



C2M v2.9

4.2.2.1 Update Billing Information

Creation Date: May 27, 2009
Last Updated: January 29, 2025

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Brief Description

| | |
|---------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Business Process: | 4.2.2.1 C2M.Update Billing Information |
| Process Type: | Sub Process |
| Parent Process: | 4.2.2 Manage Bill |
| Sibling Processes: | 4.2.2.2 C2M.Manage Meter Charges, 4.2.2.3 C2M.Manage Item Charges, 4.2.2.4 C2M.Manage External and Miscellaneous Charges, 4.2.2.5 C2M.Manage Loan Charges, 4.2.2.6 C2M.Manage Deposit Charges, 4.2.2.8 C2M.Manage Billing Disputes, 4.2.2.9 C2M.Manage Billing Inquires, 4.2.2.10a C2M.Manage Budget Billing, 4.2.2.10b C2M.Manage Monitored and Unmonitored Non-Billed Budget Billing, 4.2.2.12 C2M.Manage Payment Arrangement Charges, 4.2.2.14 C2M.Manage Off Cycle Bill for External and Miscellaneous Charges, 4.2.1.5 C2M.Maintain Measurements Schedule, 3.3.2.1 C2M.Start Premise Based Service, 3.3.2.3 C2M.Stop Premise Based Service, 3.3.2.2 C2M.Start Non-Premise Based Service, 3.3.2.4 C2M.Stop Non-Premise Based Service, |

This process describes adding or updating various required schedules for billing customers.

Scheduled [Bill Cycles](#) allow for billing of customers over a given time period. Each customer must have a [Bill Cycle](#). For example, some customers may be billed quarterly, some monthly, or some a specific date each month. Typically, customers with metered service have are billed shortly after the meter is read. The Bill Cycle corresponds to the Measurement Cycle. Changes to measurement cycles or measurement cycle schedules may impact associated Bill Cycles. The number of [Bill Cycles](#) is dependent on the frequency the organization bills customers. More than one Bill Cycle or group of customers can be billed at the same time using the C2M(CCB) Batch Billing background processes. The Authorized User responsible for input of this bill schedule information must be aware of other related business requirements, rules and considerations prior to entry of new schedule information or updates to existing schedules

[Bill Period](#) Schedules are used by non-metered Service Agreements when bill end dates need to fall on strict dates. If the organization has these Service Agreement types, coordination with Bill Cycle Schedules is also important.

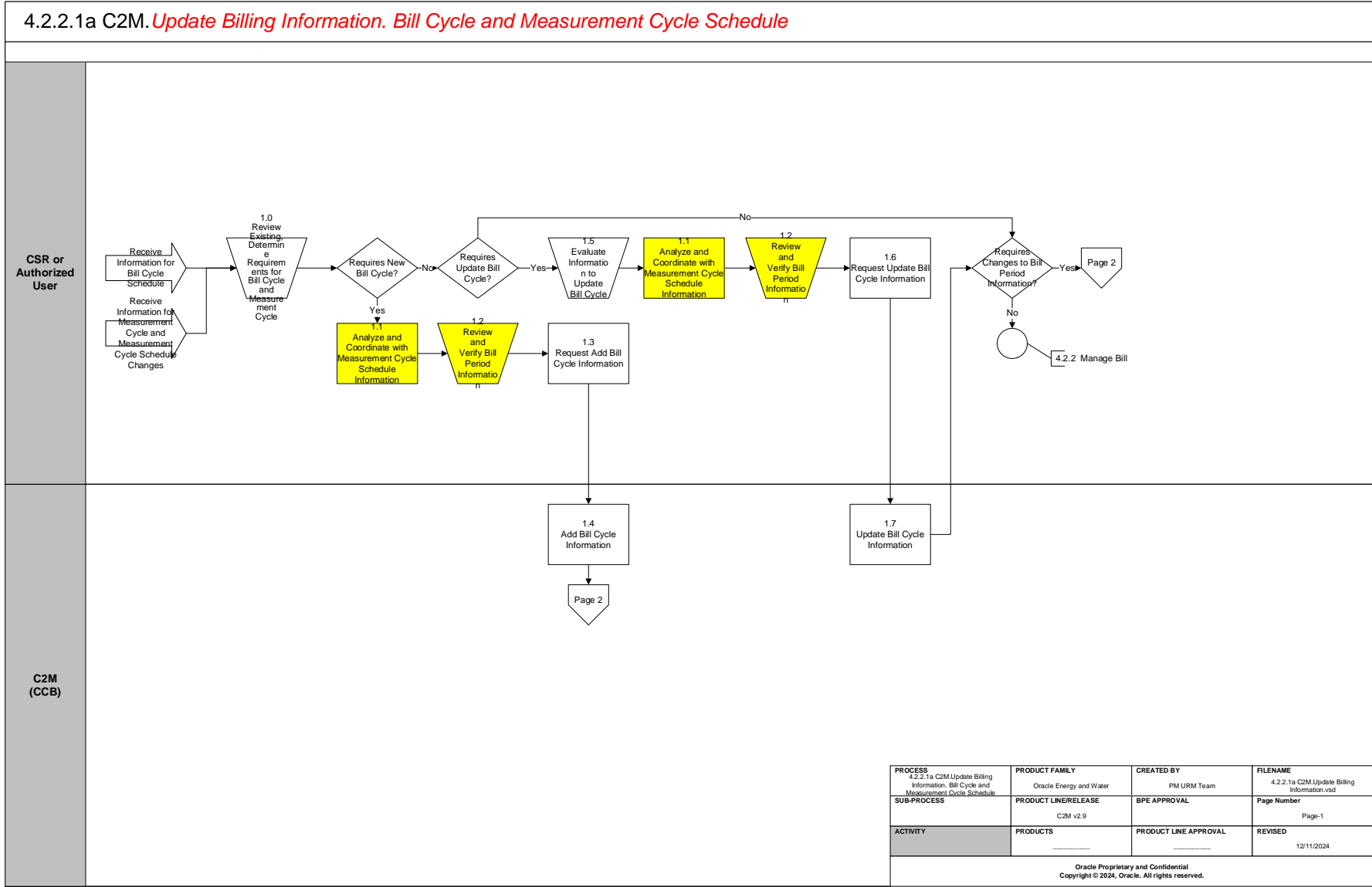
A Statement is a summary of Service Agreement billing information from one or multiple accounts. Some customers have individual offices that pay the regular bill, however a central office may require a consolidated report of the financial activity for one or more Accounts and/or Service Agreements. A [Statement Cycle](#) is needed to accommodate sending this consolidated report. The Statement Cycle has a similar purpose to that of a Bill Cycle. It controls when Statements will be produced. Separate, unique Statement Cycles can accommodate monthly, quarterly or other time periods.

Rate Schedules are also needed for billing the customer for various Service Agreement types. When a Rate is required, it controls:

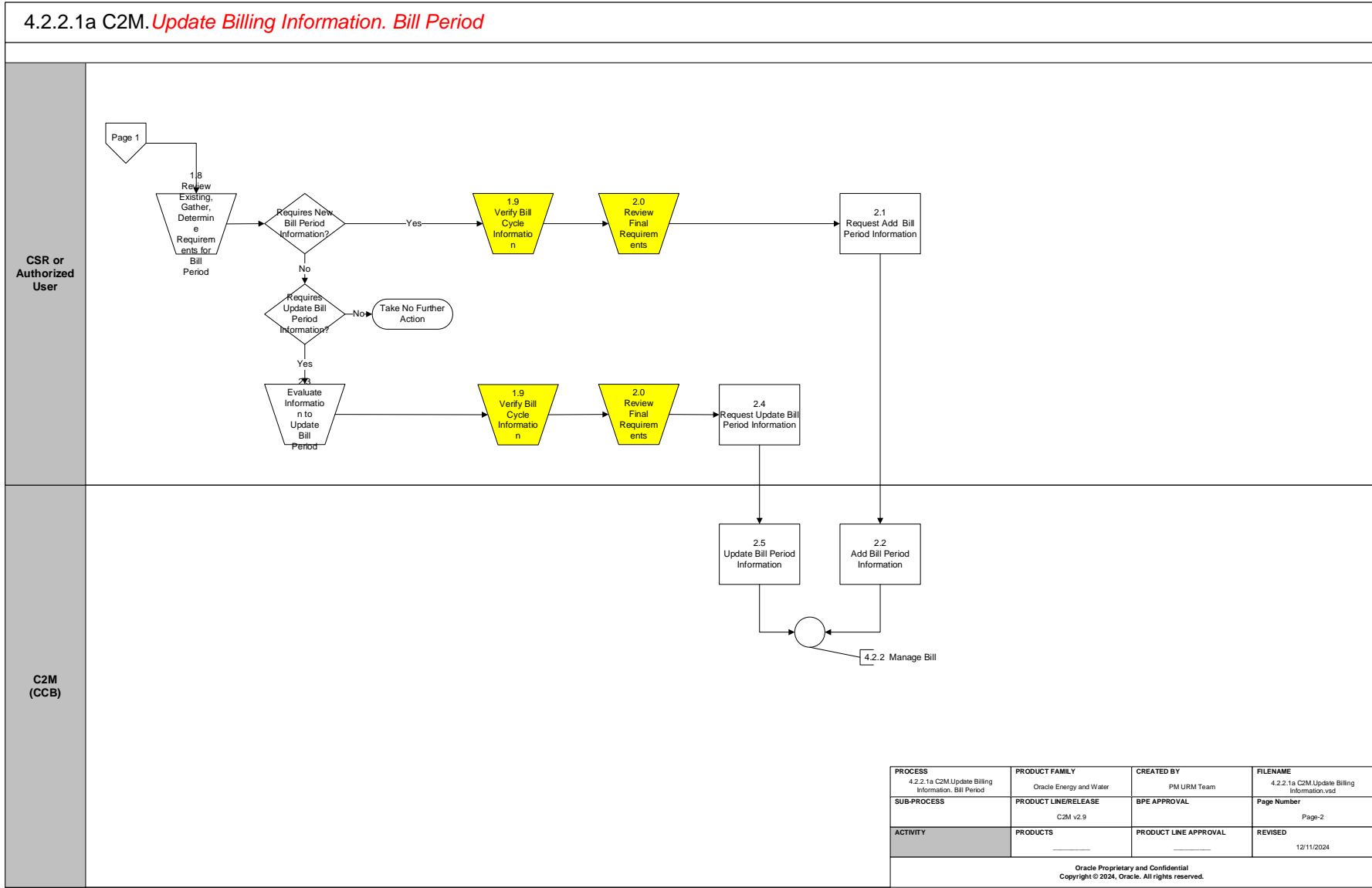
- How the service's charges are calculated.
- How the charges appear on the customer's bills.
- How the general ledger is impacted by the charges.

The process described here is a high level overview only as Rate Design is impacted by business rules and policies, service rules, and regulatory agencies.

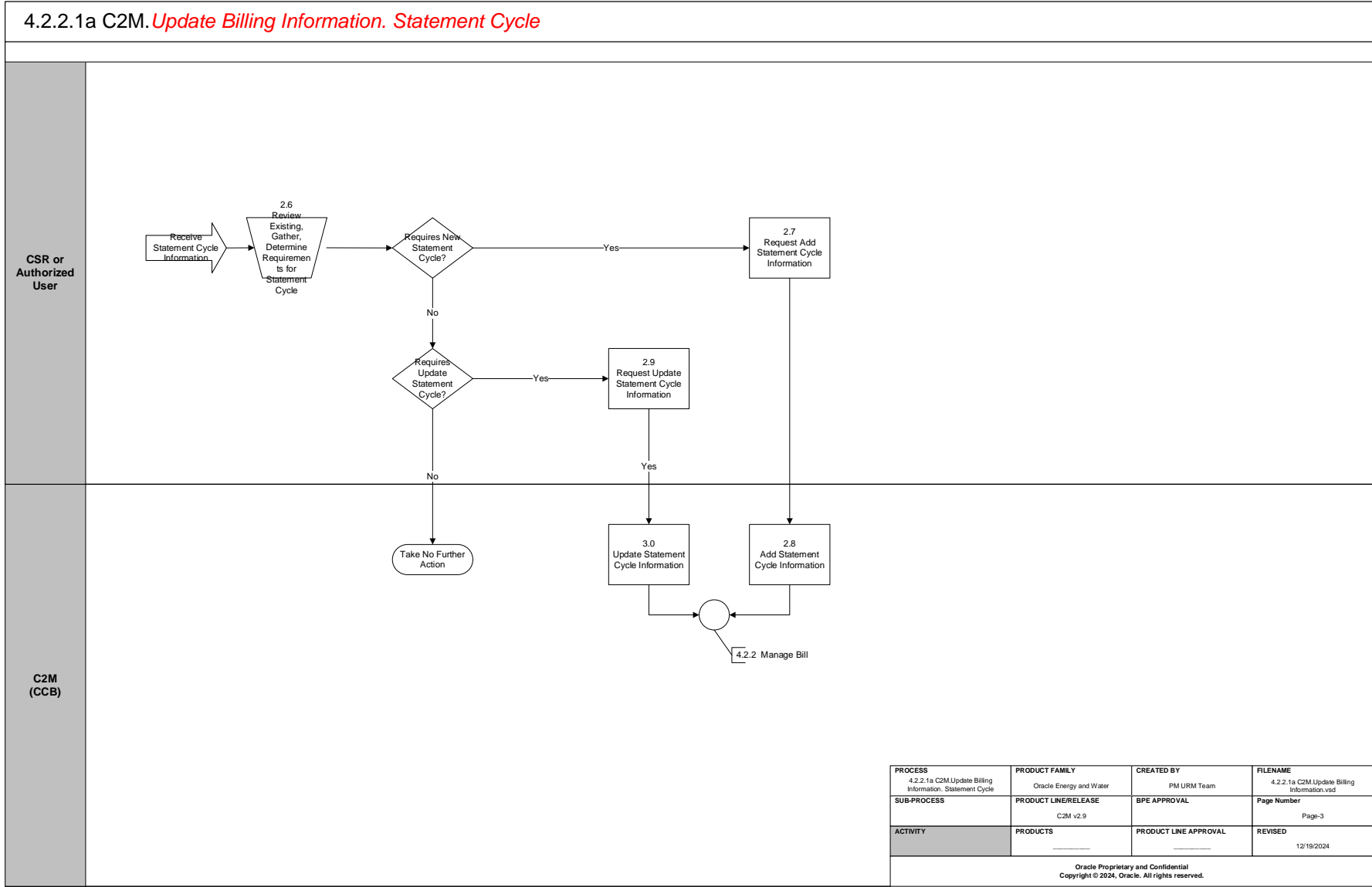
Business Process Model Page 1



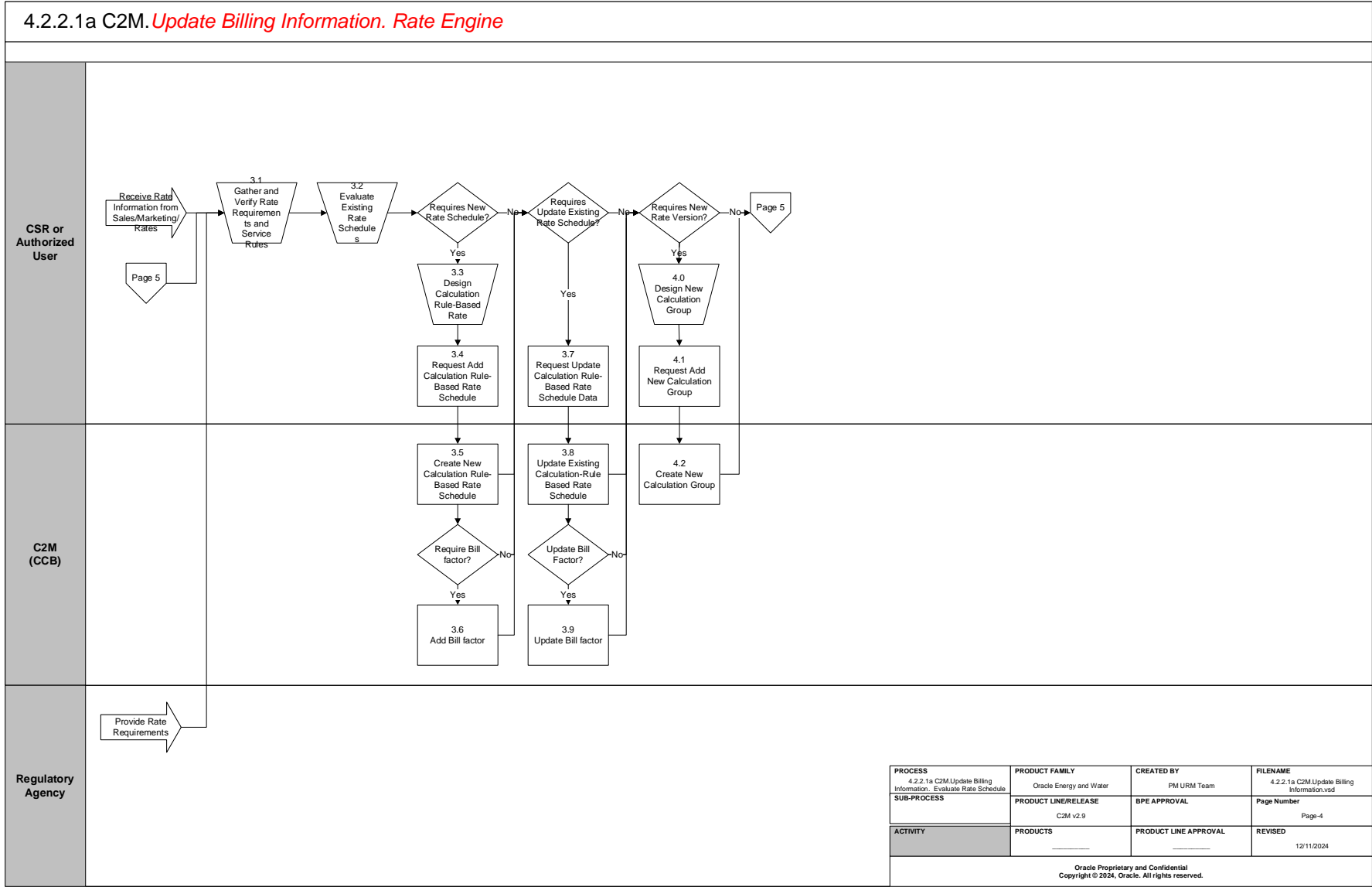
Business Process Model Page 2



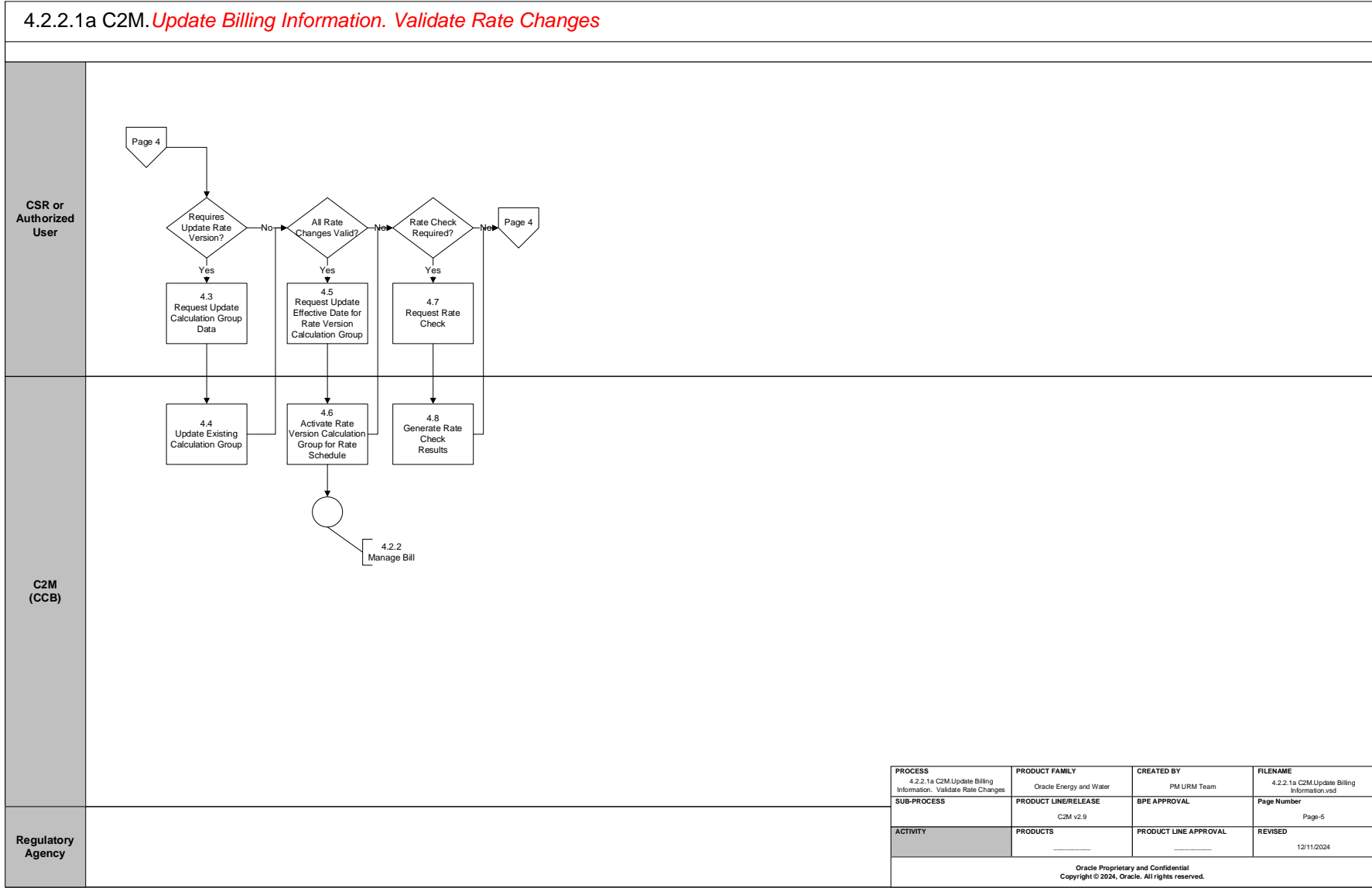
Business Process Model Page 3



Business Process Model Page 4



Business Process Model Page 5



Detail Business Process Model Description

1.0 Review Existing, Gather, Determine Requirements for Bill Cycle

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User is provided with [Bill Cycle](#) information. The CSR or Authorized User researches and collects necessary information for the new or updated Bill Cycle schedule. The following information is required.

- Window Start Date - Date C2M(CCB) begins to create bills for accounts in the Bill Cycle.
- Window End Date - Date C2M(CCB) finishes creating bills for accounts in the Bill Cycle. This is the last possible date an available meter read is loaded in C2M(CCB) for the account.
- Accounting Date - Financial date associated with the bills’ financial transaction. The accounting date defines the financial period(s) the bills are booked in the general ledger.
- Estimate Date - Date C2M(CCB) is allowed to start estimating consumption if a real read cannot be found. This date is blank if estimation is not allowed for the Bill Cycle date. When specified, this date is typically on or shortly before the window end date
- Freeze and Complete – Is enabled if the system should freeze and complete any Bills created without errors, otherwise all Bills created by the billing process will be left in the unfinished state.

Customizable process N

BILLING:

| |
|----------------------------------------------|
| BILLING – creates bills for open Bill Cycles |
|----------------------------------------------|

Configuration required Y

Entities to Configure:

| |
|-----------------------|
| Bill Cycle - Schedule |
|-----------------------|

1.1 Analyze and Coordinate with Measurement Cycle Schedule Information.

Actor/Role: CSR

Description:

There is analysis and coordination with the Service Schedule (Meter Read Schedule) Information. The CSR or Authorized User reviews and determines the optimum new Bill Cycle Schedule. The Bill Cycle’s first and last days for Billing must coordinate with Service Schedule’s Meter Read dates. [Bill Cycle is assigned to Accounts](#) and [Measurement Cycle to Service Points](#).

Configuration required Y

Entities to Configure:

| |
|--------------------------------------------|
| Bill Cycle – Schedule |
| Measurement Cycle Schedule |
| Measurement Cycle |

1.2 Review and Verify Bill Period Information

Actor/Role: CSR

Description:

There is coordination with the Bill Period Schedule to ensure all accounts are billed in a timely fashion.

Configuration required Y

Entities to Configure:

| |
|-----------------------|
| Bill Cycle - Schedule |
|-----------------------|

| |
|----------------------|
| Bill Period Schedule |
|----------------------|

1.3 Request Add Bill Cycle Information**Actor/Role:** CSR or Authorized User**Description:**

The Authorized User enters the Bill Cycle Schedule information in C2M(CCB).

1.4 Add Bill Cycle Information**Actor/Role:** C2M(CCB)**Description:**The [Bill Cycle](#) Schedule information is added in C2M(CCB).**Configuration required Y Entities to Configure:**

| |
|-----------------------|
| Bill Cycle - Schedule |
|-----------------------|

1.5 Evaluate Information to Update Bill Cycle**Actor/Role:** : CSR or Authorized User**Description:**The Authorized User evaluates and reviews current [Bill Cycle](#) Schedule information.**1.6 Request Update Bill Cycle Information****Actor/Role:** CSR or Authorized User**Description:**

The Authorized user makes changes and updates Bill Cycle Schedule information in C2M(CCB).

1.7 Update Bill Cycle Information**Actor/Role:** C2M(CCB)**Description:**

The Bill Cycle Schedule information is updated in C2M(CCB).

1.8 Review Existing, Gather, Determine Requirements for Bill Period**Actor/Role:** CSR or Authorized User**Description:**The Authorized User is provided with [Bill Period](#) information. The Authorized User researches and collects necessary information for the new or updated Bill Period schedule. For each Bill Period a Bill Date and Bill Segment End Date must be defined.**Configuration required Y Entities to Configure:**

| |
|---------------------------------------------------------|
| SA Type definition for Calendar Billing and Bill Period |
|---------------------------------------------------------|

| |
|----------------------|
| Bill Period Schedule |
|----------------------|

1.9 Verify Bill Cycle Information**Actor/Role:** Authorized User

Description:

The Authorized User verifies Bill Cycle Schedule information to ensure coordination with the Bill Cycle Schedule Window Dates.

2.0 Review Final Requirements

Actor/Role: CSR or Authorized User

Description:

All requirements are reviewed and confirmed.

2.1 Request Add Bill Period Information

Actor/Role: CSR or Authorized User

Description:

The Authorized User enters [Bill Period](#) Schedule information in C2M(CCB).

Configuration required Y Entities to Configure:

| |
|-----------------------|
| Bill Cycle - Schedule |
|-----------------------|

2.2 Add Bill Period Information

Actor/Role: C2M(CCB)

Description:

The [Bill Period](#) Schedule information is added in C2M(CCB).

Configuration required Y Entities to Configure:

| |
|-----------------------|
| Bill Cycle - Schedule |
|-----------------------|

2.3 Evaluate Information to Update Bill Period

Actor/Role: CSR or Authorized User

Description:

The Authorized User evaluates and reviews current Bill Period Schedule information.

Configuration required Y Entities to Configure:

| |
|----------------------|
| Bill Period Schedule |
|----------------------|

2.4 Request Update Bill Period Information

Actor/Role: : CSR or Authorized User

Description:

The Authorized User enters information to update the [Bill Period](#) Schedule information.

Configuration required Y Entities to Configure:

| |
|----------------------|
| Bill Period Schedule |
|----------------------|

2.5 Update Bill Period Information

Actor/Role: C2M(CCB)

Description:

The Bill Period Schedule information is updated in C2M(CCB).

Configuration required Y Entities to Configure:

| |
|----------------------|
| Bill Period Schedule |
|----------------------|

2.6 Review Existing, Gather and Determine Requirements for Statement Cycle

Actor/Role: : CSR or Authorized User Description:

The Authorized User is provided with Statement Cycle schedule information. The Authorized User reviews existing Statement Cycle schedule information. The Authorized User researches and collects necessary information to determine if a new or updated [Statement Cycle](#) schedule is needed. The number of Statement Cycles is determined by a combination of the frequency requirements and how many Statement Cycles with the same frequency.

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

| |
|---------------------------------------------------------------------------|
| STEX-TX - This algorithm is used to create extract records for Statements |
|---------------------------------------------------------------------------|

Customizable process N Create Statements:

| |
|----------------------------------------------------------------------------------------|
| STMPRD - This background process creates Statements according to a predefined schedule |
|----------------------------------------------------------------------------------------|

Configuration required Y Entities to Configure:

| |
|----------------------------|
| Statement Cycle - Schedule |
| Statement Route Type |
| Statement Construct |

2.7 Request Add Statement Cycle Information

Actor/Role: : CSR or Authorized User

Description:

The Authorized User enters the new [Statement Cycle](#) information in C2M(CCB).

2.8 Add Statement Cycle Information

Actor/Role: C2M(CCB)

Description:

The new [Statement Cycle](#) information is added in C2M(CCB).

2.9 Request Update Statement Cycle Information

Actor/Role: : CSR or Authorized User

Description:

The Authorized User enters any changes in C2M(CCB) for the given Statement Cycle.

3.0 Update Statement Cycle Information

Actor/Role: C2M(CCB)

Description:

The Statement Cycle is updated in C2M(CCB).

3.1 Gather and Verify Rate Requirements and Service Rules

Actor/Role: : CSR or Authorized User

Description:

The Authorized User collects various Rate requirements provided and reviews the existing Service Rules for the organization.

Note: In C2M(CCB) new rate engine is available and is referred to as Calculation Rule-Based rates. Calculation Rule-Based Rates (Rates) offer a flexible and reusable structure to calculate charges, centralize configuration, and reduce your development effort and time.

The Authorized User plans and prepares all the Rate Schedule requirements prior to entry in C2M(CCB). Market requirements, seasonal rate fluctuations, rate increases due to changes in the service rules are considered. Rates are structured as follows in C2M(CCB):

For the Calculation Rule-Based rates, the components are [Rate Schedule](#), [Calculation Group](#) and [Calculation Rules](#). [Bill Factors](#) are used to specify the amount to charge when the amount is the same for many Rates. This allows for greater flexibility and fewer changes when updates are required. The price may increase across many Rates however, it is only necessary to change the price on the Bill Factor. The change is then effective across applicable Rates. Applicable SA Types for the Rate must be defined. It is recommended to apply the changes first on a lower environment and then migrate to higher environments.

Configuration required Y Entities to Configure:

Master Configuration – Rate Engine Configuration

3.2 Evaluate Existing Rate Schedules

Actor/Role: : CSR or Authorized User

Description:

The Authorized User reviews various [Rate Schedules](#) to determine if an existing Rate Schedule meets needed requirements.

3.3 Design Calculation Rule-Based Rate Schedule

Actor/Role: : CSR or Authorized User

Description:

The [Rate Schedule](#) contains information about the Rate that doesn't change over time. This includes the Rate's regulatory name and description. A Rate's effective dated calculations are organized into Calculation Groups. Every Rate schedule has at least one Calculation Group. Multiple Calculation Groups exist when the effective dated calculations change, and it's important to keep the prior Calculation Group in order to recalculate historical bills.

A Calculation Group's calculations and charges are stored in [Calculation Rules](#). Every Calculation Group will have at least one Calculation Rule. The number of Calculation Rules linked to a Calculation Group is dependent on the complexity of the calculation rules.

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

[Calculation Rule-Based Rates - Algorithms to Configure](#)

Configuration required Y Entities to Configure:

[Calculation Rule-Based Rates - Entities to Configure](#)

3.4 Request Add Calculation Rule-Based Rate Schedule**Actor/Role:** : CSR or Authorized User**Description:**

Once designed, the Authorized User enters the new Rate Schedule information in C2M(CCB).

Process Plug-in enabled Y **Available Algorithm(s):**[Calculation Rule-Based Rates - Algorithms to Configure](#)**Configuration required Y** **Entities to Configure:**[Calculation Rule-Based Rates - Entities to Configure](#)**3.5 Create New Calculation Rule-Based Rate Schedule****Actor/Role:** C2M(CCB)**Description:**The new [Rate Schedule](#) information is added in C2M(CCB).**3.6 Add Bill Factor****Actor/Role:** C2M(CCB)**Description:**The new [Bill Factors](#) is added in C2M(CCB) and is linked to calculation rule. [Bill Factors](#) are used to specify the amount to charge when the amount is the same for many Rates. This allows for greater flexibility and fewer changes when updates are required.**3.7 Request Update Calculation Rule-Based Rate Schedule Data****Actor/Role:** Authorized User**Description:**

At times it may be necessary to update information in an existing Rate Schedule. It is important to consider how changes impact any historical rebilling. According to established business rules, the Authorized User enters updated Rate Schedule information as required.

Process Plug-in enabled Y **Available Algorithm(s):**[Calculation Rule-Based Rates - Algorithms to Configure](#)**Configuration required Y** **Entities to Configure:**[Calculation Rule-Based Rates - Entities to Configure](#)**3.8 Update Existing Calculation Rule-Based Rate Schedule****Actor/Role:** C2M(CCB)**Description:**

The existing Rate Schedule is updated in C2M(CCB).

3.9 Update Bill Factor**Actor/Role:** C2M(CCB)**Description:**

The existing [Bill Factors](#) is updated with latest values in C2M(CCB). Bill factor allows great flexibility and fewer changes when updates are required. The price may increase across many Rates however, it is only necessary to change the price on the Bill Factor. The change is then effective across applicable Rates.

4.0 Design New Calculation Group

Actor/Role: Authorized User

Description:

A Calculation Group’s calculations and charges are stored in [Calculation Rules](#). Every Calculation Group will have at least one Calculation Rule. The number of Calculation Rules linked to a Calculation Group is dependent on the complexity of the calculation rules.

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

Calculation Rule-Based Rates - Algorithms to Configure

Configuration required Y Entities to Configure:

Calculation Rule-Based Rates - Entities to Configure

4.1 Request Add New Calculation Group

Actor/Role : CSR or Authorized User

Description:

Once designed, the Authorized User enters new [Calculation Group](#) information in C2M(CCB).

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

Calculation Rule-Based Rates - Algorithms to Configure

Configuration required Y Entities to Configure:

Calculation Rule-Based Rates - Entities to Configure

4.2 Create New Calculation Group

Actor/Role: C2M(CCB)

Description:

The new [Calculation Group](#) information is added in C2M(CCB).

4.3 Request Update Calculation Group Data

Actor/Role : CSR or Authorized User

Description:

At times it may be necessary to update information for an existing [Calculation Group](#). It is important to consider how changes impact any historical rebilling. According to established business rules, the Authorized User enters updated Calculation Group information as required.

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

Calculation Rule-Based Rates - Algorithms to Configure

Configuration required Y Entities to Configure:

Calculation Rule-Based Rates - Entities to Configure

4.4 Update Existing Calculation Group

Actor/Role: C2M(CCB)

Description:

The Calculation Group is updated in C2M(CCB).

4.5 Request Update Effective Date for Rate Version Calculation Group

Actor/Role: CSR or Authorized User

Description:

The Authorized User activates the updated [Calculation Group](#) by adding the Rate Version Calculation Group with its effective date to the Rate Schedule. The Calculation Group is now available for use in C2M(CCB).

4.6 Activate Rate Version Calculation Group for Rate Schedule

Actor/Role: C2M(CCB)

Description:

The updated Calculation Group is present on the Rate Schedule in C2M(CCB).

4.7 Request Check Rate

Actor/Role : CSR or Authorized User

Description:

The Authorized User makes use of [Rate Check](#) functionality to verify the new or updated Rate Schedule for accuracy. The Rate can be tested using existing customer information for comparison.

4.8 Generate Rate Check Results

Actor/Role : CSR or Authorized User

Description:

The Authorized User makes use of [Rate Check](#) functionality to verify the new or updated Rate Schedule for accuracy. The Rate can be tested using existing customer information for comparison.

Test Assets related to the Current Process

| Testing Asset Sr.No | Use Case | No Of Data sets |
|------------------------|----------|--------------------|
| | | |
| | | |
| | | |

Document Control

Change Record

| Date | Author | Version | Change Reference |
|------------|-----------------|---------|-----------------------------------------------------------------------------------------------------------------------------------|
| 5/27/09 | Colleen King | | Created |
| 6/10/09 | Colleen King | | Updates from Review |
| 6/12/09 | Colleen King | | Updates from Review |
| 6/15/09 | Colleen King | | Updates from Review |
| 6/17/09 | Colleen King | | Updates form Review |
| 10/21/10 | Geir Hedman | | Updated Title and Content page |
| 10/22/10 | Yoko Iwahiro | | Update algorithms |
| 12/27/10 | Ayelet Lavee | | Release review. changed Visio version and some editing, Minor editing on document (siblings, hyperlinks) |
| 2/9/11 | Geir Hedman | | Updated Document and Visio |
| 8/19/13 | Mel Bachmeier | V2.4 | Updated Document and Visio |
| 09/12/13 | Galina Polonsky | | Reviewed, Approved |
| 08/25/15 | Jane Cuenco Tan | | Updated Document and Visio |
| 09/10/15 | Galina Polonsky | | Reviewed, Approved |
| 08/17/17 | Ekta Dua | | Updated Document and Visio to v2.6 |
| 10/04/17 | Jerry Chick | | Updated service cycle to measurement cycle and service cycle schedule to measurement cycle schedule in document and Visio diagram |
| 10/20/2017 | Galina Polonsky | | Reviewed, Approved |
| 6/3/2019 | Satya Kalavala | | Updated format for v2.7 |
| 06/19/2024 | Kunal Nerkar | | Updated Document and Visio for C2M v2.9 |
| 09/10/2024 | Pablo Siegrist | | Reviewed |
| 12/18/2024 | Galina Polonsky | | Reviewed, Approved |

Attachments:

Bill Cycle

Bill Cycle

Bookmark

Previous Item

Next Item

Duplicate

Delete

Clear

Save

Refresh

Main

Bill Cycle

M01

Description

Monthly bill cycle - day 1

CIS Division

| | | Window Start Date | Window End Date | Accounting Date | Estimate Date | Freeze and Complete |
|---|--|-------------------|-----------------|-----------------|---------------|-------------------------------------|
| + | | * 12-01-2020 | * 12-06-2020 | * 12-06-2020 | 12-06-2020 | <input checked="" type="checkbox"/> |
| + | | * 11-01-2020 | * 11-06-2020 | * 11-06-2020 | 11-06-2020 | <input checked="" type="checkbox"/> |
| + | | * 10-01-2020 | * 10-06-2020 | * 10-06-2020 | 10-06-2020 | <input checked="" type="checkbox"/> |
| + | | * 09-01-2020 | * 09-07-2020 | * 09-07-2020 | 09-07-2020 | <input checked="" type="checkbox"/> |
| + | | * 08-01-2020 | * 08-04-2020 | * 08-04-2020 | 08-04-2020 | <input checked="" type="checkbox"/> |
| + | | * 07-03-2020 | * 07-07-2020 | * 07-07-2020 | 07-07-2020 | <input checked="" type="checkbox"/> |
| + | | * 06-01-2020 | * 06-06-2020 | * 06-06-2020 | 06-06-2020 | <input checked="" type="checkbox"/> |
| + | | * 05-01-2020 | * 05-04-2020 | * 05-04-2020 | 05-04-2020 | <input checked="" type="checkbox"/> |
| + | | * 04-01-2020 | * 04-06-2020 | * 04-06-2020 | 04-06-2020 | <input checked="" type="checkbox"/> |

Measurement Cycle

Measurement Cycle

Add

Bookmark

Refresh

Main

Measurement Cycle

Main

Measurement Cycle

CYCLE01

Description

Read Cycle 01

Measurement Cycle

Schedule Business

Measurement Cycle Schedule

Object

Bill Cycles

Bill Cycle

Monthly bill cycle - day 1

Record Actions

Edit

Delete

Duplicate

Record Information

Business Object

Measurement Cycle

Measurement Cycle Route Business Objects

Measurement Cycle Route Business Object

Measurement Cycle Route

Measurement Cycle Route List

Add

| | Route | Description | Schedule Type | Edit | Duplicate | Delete |
|---|-----------|-------------|---------------|------|-----------|--------|
| 1 | ROUTE-100 | Route 100 | Customer Read | | | |
| 2 | ROUTE-110 | Route 110 | Customer Read | | | |
| 3 | ROUTE-120 | Route 120 | Customer Read | | | |

Page 1 of 1 (3 Records)

Measurement Cycle Schedule List

Add

| | Scheduled Selection Date | Expected Work Date | Edit | Duplicate | Delete |
|---|--------------------------|--------------------|------|-----------|--------|
| 1 | 12-30-2020 | 01-01-2021 | | | |

4.2.2.1 C2M.Update Billing Information

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Measurement Cycle Schedule

Measurement Cycle Schedule

Add

Bookmark

Refresh

Main

7

Read Cycle 01

06-28-2020

07-03-2020

Not pre-generated

8

Read Cycle 01

05-26-2020

06-01-2020

Not pre-generated

Measurement Cycle Schedule ⓘ

Main

Record Actions ⓘ

Measurement Cycle [Read Cycle 01](#)

Scheduled Selection Date 12-30-2020

Expected Work Date 01-01-2021

Delete Routes

Edit

Delete

Duplicate

Record Information

Business Object [Measurement Cycle Schedule](#)

Measurement Cycle Schedule Route ⓘ

| | Route | Description | Schedule Type | Schedule Status | Edit | Delete |
|---|-----------|-------------|---------------|-----------------|------|--------|
| 1 | ROUTE-100 | Route 100 | Customer Read | Pending | | |
| 2 | ROUTE-110 | Route 110 | Customer Read | Pending | | |
| 3 | ROUTE-120 | Route 120 | Customer Read | Pending | | |

Page 1 of 1 (3 Records)

Bill Cycle is Linked to Account

Account

Bookmark

Delete

Clear

Save

Refresh

Main

Auto Pay

Persons

Financial Balances

Bill Messages

C & C

Budget

Deposits

Characteristics

Alerts

Account Portal

Account

Adams,Bob, Residential, \$0.00

Account ID 9303522394 5

Set Up Date

01-01-2017

Currency Code

United States Dollars

Customer Class

Residential

Access Group

System Default

CIS Division

California

Protect CIS Division

☐

Management Group

Comment

Bill Cycle

Monthly bill cycle - day 1

Bill After

Protect Bill Cycle

☐

Bill Print Intercept

Mailing Premise ID

4854208037

100 Switch Back Road, Apt. 102, Fremont, CA, 94516

Protect Mailing Premise

☐

| | Debt Class | Current Balance | Payoff Balance |
|--|-----------------------|-----------------|----------------|
| | Non-billed Budget | \$0.00 | \$0.00 |
| | Standard utility debt | \$0.00 | \$0.00 |

Measurement Cycle is Linked to Service Points

Service Point: 100 Switch Back Road, Apt. 102, Fremont, CA, 94516 / Electric Residential / Electric / ER-100001...

AddSearchBookmarkRefresh

MainLog

Main

Information100 Switch Back Road, Apt. 102, Fremont, CA, 94516 / Electric Residential / Electric / ER-1000011 / Read Cycle 01, Route 120 / Active

Service Point TypeElectric Residential

StatusActive

In Service Date01-01-2017

Address100 Switch Back Road, Apt. 102, Fremont, CA, 94516, USA

Time ZoneUS Pacific Time

Source StatusConnected

Premise100 Switch Back Road, Apt. 102, Fremont, CA, 94516

Division

Geographic Latitude0.000000

Geographic Longitude0.000000

Main Contact

Distribution Network

Facility

Estimation Eligibility

Record Actions

EditDeleteDeactivate

Record Information

Life Support / Sensitive Load Information

Life Support / Sensitive LoadNot on life support

Field Information

OK To EnterFalse

KeyNo key at premise

Device Location

Device Location Details

Measurement Cycle

Measurement CycleRead Cycle 01

RouteRoute 120

Sequence301

Service Point Equipment

Bill Period

Bill Period

Main

Bill Period

BP01

Description

Month End Bill Segments

| | | Bill Date | Bill Seg End Date |
|---|--|----------------------------------------------|----------------------------------------------|
| + | | <div><div>*</div>07-01-2024<div></div></div> | <div><div>*</div>06-30-2024<div></div></div> |
| + | | <div><div>*</div>06-01-2024<div></div></div> | <div><div>*</div>05-31-2024<div></div></div> |
| + | | <div><div>*</div>05-01-2024<div></div></div> | <div><div>*</div>04-30-2024<div></div></div> |
| + | | <div><div>*</div>04-01-2024<div></div></div> | <div><div>*</div>03-31-2024<div></div></div> |
| + | | <div><div>*</div>03-01-2024<div></div></div> | <div><div>*</div>02-28-2024<div></div></div> |
| + | | <div><div>*</div>02-01-2024<div></div></div> | <div><div>*</div>01-31-2024<div></div></div> |
| + | | <div><div>*</div>01-01-2024<div></div></div> | <div><div>*</div>12-31-2023<div></div></div> |

Statement Cycle

Statement Cycle

Bookmark

Duplicate

Delete

Clear

Save

Refresh

Main

Statement Cycle

MEND

Description

Month End

| | | Processing Date | Status |
|---|--|-----------------|-------------|
| + | | * 12-31-2017 | * Pending |
| + | | * 11-30-2017 | * Pending |
| + | | * 10-31-2017 | * Pending |
| + | | * 09-30-2017 | * Pending |
| + | | * 08-31-2017 | * Pending |
| + | | * 07-31-2017 | * Pending |
| + | | * 06-30-2017 | * Pending |
| + | | * 05-31-2017 | * Completed |
| + | | * 04-30-2017 | * Completed |
| + | | * 03-31-2017 | * Completed |

Bill Factor

Bill Factor

Bookmark

Previous Item

Duplicate

Delete

Clear

Save

Refresh

Main

Bill Factor Characteristics

Bill Factor

STATETAX

Description

State Tax

Bill Factor Type

Regular

Currency Code

United States Dollars

Value Type

Percentage

Error If No Value

☒

Tax Exemption

☒

Value In Contract Term

☐

Contract Rider Applicability

☐

Allow RV Proration

☒

Rate Selection Date Algorithm

Use Sub SA Contract

☐

Terms of Service Usage

Check SA Only

Bill Factor - State Tax

BF Characteristic - CA California

BF Characteristic - FL Florida

BF Characteristic - GA Georgia

BF Characteristic - NY New York

BF Characteristic - OR Oregon

BF Characteristic - TX Texas

Calculation Rule-Based Rates - Various Rate Algorithms - Related Entities to Configure

| Entity | Business Object | | |
|------------------------------------------|---------------------|--|--|
| | | | |
| Master Configuration | | | |
| Rate Engine Configuration | C1-RateEngineConfig | | |
| | | | |
| BPA Script - Adjust Usage and Check Rate | C1-OvrInMain | | |
| | | | |
| External Communication Request Type | CI_MDM | | |

| | | | |
|----------------------------------------------------|--------------------------------|--|--|
| | | | |
| <i>Rate Schedule</i> | | | |
| Bundling Add BO for Rate Schedule | C1-RateScheduleBundlingBO | | |
| Rate Schedule | C1-RateScheduleV2 | | |
| Rate Schedule Lite | C1-RateScheduleLite | | |
| Physical BO for Rate Schedule | C1-RateSchedulePhysicalBO | | |
| | | | |
| <i>Calculation Group</i> | C1-CALC-GRP | | |
| Bundling Add BO for Calculation Group | C1-CalcGroupBundlingAddBO | | |
| Calculation Group | C1-CalcGroup | | |
| Physical BO for Calculation Group | C1-CalcGroupPhysicalBO | | |
| | | | |
| <i>Calculation Rule</i> | C1-CALC-RULE | | |
| Bundling Add BO for Calculation Rule | C1-CalcRuleBundlingAddBO | | |
| Calculation Rule Execution Resequencing | C1-CalcRuleExecReSeqLite | | |
| Execute Calculation Group | C1-CalcRuleReferredCalcGroup | | |
| Generic Calculation Rule | C1-GenericCalcRule | | |
| Physical BO for Calculation Rule | C1-CalcRulePhysicalBO | | |
| Apply To | C1-ApplyTo | | |
| Service Quantity | C1-ServiceQuantity | | |
| Stepped Service Quantity | C1-SteppedSQ | | |
| Summary | C1-Summary | | |
| Calculate Service Quantity | C1-CalculateServiceQuantity | | |
| Flat Charge | C1-FlatCharge | | |
| Calculate Final Reading Values | C1-CalculateFinalValue | | |
| Item Type | C1-ItemType | | |
| Math | C1-Math | | |
| Maximum Charge | C1-Maximum | | |
| Minimum Charge | C1-Minimum | | |
| Simple Summary | C1-SimpleSummary | | |
| Calc Line Distribution By Percentage | CI_CalcLinePercentDistribution | | |
| Calculation Rule Cleanup - Override Proration | C1-CalcRuleBoForDataCleanup | | |
| Calculation Rule Bill Print details | C1-CalcRuleBillPrintDetails | | |
| | | | |
| <i>Calculation Rule Eligibility Criteria</i> | C1-CALC-R-EL | | |
| Calculation Rule Eligibility Criteria | C1-CalcRuleEligibilityCriteria | | |
| Bundling Add BO for Calc Rule Eligibility Criteria | C1-CalcRuleElCrtBundlingAddBO | | |
| Physical BO for Calc Rule Elig Criteria | C1-CalcRuleElCrtPhysicalBO | | |

| | | | |
|----------------------------------------------------|-----------------------------|-------------------------------------------|---------------------|
| | | | |
| <i>Calculation Line Category Type</i> | <i>C1-CL-CAT</i> | | |
| Calc Line Category Type | C1-CalcLineCategoryType | | |
| Bundling Add BO for Calc Line Category Type | C1-CalcLineCatBundlingAddBO | | |
| Physical BO for Calc Line Category Type | C1-CalcLineCatPhysicalBO | | |
| | | | |
| <i>Algorithm Type</i> | <i>Algorithm Type Code</i> | <i>Algorithm Entity</i> | <i>Program Type</i> |
| Calculation Rule Sequence Validation | C1-CALCRLVAL | Business Object - Validation | Plug-In Script |
| Validate Calc Rule Eligibility Criteria | C1-VALCALCRT | Business Object - Validation | Plug-In Script |
| Validate Calculate Service Quantity Rule | C1-VALCALCSQ | Business Object - Validation | Plug-In Script |
| Validate Flat Charge Rule | C1-VAL-FC | Business Object - Validation | Plug-In Script |
| Validate Math Rule | C1-VAL-MATH | Business Object - Validation | Plug-In Script |
| Validate Service Quantity Rule | C1-VAL-SQ | Business Object - Validation | Plug-In Script |
| Validate Simple Summary Rule | C1-VAL-SSUM | Business Object - Validation | Plug-In Script |
| Validate Stepped SQ Rule | C1-VAL-STPSQ | Business Object - Validation | Plug-In Script |
| Validate Summary Rule | C1-VAL-SUMM | Business Object - Validation | Plug-In Script |
| Validate Final Reading Value Rule | C1-VALCALFNL | Business Object - Validation | Plug-In Script |
| Validate Item Type Rule | C1-VCRTMTYP | Business Object - Validation | Plug-In Script |
| Validate Maximum/Minimum Charge Rule | C1-VCRMNMX | Business Object - Validation | Plug-In Script |
| Validate Apply To Rule | C1-VLCRAPLTO | Business Object - Validation | Plug-In Script |
| Validate Calc Line Distribution Percentage | CI_VALDSTPER | Business Object - Validation | Plug-In Script |
| Calculate Final Reading Value | C1-CALCFNL | Calc Rule BO - Apply Calc Rule | Java |
| Calculate Service Quantity | C1-CALC-SQ | Calc Rule BO - Apply Calc Rule | Java |
| Execute Calculation Group | C1-ACALR-RFG | Calc Rule BO - Apply Calc Rule | Java |
| Apply To | C1-APPLYTO | Calc Rule BO - Apply Calc Rule | Java |
| Flat Charge | C1-FLAT-CHRG | Calc Rule BO - Apply Calc Rule | Java |
| Item Type | C1-ITEMTYPE | Calc Rule BO - Apply Calc Rule | Java |
| Math Rule | C1-MATH | Calc Rule BO - Apply Calc Rule | Java |
| Maximum Charge | C1-MAXIMUM | Calc Rule BO - Apply Calc Rule | Java |
| Minimum Charge | C1-MINIMUM | Calc Rule BO - Apply Calc Rule | Java |
| Simple Summary | C1-SIMP-SUMM | Calc Rule BO - Apply Calc Rule | Java |
| Service Quantity | C1-SQ | Calc Rule BO - Apply Calc Rule | Java |
| Stepped Service Quantity | C1-STPD-SQ | Calc Rule BO - Apply Calc Rule | Java |
| Summary | C1-SUMMARY | Calc Rule BO - Apply Calc Rule | Java |
| Calculate GL Details Given Percentage Distribution | CI_CALDSTPER | Calc Rule BO - Apply Calc Rule | Plug-In Script |
| Multiply Step by SQ | C1-MS-SQ | Calc Rule - Step Multiplier | Plug-In Script |
| No Proration | C1-NOPROR | Calc Rule BO - Override Proration Factors | Plug-In Script |

| | | | |
|------------------------------------------------------|--------------|-------------------------------------------|----------------|
| Evaluate Criteria Field - Apply Eligibility Criteria | C1-ECF-APCRT | Calc Rule Criteria BO - Apply Criteria | Java |
| Check if customer is on autopay | CI_CHK_APAY | Calc Rule Elig Criteria - Field Algorithm | Plug-In Script |
| Calculate SA Balance | CI_SABAL | Calculation Rule - Derive Value | Plug-In Script |
| Calculate days in billing period | C1-CALCBLDYS | Calculation Rule - Derive Value | Plug-In Script |
| Derive value given target category type/value | CI_GETCATAMT | Calculation Rule - Derive Value | Plug-In Script |
| Create bill segment using rate application | BSBS-RT | Bill Segment Type - Bill Segment Create | |
| Adjustment generation - apply rate | ADJG-RT | Adjustment Type - Generate Adjustment | |
| Bill Factor Rate Selection Date | C1-BFRDATE | Bill Factor - Rate Selection Date | |
| Month Based Processing | C1-MONTHPROC | Bill Factor - Rate Selection Date | |
| Retrieve Bill Accounting Date | C1-RETBACCDT | Bill Factor - Rate Selection Date | |

Calculation Rule-Based Rates – Rate Schedule

Rate Schedule: Flat Monthly Charge

Add

Search

Bookmark

Refresh

Main

Rate Schedule

Main

Rate Schedule

ERESFLAT

Description

Flat Monthly Charge

Detailed Description

Service Type

Electric

Frequency

Monthly

Currency Code

United States Dollars

Allow Estimates

Yes

Allow RV Proration

Yes

RV Selection Date

Pre-Processing Calculation Groups

Sequence

Description

Calculation Group

Rule Cross Reference

Rate Version Calculation Groups

Effective Date

Description On Bill

Calculation Group

Rule Cross Reference

01-01-2000

Flat Monthly Charge

Flat Monthly Charge

Add/Remove Links

Post-Processing Calculation Groups

Record Actions

Edit

Delete

Duplicate

Record Information

Bill Messages

Bill Message

Start Date

End Date

Calculation Rule-Based Rates – Calculation Group

Calculation Group: Flat Monthly Charge

Add

Search

Bookmark

Refresh

Main

Calculation Group

Main ⓘ

Calculation Group

ERESFLAT.V2000-01-01

Description

Flat Monthly Charge

Detailed Description

Record Actions ⓘ

Edit

Delete

Duplicate

Record Information

Calculation Rules List ⓘ

Add Rule

Re-sequence All Calculation Rules

⌵

⌵

⌵

| <input type="checkbox"/> | Sequence | Calculation Rule / Eligibility Criteria | Referenced Calculation Group ⓘ | Edit | Delete | Duplicate |
|--------------------------|----------|-----------------------------------------|--------------------------------|------|--------|-----------|
| <input type="checkbox"/> | 10 | Flat Monthly Charge | | | | |

Delete Calc Rules

Update Bill Print

Resequence Rules

Referencing Rate Schedule List ⓘ

⌵

⌵

| | Rate Schedule |
|---|---------------------|
| 1 | Flat Monthly Charge |

Calculation Rule-Based Rates – Calculation Rules

Calculation Rule: Flat Monthly Charge

Add

Search

Bookmark

Refresh

Main

Main ⓘ

Calculation Group

Flat Monthly Charge

Calculation Rule

ERESFLAT

Sequence

10

Business Object

Flat Charge ⓘ

Description

Flat Monthly Charge

Detailed Description

Description On Bill

Flat Monthly Charge

Print

Yes

Print if Zero

No

Rounding Type

Nearest

Precision

0.01

FCPO

No

Override Proration ⓘ

No

Execution Option ⓘ

Calculation Details ⓘ

Seasonal ⓘ

No

Value Type

Charge

Value Source

Value

Value

10.00000000

Record Actions ⓘ

Edit

Delete

Duplicate

Record Information

GL Distribution ⓘ

Distribution Code Source

Specific Distribution Code

Distribution Code

Revenue - Electric Residential

Cross Reference ⓘ

Characteristics ⓘ

Calculation Rule Eligibility Criteria Overview ⓘ

Add Eligibility Criteria ⓘ

4.2.2.1 C2M.Update Billing Information

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