-1000020 / Gas Smart Meter / Install Date/Time: 12-31-2016 0:00:00 PST / Connected / Commissioned / Active
4	Measuring Component ID Characteristic Type	1	GRI-1000020 / Gas Interval CCF - 60 min
5	Person	7	Turner,Martha - Home Phone: (415) 674-2032
6	Premise	6	89 Pine Street, San Francisco, CA, 94105
7	Service Agreement	8	California / Gas Commercial, G-SGSVC, Active, 01-03-2017, 0823208299
8	Service Point	9	89 Pine Street, San Francisco, CA, 94105 / Gas Commercial / Gas / GRI-1000020 / Read Cycle 01, Route 100 / Active
9	Service Point ID Characteristic Type	2	89 Pine Street, San Francisco, CA, 94105 / Gas Commercial / Gas / GRI-1000020 / Read Cycle 01, Route 100 / Active
10	Usage Subscription ID Characteristic Type	4	Turner,Martha / Gas - Commercial / 01-03-2017 0:00:00 PST / Active

Related To Do Entries

Evaluate Adjustment - To Do - Last Approver Level 3

To Do Entry: Adjustments Requiring Approval - Open, 07-01-2021 11:10:44

Add

Search

Bookmark

Refresh

Main

Log

To Do Entry

Main

To Do

Adjustments Requiring Approval - Open, 07-01-2021 11:10:44

7 Related To Dos

To Do Type

Adjustments Requiring Approval

To Do Role

Approval - Level 3

Message

\$35,700.00 Additional charge plus tax adjustment for Turner,Martha requires approval. (11110,80101)

Related Object

\$35,700.00, ADCHARTX - Additional charge plus tax, Freezable

Status

Open

Priority

Priority 10 -- Highest

Total Duration

0 minutes

Extract Info

This To Do Entry will be processed by the next To Do Entry External Routing batch.

Record Actions

Edit

Record Information

Sort Keys

Description	Key Value
Adjustment Amount	35700.00

To Do Characteristics

	Characteristic Type	Sequence	Characteristic Value
1	Account	5	Turner,Martha, Commercial, \$431.42
2	Contact ID Characteristic Type	3	Turner,Martha
3	Device ID Characteristic Type	1	GRI-1000020 / Gas Smart Meter / Install Date/Time: 12-31-2016 0:00:00 PST / Connected / Commissioned / Active
4	Measuring Component ID Characteristic Type	1	GRI-1000020 / Gas Interval CCF - 60 min
5	Person	7	Turner,Martha - Home Phone: (415) 674-2032
6	Premise	6	89 Pine Street, San Francisco, CA, 94105
7	Service Agreement	8	California / Gas Commercial, G-SGSVC, Active, 01-03-2017, 0823208299
8	Service Point	9	89 Pine Street, San Francisco, CA, 94105 / Gas Commercial / Gas / GRI-1000020 / Read Cycle 01, Route 100 / Active
9	Service Point ID Characteristic Type	2	89 Pine Street, San Francisco, CA, 94105 / Gas Commercial / Gas / GRI-1000020 / Read Cycle 01, Route 100 / Active
10	Usage Subscription ID Characteristic Type	4	Turner,Martha / Gas - Commercial / 01-03-2017 0:00:00 PST / Active

Reject Adjustment

Adjustment

Bookmark

Previous Item

Next Item

Clear

Save

Refresh

Main

Characteristics

Transfer Adjustment

A/P Request

Approval

Adjustment Portal

Adjustment Information

Account

Turner,Martha, Commercial, \$431.42

Service Agreement

California / Gas Commercial, G-SGSVC, Active, 01-03-2017, 0823208299

Premise

89 Pine Street, San Francisco, CA, 94105

Adjustment Type

Additional charge plus tax

Amount

\$297.50

Adjustment ID

082028449114

Approval Request

Current Approver

To Do

Adjustments Requiring Approval - Assigned, 03-28-2017 17:14:49

To Do Role

Approval - Level 1

User

Gulpeo, Rissa

Approve

Reject

Approval Request Log

Add Log Entry

Reject Approval Request - Google Chrome

us-ashburn-1.opd.utilities-cloud.oracleindustry....

Reject Approval Request

Reject Reason

Incorrect Adjustment

OK

Cancel

Submit for Approval - Approval Required

Adjustment

Bookmark

Clear

Save

Refresh

Main

Characteristics

Transfer Adjustment

A/P Request

Adjustment Portal

Adjustment Info

\$35,700.00, ADCHARTX - Additional charge plus tax, Freezable

Adjustment ID082903118479

Account ID

0820255720

Turner,Martha, Commercial, \$431.42

Service Agreement

0823208299

California / Gas Commercial, G-SGSVC, Active, 01-03-2017, 0823208299

Premise

89 Pine Street, San Francisco, CA, 94105

Adjustment Type

ADCHARTX

Additional charge plus tax

Creation Date07-01-2021

Amount

\$30,000.00

Calculated Amount\$35,700.00

Calculation Date07-01-2021

Adjustment Status

Freezable

Comments

Financial Transaction ID	Arrears Date	Accounting Date	Current Amount	Payoff Amount	Bill ID
082605068039		07-01-2021	\$35,700.00	\$35,700.00	

Calculation Details

All "1" displayed [Expand All] [Collapse All]

Rate Version

Calculated adjustment

01-01-2000

Adjustment Actions

Generate

Submit for Approval

Cancel

Delete

## Adjustment Type Entities

Approval Profile:

APPR_PROF_CD	DESCR	BUS_OBJ_CD
MISCFEES	Miscellaneous fees	C1-AdjustmentApprovalProfile
DEPOSIT	Deposits	C1-AdjustmentApprovalProfile

A/P Request Type:

AP_REQ_TYPE_CD	DESCR	DUE_DAYS	PYMNT_METHOD_FLG
LOAN	Loan disbursement	7	CHK
REFUND	Refund	7	CHK

Adjustment Cancel Reason:

CAN_RSN_CD	DESCR
CRTY	Courtesy Adjustment Reversal
ERR	Incorrect Adjustment

Lookup Table:

FIELD_NAME	Java Field Name	CUSTOM_SW	FIELD_VALUE	DESCR
ADJ_AMT_TYPE_FLG	adjustmentAmountType	N	AMT	Non-Calculated Amount
ADJ_AMT_TYPE_FLG	adjustmentAmountType	N	CALC	Calculated Amount
AD_FRZ_OPT_FLG	adjustmentFreezeOption	N	ATWL	Freeze At Will
AD_FRZ_OPT_FLG	adjustmentFreezeOption	N	BCMP	Freeze At Bill Completion
AP_1099_FLG	ap1099	N	IN	Interest
AP_1099_FLG	ap1099	N	MC	Miscellaneous
C1_AREQ_REJECT_RSN_FLG	cmIncorrectAjd	Y	CM01	Incorrect Adjustment

Portal and Zone:

PORTAL_CD	DESCR	PAGE_TYPE	USER_CONFIG_FLG	ZONE_CD	ZONE_DESCR
C1APROF	Approval Profile	Portal	N	C1-APROFADJT	Approval Profile's Adjustment Types
C1APROF	Approval Profile	Portal	N	C1-APROFDISP	Approval Profile
C1APROF	Approval Profile	Portal	N	C1-APROFQRY	Approval Profile List



Zone	Description	Zone Type	Zone Type Description
C1-ADJINFO	Adjustment Information	F1-MAPEXPL	Explicit Object Map
C1-ADJTYPEQ	Adjustment Type	F1-DE-QUERY	Query Data Explorer - Multiple SQLs
C1-APROFADJC	Approval Profile's Adjustment Type Existence Check	F1-DE-SINGLE	Info Data Explorer - Single SQL
C1-APROFADJT	Approval Profile's Adjustment Types	F1-DE-SINGLE	Info Data Explorer - Single SQL
C1-APROFDISP	Approval Profile	F1-MAPDERV	Derived Object Map
C1-APROFQRY	Approval Profile List	F1-DE-SINGLE	Info Data Explorer - Single SQL

Business Objects:

Business Object	Description	Maintenance Object	Maintenance Object Description
C1-Adjustment	Adjustment - Read Main Details	ADJUSTMENT	Adjustment
C1-AdjustmentApprovalProfile	Adjustment Approval Profile	C1-APPR PROF	Approval Profile
C1-AdjustmentApprovalRequest	Adjustment Approval Request	C1-APPR REQ	Approval Request
C1-AdjustmentType	Adjustment Type - Main Details	ADJ TYPE	Adjustment Type
C1-AdjCancelReasonPhysicalBO	Physical BO for Adjustment Cancel Reason	ADJ CAN RSN	Adjustment Cancel Reason
C1-AdjTypePhysicalBO	Physical BO for Adjustment Type	ADJ TYPE	Adjustment Type
C1-AdjTypeProfPhysicalBO	Physical BO for Adjustment Type Profile	ADJ TYPE PRF	Adjustment Type Profile

## Adjustment Type and Adjustment Approval Algorithms

Algorithm Types exist for Adjustment Type configuration.

System Event	Algorithm Type	Algorithm Type Description
Adjustment Type - Adjustment Cancellation	ADCA-CRTODO	Adjustment Cancellation - Create To Do Entry
Adjustment Type - Adjustment FT Creation	ADJT-AC	Payoff=Current=Adj Amount (Cash Accounting)

Adjustment Type - Adjustment FT Creation	ADJT-AD	Payoff=Current=Adj Amount (Cash Accounting)
Adjustment Type - Adjustment FT Creation	ADJT-CA	Payoff=0/Current=Adj Amount (No GL)
Adjustment Type - Adjustment FT Creation	ADJT-GL	Payoff=Current=0 (GL only)
Adjustment Type - Adjustment FT Creation	ADJT-NM	Payoff=Current=Adj Amount
Adjustment Type - Adjustment FT Creation	ADJT-RA	Payoff=Adj Amt/Current=0, No GL (Conversion Only)
Adjustment Type - Adjustment FT Creation	ADJT-TA	Payoff=Adj Amt/Current=0
Adjustment Type - Adjustment FT Creation	ADJT-TC	Payoff=Adj Amt/Current=0 (Cash Accounting)
Adjustment Type - Adjustment FT Creation	C1-AC-TFHDBL	Payoff=Current=Adj Amount (Cash Acctg) Xfer Hldng
Adjustment Type - Adjustment FT Creation	C1-ADJT-CL	Payoff=Current=Adj Amt (Calc Line Dist Code Source)
Adjustment Type - Adjustment FT Creation	C1-FTGL-AD	Deferred Accrual WriteDown-Affects Payoff, Curr,GL
Adjustment Type - Adjustment FT Creation	C1-FTGL-ADAC	Deferred Accrual Adj - Affects Payoff,Current & GL
Adjustment Type - Adjustment FT Creation	C1-FTGL-ADNM	Process Holding Account Amounts
Adjustment Type - Adjustment FT Creation	C1-FTGL-ADTC	Deferred Accrual Adj - Affects Payoff & GL
Adjustment Type - Adjustment FT Creation	C1-SETL-ADJ	FT GL Creation for Settlement Adjustments
Adjustment Type - Adjustment Freeze	ADFR-CRTODO	Adjustment Freeze - Create To Do Entry
Adjustment Type - Adjustment Freeze	C1-DISPPBAP	Disable Prepaid Biller Automatic Payment
Adjustment Type - Adjustment Freeze	C1-PPBADJFRZ	Set Prepaid Funds Request FT Details
Adjustment Type - Adjustment Information	C1-ADT-INFO	Adjustment Information
Adjustment Type - Determine SA	C1-SABYBADGE	Get Prepaid SA Using Badge Number
Adjustment Type - Generate	ADJG-RT	Adjustment Generation - Apply Rate
Adjustment Type - Generate	C1-ADJG-WO	Generate Adjustment - Write Off Bills
Adjustment Type - Resolve Suspense	C1-CANSUSADJ	Cancel Suspense Adjustment
Adjustment Type - Validate Adjustment	C1-VALXFRADJ	Validate Transfer Adjustment

**Business Object Algorithms**

Business Object algorithms are configured for use when system events occur.

BUS_OBJ_CD	SYSTEM EVENT	Algorithm Code	Algorithm Description	Algorithm Type	Algorithm Type Description
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C1-AdjustmentApproval Profile	Determine Approval Requirements	C1-ADJREQTDF	Determine Adjustment Approval Requirements Default	C1-ADJAPREQT	Determine Adjustment Approval Requirements
C1-AdjustmentApproval Profile	Validation	C1-ADJAP-DF	Adjustment Approval Profile Validation - Default	C1-ADJAPVAL	Adjustment Approval Profile Validation
C1-AdjustmentApproval Request	Information	C1-ADJARI-DF	Adjustment Approval Request Information	C1-ADJAR-INF	Adjustment Approval Request Information

BUS_OBJ_CD	LIFECYCLE STATUS	SYSTEM EVENT	Algorithm Code	Algorithm Description	Algorithm Type	Algorithm Type Description
C1-AdjustmentApproval Request	REJECTED	Enter	C1-DEL-ADJ	Delete Rejected Adjustments	C1-DEL-ADJ	Delete Rejected Adjustment(s)
C1-AdjustmentApproval Request	DETAPPROVERS	Enter	C1-DET-APRVR	Determine Approvers	C1-DET-APRVR	Determine Approvers
C1-AdjustmentApproval Request	APPROVED	Enter	C1-FRZ-ADJ	Freeze Approved Adjustments	C1-FRZ-ADJ	Freeze Approved Adjustment(s)
C1-AdjustmentApproval Request	INPROG	Enter	C1-NTFY-APPR	Notify Approver	C1-NTFY-APPR	Notify Approver
C1-AdjustmentApproval Request	INPROG	Monitor	CM-APR-TMOUT	Check for Adjustment Approval Request Timeout	C1-APR-TMOUT	Adjustment Approval Request Timeout