



C2M v2.9

4.2.2.2 Manage Meter Charges

Creation Date: June 24, 2009
Last Updated: January 29, 2025

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Brief Description

Business Process:	4.2.2.2 C2M.Manage Meter Charges
Process Type:	Sub Process
Parent Process:	4.2.2 C2M.Manage Bill
Sibling Processes:	4.2.2.1 C2M.Calculate Usage, 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, 4.2.2.15 C2M.Manage Net Energy Metering Charges

This process describes Billing for Metered services. In C2M a “meter” is considered a device. A [Bill](#) is used to communicate financial obligations to the customer. The customer may have many services within an organization. The customer receives a Bill at regularly scheduled intervals for each established Account. The total amount owed, as well as financial and consumption details for each service, is placed on a Bill for expected payment within a specific time.

Most bills are automatically produced through Batch Billing without any user intervention. This document shows how bills are generated automatically through batch using the C2M solution. In addition, it also describes how bills can be manually created or modified, as required in the C2M solution. The C2M solution uses a term referred to as bill determinant. This refers to a usage request as explained in this process. These usage requests are created during the batch billing process, and when a user generates an online bill segment or performs cancel / rebill. The usage request is initiated and then follows a life cycle process to obtain the bill determinants (usage).

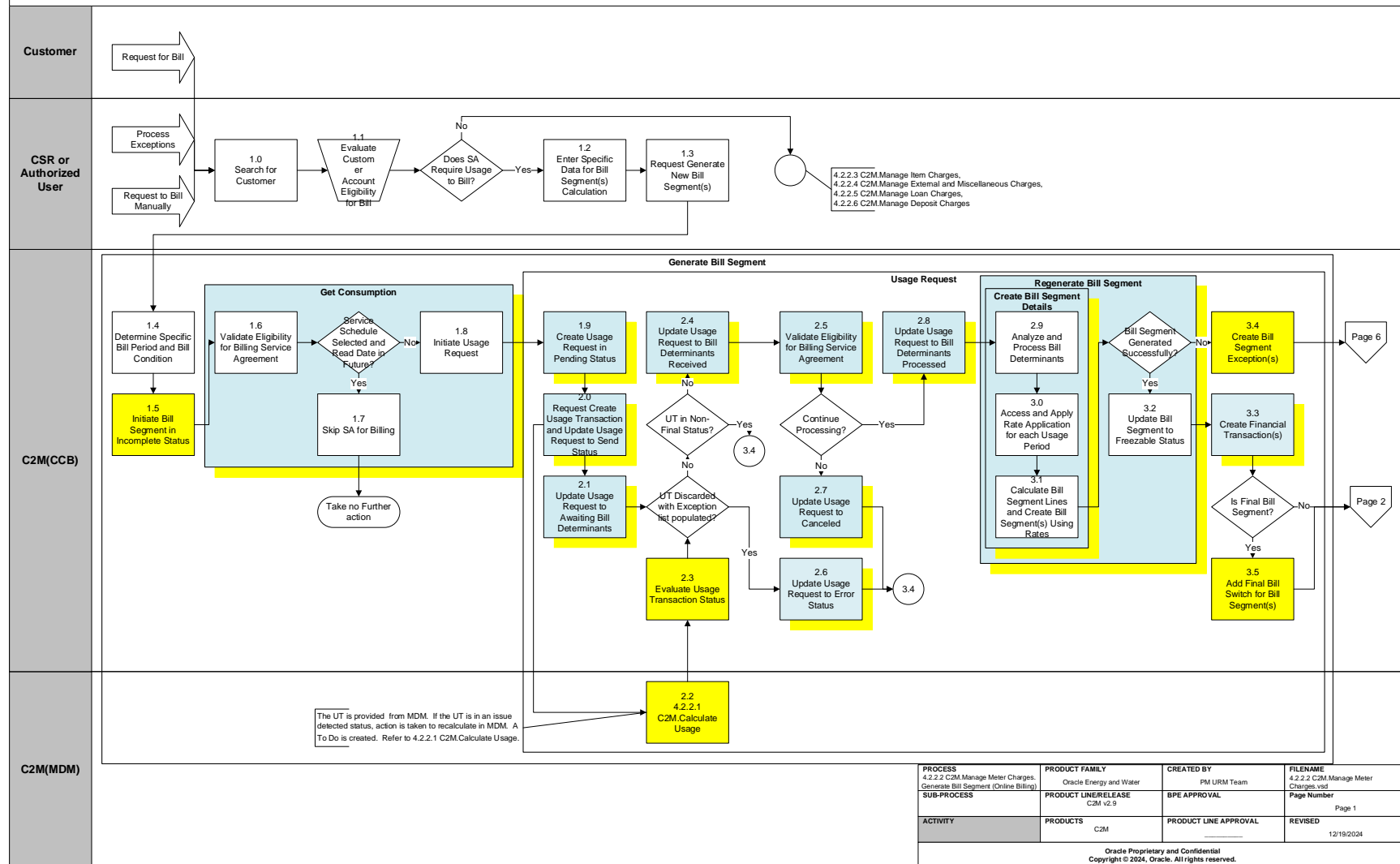
The Bill contains information about financial activity since the last time the customer was billed. The Bill will include information for Payments, Adjustments, and Bill corrections in addition to the current Bill information. The organization can communicate pertinent information to the customer using Bill messages. Bills will be sent to every person linked to the account designated to receive a copy of the Bill.

It is possible to rebill later if missing or inaccurate information is discovered.

The customer is responsible for payment by a given due date. If the Customer does not pay, the system can detect the overdue amounts and provide notification.

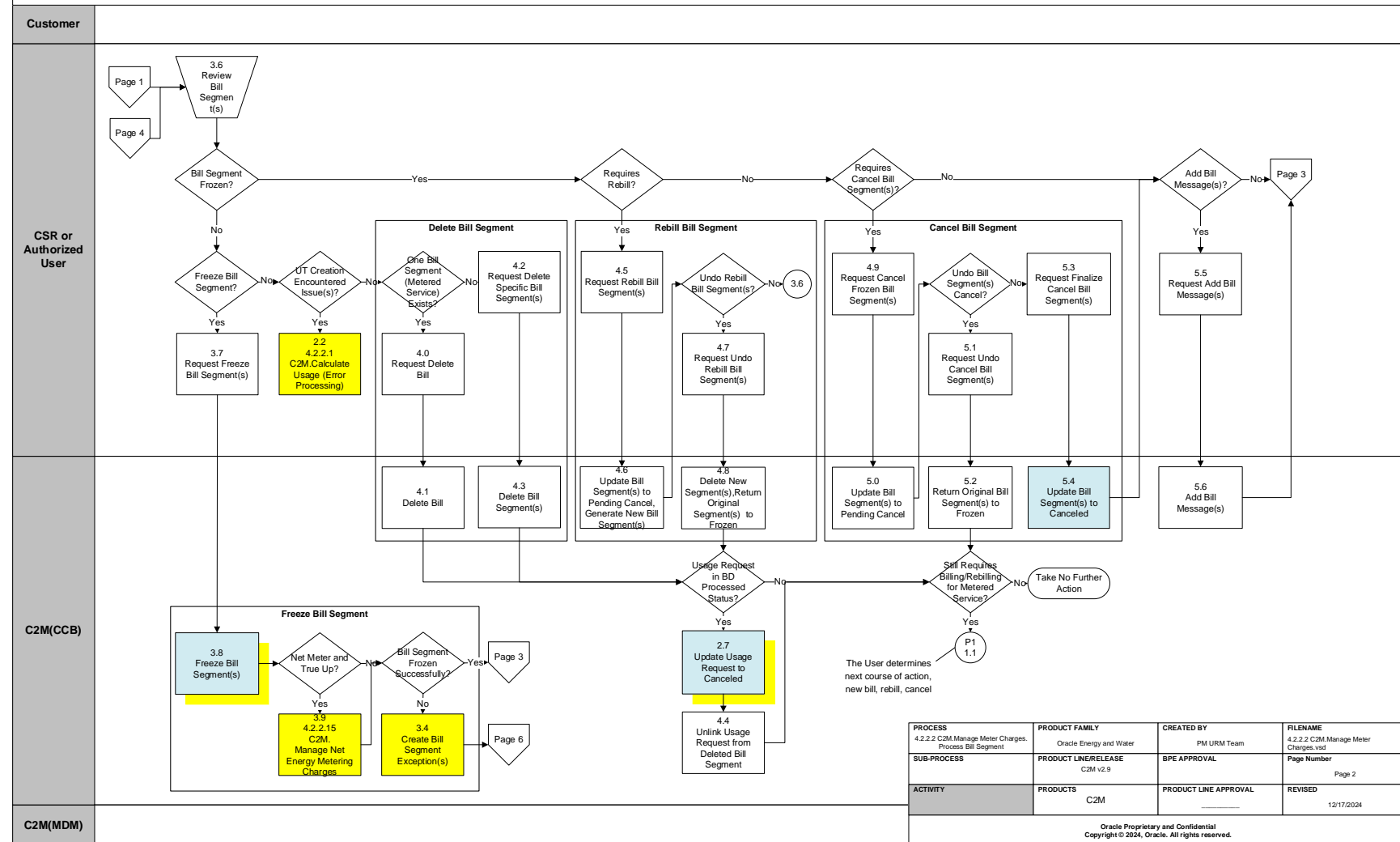
Business Process Model Page 1

4.2.2.2 C2M.Manage Meter Charges. Generate Bill Segment (Manual Billing)



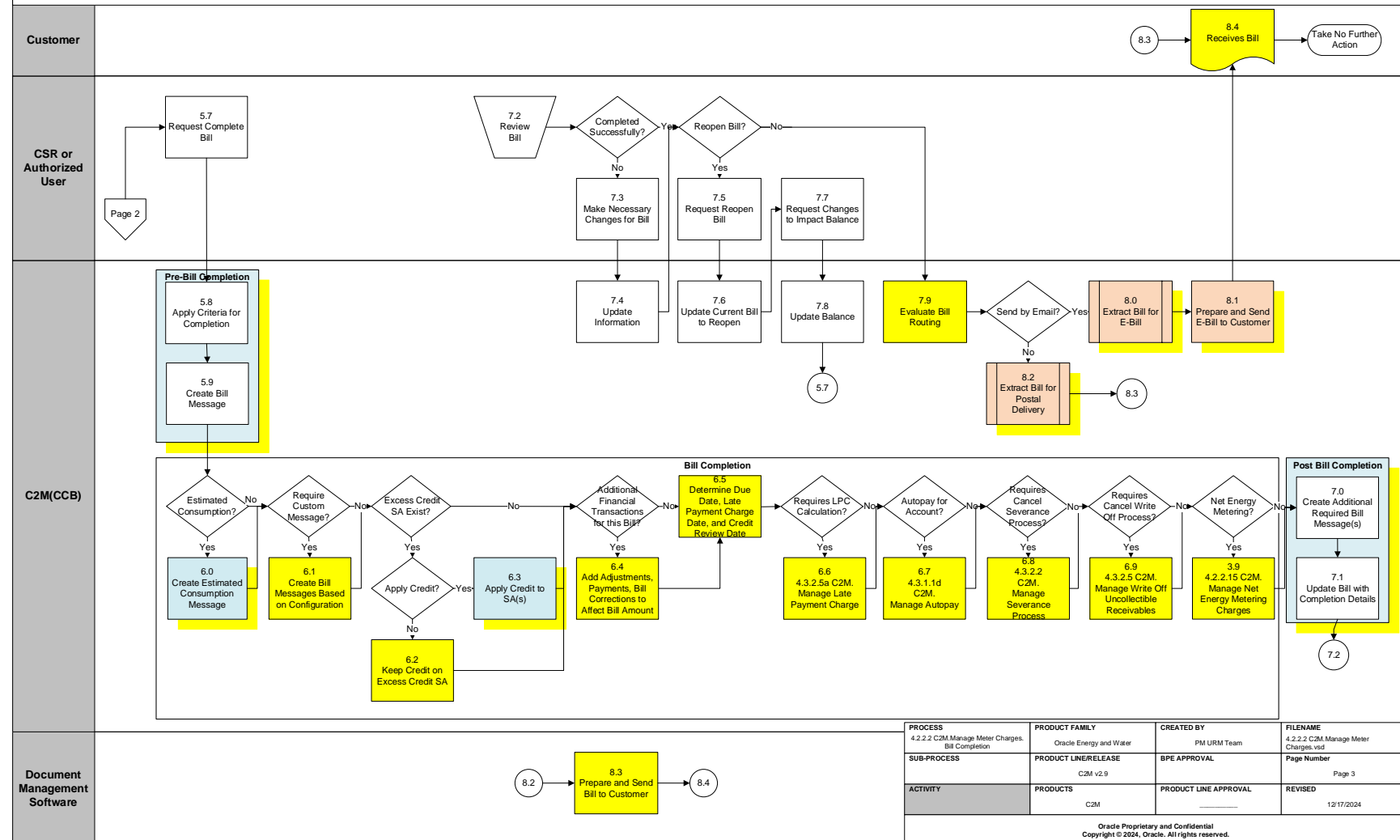
Business Process Model Page 2

4.2.2.2 C2M.Manage Meter Charges. Process Bill Segment



Business Process Model Page 3

4.2.2.2 C2M.Manage Meter Charges. Bill Completion



Customer

Schedule Batch Billing

Page 7

C2M(CCB)

Batch Billing

C2M(MDM)

Generate Bill Segment

C2M(CCB)

Usage Request

C2M(MDM)

Regenerate Bill Segment

C2M(CCB)

Create Bill Segment Details

C2M(MDM)

Update Bill Segment

C2M(CCB)

Is Final Bill Segment?

C2M(MDM)

Add Final Bill Switch for Bill Segment(s)

C2M(CCB)

Create Bill Segment Exception(s)

C2M(MDM)

Create Financial Transaction(s)

C2M(CCB)

Update Bill Segment to Freezable Status

C2M(MDM)

Calculate Bill Segment Lines and Create Bill Segment(s) Using Rates

C2M(CCB)

Access and Apply Rate Application for each Usage Period

C2M(MDM)

Analyze and Process Bill Determinants

C2M(CCB)

Update Usage Request to Bill Determinants Processed

C2M(MDM)

Validate Eligibility for Billing Service Agreement

C2M(CCB)

Update Usage Request to Bill Determinants Received

C2M(MDM)

Create Usage Request in Pending Status

C2M(CCB)

Request Create Usage Transaction and Update Usage Request to Send Status

C2M(MDM)

Update Usage Request to Awaiting Bill Determinants

C2M(CCB)

Update Usage Request to Error Status

C2M(MDM)

Evaluate Usage Transaction Status

C2M(CCB)

Skip SA for Billing

C2M(MDM)

Service Schedule Eligible?

C2M(CCB)

Validate Eligibility for Billing Service Agreement

C2M(MDM)

Initiate Usage Request

C2M(CCB)

Determine Bill Period, Consumption Period

C2M(MDM)

Check Eligibility for Batch Billing

C2M(CCB)

Select Accounts for Open Bill Cycle

C2M(MDM)

Initiate Bill Segment in Incomplete Status

C2M(CCB)

Incomplete Usage Request Exists?

C2M(MDM)

Take No Further Action

C2M(CCB)

Continue Processing?

C2M(MDM)

UT Discarded with Exception Not populated?

C2M(CCB)

UT in Non-Final Status?

C2M(MDM)

Bill Segment Generated Successfully?

C2M(CCB)

Is Final Bill Segment?

C2M(MDM)

Add Final Bill Switch for Bill Segment(s)

C2M(CCB)

Create Financial Transaction(s)

C2M(MDM)

Update Bill Segment to Freezable Status

C2M(CCB)

Calculate Bill Segment Lines and Create Bill Segment(s) Using Rates

C2M(MDM)

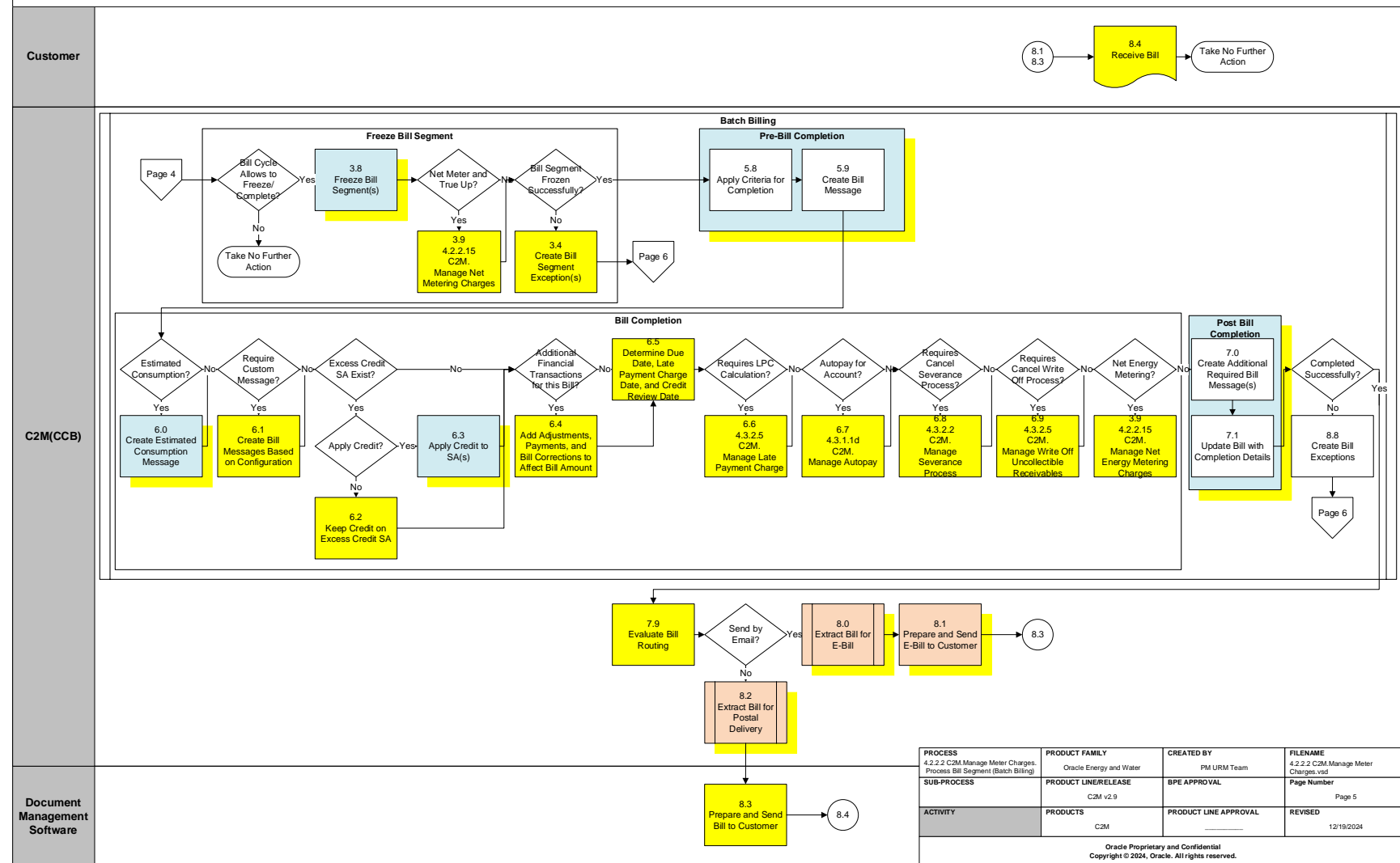
Access and Apply Rate Application for each Usage Period

C2M(CCB)

Analyze and Process Bill Determinants

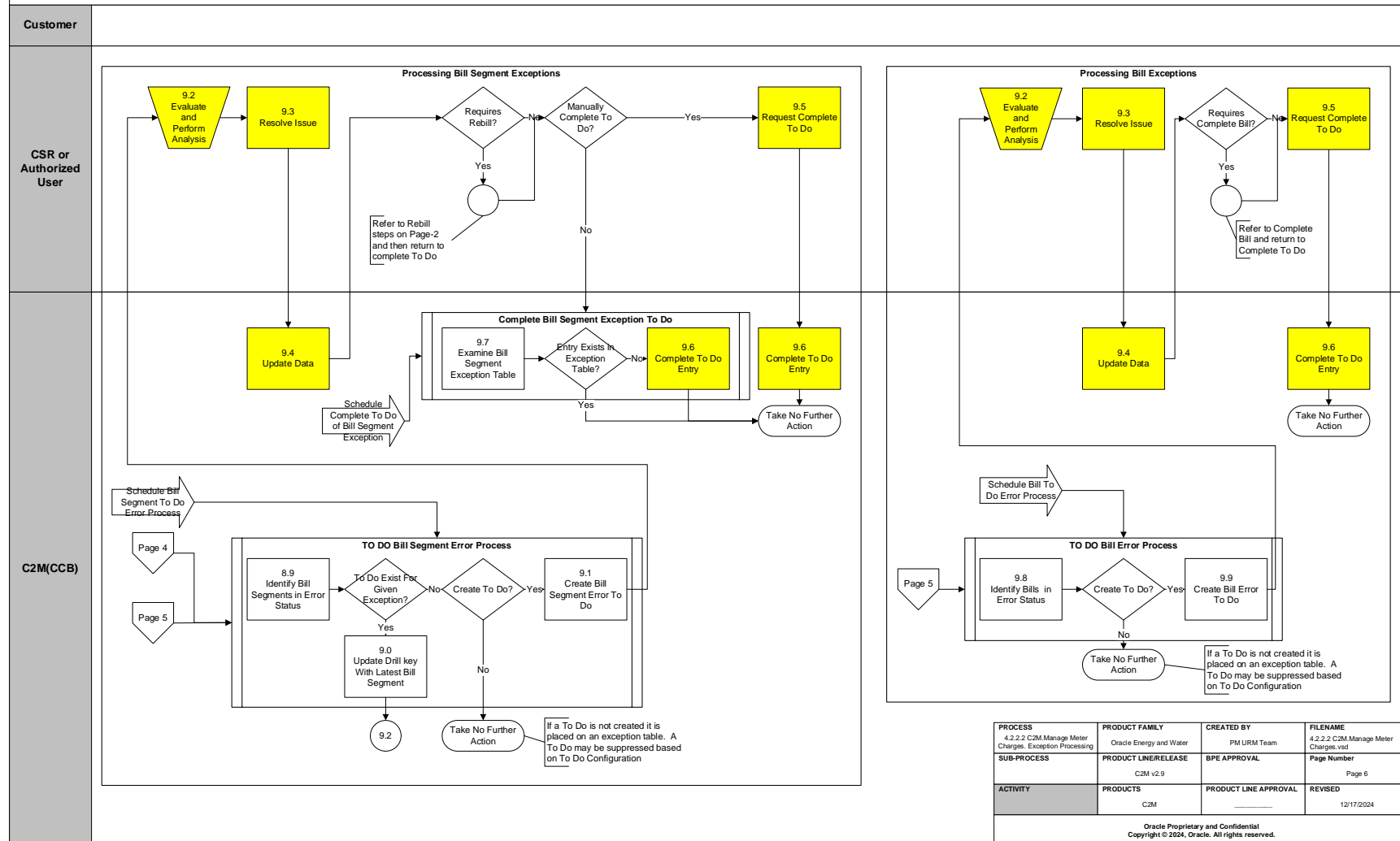
Business Process Model Page 5

4.2.2.2 C2M.Manage Meter Charges. Process Bill Segment (Batch Billing)



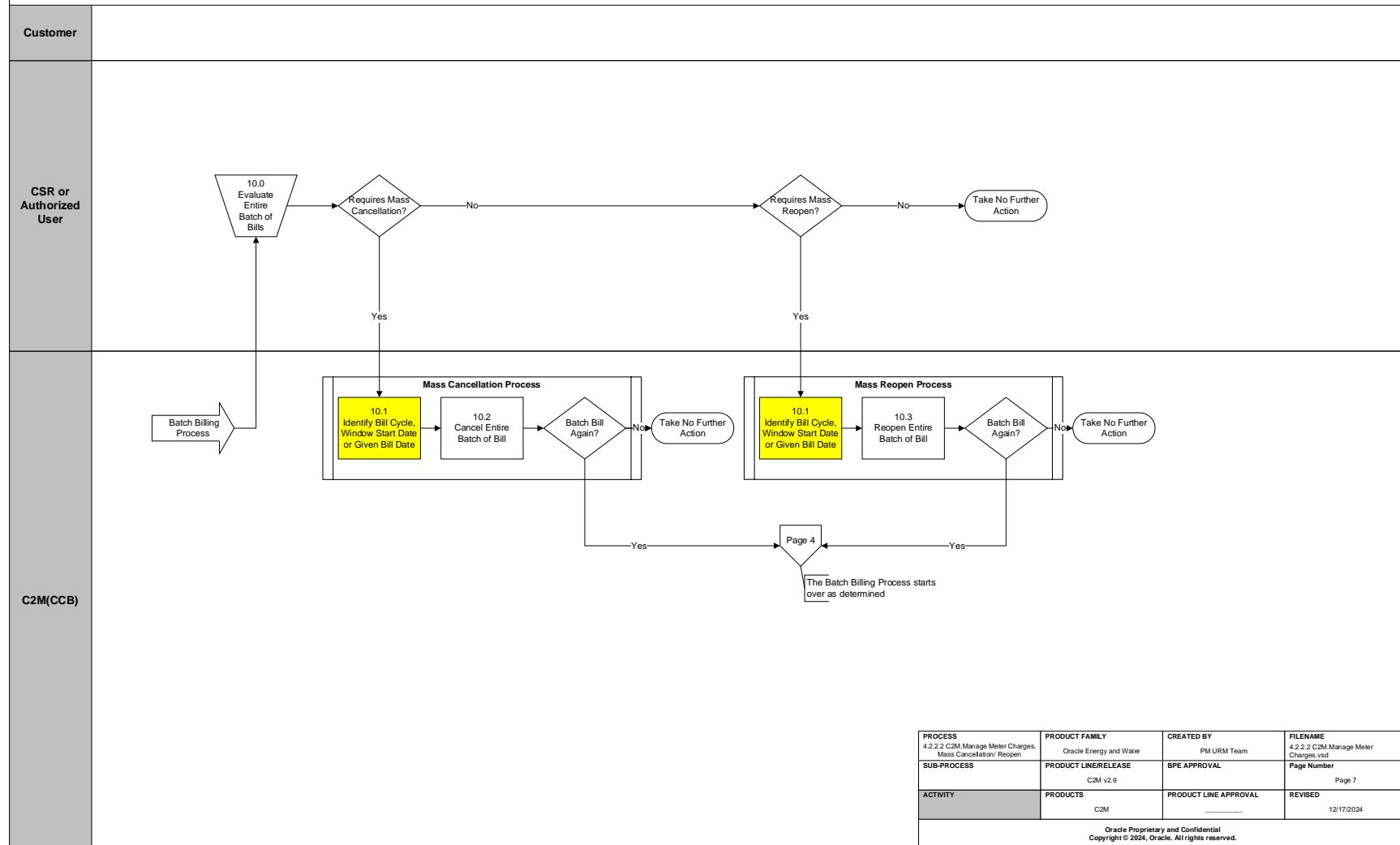
Business Process Model Page 6

4.2.2.2 C2M.Manage Meter Charges. Exception Processing



Business Process Model Page 7

4.2.2.2 C2M.Manage Meter Charges. Mass Cancellation/ Reopen



Detail Business Process Model Description

1.0 Search for Customer

Actor/Role: CSR or Authorized User

Description:

Upon receipt of request or inquiry for Billing, or while processing billing exceptions, the CSR or Authorized User accesses [Control Central Search](#) to locate the customer in C2M(CCB).

Configuration required Y Entities to Configure:

Installation Options

1.1 Evaluate Customer Account Eligibility for Bill

Actor/Role: CSR or Authorized User

Description:

C2M(CCB) provides the CSR or Authorized User with valuable insight and overall analysis of the Customer's financial situation. The CSR or Authorized User evaluates the Customer's Account. Account Financial History, Premise and Service Agreement Billing History, Credit Rating, and Credit and Collection History may be reviewed. In addition, the [360 view](#) provides Service Point, Device, Measuring Component Read Information, and Usage Subscription. [Control Central Alerts](#) and other [Dashboard](#) information assists the CSR or Authorized User in determining eligibility for adding new Bill or any rebilling based on established business rules.

Configuration required Y Entities to Configure:

Installation Options

1.2 Enter Specific Data for Bill Segment(s) Calculation

Actor/Role: CSR or Authorized User

Description:

If the CSR or Authorized User identifies a need to create a [Bill](#) for the customer, the CSR or Authorized User provides information about the Billing period for the bill to be created. The CSR or Authorized User must specify a Cutoff Date or Use Schedule to determine the end date of each Bill Segment Bill period. The Accounting Date defaults to current date however the CSR or Authorized User may change this date based on established business rules. The CSR or Authorized User may choose to allow for system estimation.

1.3 Request Generate New Bill Segment(s)

Actor/Role: CSR or Authorized User

Description:

The Manual billing process consists of several steps. The first step is to request system to calculate and create the Bill and Bill Segment. The CSR or Authorized User requests to generate a new online [Bill](#). This online Bill may contain one or more segments. If only one Service Agreement exists for the Account, then only one Bill Segment is created.

Note: The “Generate” function is used when creating a new Bill, Bill Segment, or re-generating an existing freezable or error segment. A deleted [Bill Segment](#) may be generated again once information is changed.

Note: The Billing Option selected when generating bill segments controls how the system retrieves meter reads that appear on the bill. Choose Use Cutoff Date if the meter reads must exist on the Cutoff Date. Choose Use Schedule if you want the service agreement's service point(s) measurement cycle schedule to control the meter reads that are used.

Customizable Process N Process Name

BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.

Configuration required Y Entities to Configure:

Bill Cycle

1.4 Determine Specific Bill Period and Bill Condition Group: Generate Bill Segment

Actor/Role: C2M(CCB)

Description:

C2M(CCB) determines the Bill Period boundaries.

Bill segments produced for a service agreement have two time periods:

- The bill segment period. The bill segment period defines the entire period of time covered by a bill segment's charges.
- The consumption period. The consumption period defines the period of time used to calculate the number of days for daily charges.

Bill Segment Start date:

- If this is the initial Bill Segment for the Service Agreement, the start date is set to the start date of the Service Agreement
- If this is not the initial Bill Segment for the Service Agreement, the start date is the previous Bill Segment's end date.

Bill Segment End Date

- If this is the last (final) Bill Segment for the Service Agreement, the end date is the Service Agreement's end date
- If this is not the last (final) Bill Segment for the Service Agreement, the Billing Option selected by the Authorized User determines how the end data is set. When Billing Option of Use Cutoff Date is selected, the end date is the specified Cutoff Date. When Billing Option of Use Schedule is selected, the end date is determined by available measurement data based on the Service Agreement's Service Point's measurement cycle.

The consumption period almost always starts one day after the bill segment period. The only time this true is the first bill segment that's produced for a new service agreement. This is because different utilities count the first day of a new service agreement differently than others. This is controlled by configuration of SA Type Initial Start Date Option.

The consumption period always ends on the bill segment's end date

The bill condition is noted on the Usage Request. Valid bill conditions are: initial, interim or final.

Note: The system ignores Service Points that are not billable, disconnected before the Bill period started, or are yet to be connected as of the Bill end date.

Customizable Process N Process Name

BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.

Configuration required Y Entities to Configure:

Bill Cycle
Frequency
Bill Segment Type and associated algorithms
Rates
SA Types

1.5 Initiate Bill Segment in Incomplete Status Group: Generate Bill Segment **Group: Batch Billing**

Actor/Role: C2M(CCB)

Description:

C2M(CCB) initiates the bill in an incomplete status. Typically, this status is not viewable to the Authorized User in an online scenario. In a specific exception process, the user may create a Bill and make use of functionality to save a bill segment in incomplete status. In this exception process, the user will be able to view the bill segment.

Customizable Process N Process Name

BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.

1.6 Validate Eligibility for Billing Service Agreement **Group: Get Consumption** **Group: Generate Bill Segment**

Group: Batch Billing**Actor/Role: C2M(CCB)****Description:**

The C2M(CCB) Bill Segment Type Get Consumption has specific logic for service agreements that require bill determinants from MDM.

The system checks if the SA should be skipped from billing by checking the MDM Next Scheduled Read Date characteristic on the Service Agreement. If this date is populated and is in the future, the SA will be skipped from billing.

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

C1-BSGC-USG - This Bill Segment Type Get Consumption algorithm should only be specified on bill segment types used for service agreements that require bill determinants from MDM.

Customizable process N Process Name

BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.

1.7 Skip SA for Billing Group: Get Consumption**Group: Generate Bill Segment****Group: Batch Billing****Actor/Role: C2M(CCB)****Description:**

The C2M(CCB) Bill Segment Type Get Consumption algorithm's logic is used for service agreements that require bill determinants from MDM.

The system checks if the SA should be skipped from billing by checking the MDM Next Scheduled Read Date characteristic on the Service Agreement. If this date is populated and is in the future, the SA will be skipped from billing.

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

C1-BSGC-USG - This Bill Segment Type Get Consumption algorithm should only be specified on bill segment types used for service agreements that require bill determinants from MDM.

Customizable process N Process Name

BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing

process creates a Bill for account when requested by an Authorized User.

1.8 Initiate Usage Request Group: Get Consumption

Group: Generate Bill Segment

Group: Batch Billing

Actor/Role: C2M(CCB)

Description:

The C2M(CCB) Bill Segment Type Get Consumption algorithm's logic is used for service agreements that require bill determinants from MDM. This logic initiates the Usage Request. If the Service Agreement was not skipped for billing, the usage request business object is initiated.

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

C1-BSGC-USG - This Bill Segment Type Get Consumption algorithm should only be specified on bill segment types used for service agreements that require bill determinants from MDM.

Customizable process N Process Name

BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.

1.9 Create Usage Request in 'Pending' Status Group: Usage Request

Group: Generate Bill Segment

Group: Batch Billing

Actor/Role: C2M(CCB)

Description:

C2M(CCB) creates a new [Usage Request](#) linked to the current bill segment being created or reprocessed.

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

F1-TRN-DF-NS - Generic Business Object Status Monitor - This algorithm type transitions business object current state to the input Next Status or to the status related to the input Next Transition Condition.

Customizable process N Process Name

BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing

		process creates a Bill for account when requested by an Authorized User.
Business Object Exist	Business Object	<div data-bbox="932 293 1579 521">The Parent Business Object as well as the two associated Child Business Objects are listed here for applicable Usage Request Statuses. Algorithms defined in the Business Object are shown at the applicable lifecycle status. Separate Business Objects are defined for Batch Billing (cyclical) and Online (non-cyclical).</div> <div data-bbox="932 521 1579 591">X1-UsageRequest - Usage Request - This business object defines the behavior of a usage request.</div> <div data-bbox="932 591 1579 724">X1-UsageRequestCyclical - Cyclical Billing Usage Request - This business object defines the behavior of a usage request created from the cyclical or batch billing process.</div> <div data-bbox="932 724 1579 857">X1-UsageRequestNonCyclical - Non-Cyclical Billing Usage Request - This business object defines the behavior of a usage request created from non-cyclical or online bill generation.</div>
<u>2.0 Request Create Usage Transaction and Update Usage Request to Send Status Group: Batch Billing</u> <u>Group: Generate Bill Segment</u> <u>Group: Usage Request</u>		
Actor/Role: C2M(CCB) Description:		
The Usage Request information is provided for MDM to create the Usage Transaction. The Usage Request is updated to a Send Status.		
Process Plug-in enabled Y Available Algorithm(s):		
Customizable process N		<div data-bbox="932 1149 1579 1279">F1-TRN-DF-NS - Generic Business Object Status Monitor - This algorithm transitions business object current state to the input Next Status or to the status related to the input Next Transition Condition.</div> <div data-bbox="932 1279 1579 1344">X1-SENDUSGR - This algorithm creates the usage transaction.</div>
Process Name		BILLING - The Bill cycle Batch processing creates Bills

for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.

2.1 Update Usage Request to Awaiting Bill Determinants Group: Batch Billing

Group: Generate Bill Segment

Group: Usage Request

Actor/Role: C2M(CCB)

Description:

C2M(CCB) transitions the Usage Request to 'Awaiting Bill Determinants' status, waits for the usage to be processed by C2M(MDM) and monitors for next status.

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

X1-UPDURFRUT - This algorithm updates the usage request based on the response of the MDM Usage Transaction.

Customizable process N Process Name

BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.

2.2 4.2.2.1 C2M Calculate Usage Group: Batch Billing

Group: Generate Bill Segment

Actor/Role: C2M(MDM)

Description:

C2M(MDM) processes the usage request from C2M(CCB) and calculates the usage for use in billing. If the Usage Transaction is in an 'Issue Detected' status, a To Do is created and action is taken to recalculate in MDM.

Refer to 4.2.2.1 C2M.Calculate Usage for calculation logic.

2.3 Evaluate Usage Transaction Status Group: Batch Billing

Group: Generate Bill Segment

Group: Usage Request

Actor/Role: C2M(CCB)

Description:

C2M(CCB) evaluates the Usage Transaction from C2M(MDM) and determines the next status to transition the Usage Request.

Customizable Process N**Process Name**

BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.

2.4 Update Usage Request to Bill Determinants Received Group: Batch Billing**Group: Generate Bill Segment****Group: Usage Request****Actor/Role: C2M(CCB)****Description:**

If no exceptions were encountered and C2M(MDM) has successfully returned a calculated usage, C2M(CCB) sets the status of the Usage Request to 'Bill Determinants Received'.

Note: A “summary” account refers to an account with service agreements related to more than one premise. If these premises are linked to service points that span different measurement cycle routes scheduled for reading on different dates, there’s no guarantee that all the account’s SAs will be billed at the same time.

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

F1-TRN-DF-NS - Generic Business Object Status Monitor - This algorithm transitions business object current state to the input Next Status or to the status related to the input Next Transition Condition.

C1-CURUBSKSA - This algorithm processes skip information from the usage response. If the usage response indicates that a usage request’s SA should be skipped, this algorithm performs the following:

- Update next read date schedule on SA characteristic
- Update bill segment exception indicating that usage request was canceled because SA was skipped.
- Cancel the usage request

An SA may be skipped from billing if it belongs to a summary billed account (i.e. an account with SAs that cover multiple premises). If the premises are linked to SPs that span different measurement cycle routes scheduled for reading on different dates, there is no guarantee that all the account's SAs will be billed at

Customizable process N	Process Name	the same time. If MDM detects that one of the account's SAs should be skipped, it returns this information along with the next read date schedule as part of the usage response.
		C1-CHK-MBDAY - This algorithm checks if the minimum bill days of the SA Type of the SA related to the non-closing usage request is violated. If it is violated, the usage request will be canceled, the SA Skip flag of the usage request will be set to true, and the bill segment exception will be updated with an error message indicating the reason for skipping.
		C1-MAXESTBSG - This algorithm checks if the maximum number of consecutive estimated bill segments would be exceeded if the estimated usage request is used to generate the bill segment. If so, the usage request is canceled and the linked bill segment is updated with an exception.
Configuration required Y	Entities to Configure:	BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.
		SA Type Characteristic C1-MXEST - The maximum number of consecutive estimated bill segments may vary for each SA Type. This value is stored in the C1-MXEST SA Type characteristic. A value of zero would indicate that no checking for estimated bill segments will be performed.

2.5 Validate Eligibility for Billing Service Agreement Group: Batch Billing

Group: Generate Bill Segment

Group: Usage Request

Actor/Role: C2M(CCB)

Description:

C2M(CCB) determines if the Usage Request is eligible to transition to the next status. The process also checks for sub usage requests. In this state, C2M(CCB) checks if the SA should be skipped for billing, due to Summary billing, if the minimum number of days have been reached for billing, and if the maximum number of estimates has already been reached.

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

See algorithm descriptions process Update Usage Request to Bill Determinants Received above.

Customizable process N Process Name

BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.

2.6 Update Usage Request to Error Status Group: Batch Billing
 Group: Generate Bill Segment
 Group: Usage Request

Actor/Role: C2M(CCB)

Description:

C2M(CCB) updates the Usage Request to 'Error' status if the MDM Usage Transaction cannot be provided, is discarded and an exception list is populated. If an error is encountered, this will trigger a creation of the bill segment exception.

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

X1-UPDBSEXCP - Update BS Exception from Usage

Customizable process N Process Name

BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.

2.7 Update Usage Request to Canceled Group: Generate Bill Segment
 Group: Usage Request
 Group: Batch Billing

Actor/Role: C2M(CCB)

Description:

C2M(CCB) checks if there is a pending Usage Request linked to the bill being processed (for online it implies that a user is regenerating the bill segment). If found, the existing usage request is canceled. If Update Usage Request to Canceled, from online billing, that usage request is in incomplete status and a new usage request needs to be initiated.

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

Note: There are currently no base algorithms available for this Business Object plug in spot.

Customizable process N Process Name

BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.

2.8 Update Usage Request to Bill Determinants Processed Group: Batch Billing

Group: Generate Bill Segment

Group: Usage Request

Actor/Role: C2M(CCB)

Description:

C2M(CCB) updates the usage request with status of 'Bill Determinants Processed' if the usage transaction was not skipped in C2M(MDM) and is not in error.

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

X1-USG-BTBS - Regenerate Batch Bill Segment

X1-USG-ONBS - Regenerate Online Bill Segment

X1-FRZRBLBS - Freeze Rebill Bill Segment

X1-TRNRELPPB - Transition Related PPB

Customizable process N Process Name

BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.

2.9 Analyze and Process Bill Determinants Group: Generate Bill Segment

Group: Create Bill Segment Details

Group: Batch Billing

Group: Regenerate Bill Segment

Actor/Role: C2M(CCB)

Description:

The Bill Determinant (usage) information is passed along to analyze and process the bill determinant information and prepare for calculating the bill segment details.

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

C1-BSBS-UR - This bill segment creation algorithm creates a bill segment for a service agreement that requires bill determinants

Customizable process N **Process Name**

BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.

3.0 Access and Apply Rate Application for each Usage Period Group: Generate Bill Segment
Group: Create Bill Segment Details
Group: Batch Billing
Group: Regenerate Bill Segment

Actor/Role: C2M(CCB)

Description:

This bill segment creation algorithm creates a bill segment for a service agreement that requires bill determinants from a meter data management system.

The algorithm finds the usage request linked to the bill segment in the bill determinants received state. It retrieves the usage period's list that contains an entry for each usage period that MDM calculated bill determinants for. Rate application is called for each entry in the usage period list; the usage period and bill determinants are passed to rate application.

Note the following about the resultant bill segment:

- A separate bill segment calculation header is created for each usage period in the list. Each calculation header reflects the consumption period used.
- Both the usage period and the SP usage period list entries will be stored as 'Service Quantity' records in the bill segment Calculation/Audit Usage Details.
- The usage period returned by MDM is also captured on the bill segment.
- If any reads details are found on the usage request, these are stored as 'Calculation/Audit Read Details' records.
- After all usage period list entries have been processed; the system accumulates the bill determinants and stores these in the bill segment SQ collection for informational purposes.

Process Plug-in enabled Y	Available Algorithm(s):	C1-BSBS-UR - This bill segment creation algorithm creates a bill segment for a service agreement that requires bill determinants.
Customizable process N	Process Name	BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.
Configuration required Y	Entities to Configure:	<div>Rates</div> <div>Note:</div> <div>- The following calculation rules have an indicator on whether to be executed only once for the entire usage period or for every usage period: Apply To, - Summary, Calculate Service Quantity.</div> <div>- The Calculate Usage Days Derive Value algorithm has an option whether to return the number of days based on consumption/per usage period or the total usage consumption period.</div> <div>SA Type</div> <div>Bill Segment Type</div>

3.1 Calculate Bill Segment Lines and Create Bill Segment(s) Using Rates Group: Generate Bill Segment
Group: Create Bill Segment Details
Group: Batch Billing
Group: Regenerate Bill Segment

Actor/Role: C2M(CCB)

Description:

C2M(CCB) passes the consumption information to rates to calculate the Bill Segment. Depending on the rate engine used, either the Calculation Groups/Calculation Rules or the Rate Components build the Bill Segment calculation lines.

Note the following about the resultant bill segment:

- A separate bill segment calculation header is created for each usage period in the list. Each calculation header reflects the consumption period used.
- Both the usage period and the SP usage period list entries will be stored as 'Service Quantity' records in the bill segment Calculation/Audit Usage Details.

- The usage period returned by MDM is also captured on the bill segment.
- If any reads details are found on the usage request, these are stored as 'Calculation/ Audit Read Details' records.
- After all usage period list entries have been processed; the system accumulates the bill determinants and stores these in the bill segment SQ collection for informational purposes.

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

C1-BSBS-UR - This bill segment creation algorithm creates a bill segment for a service agreement that requires bill determinants.

Customizable process N Process Name

BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.

Configuration required Y Entities to Configure:

Rates, Calculation Groups/Calculation Rules or Rate Components with associated Rate Related Algorithms.

3.2 Update Bill Segment to Freezable Status Group: Generate Bill Segment

Group: Batch Billing

Group: Usage Request

Group: Regenerate Bill Segment

Actor/Role: C2M(CCB)

Description:

C2M(CCB) updates the bill segment to freezable status.

3.3 Create Financial Transaction(s) Group: Generate Bill Segment

Group: Batch Billing

Actor/Role: C2M(CCB)

Description:

C2M(CCB) creates the associated financial details related to the Bill Segment. The Financial Transaction contains the financial effects of the Bill Segment on the Service Agreement's current and payoff balances and on the General Ledger.

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

BSBF-BA - This Bill Segment financial transaction algorithm creates a financial transaction for a Bill Segment where: - Payoff amount = Bill amount -

		<p>Current amount = Bill amount / zero / recurring charge amount</p> <p>BSBF-CU - This bill segment financial transaction algorithm creates a financial transaction for a bill segment where: - Payoff amount = 0 - Current amount = 0 - The general ledger is affected. Distribution codes are taken from the bill lines (typically these GL accounts are credited) and the SA type (typically this GL account is debited).</p> <p>C1-C0-GL - This bill segment financial transaction algorithm creates a financial transaction for a bill segment where: - Payoff amount = bill amount - Current amount = 0- The general ledger is affected</p> <p>C1-C0-NOGL - This bill segment financial transaction algorithm creates a financial transaction for a bill segment where: - Payoff amount = bill amount - Current amount = 0- The general ledger is not affected.</p> <p>CI_BSGFTDIST - Payoff Amt = Bill Amt / Current Amt = Amt Due (Checks bill segment CLOB for GL details)</p>
Customizable process N	Process Name	
		BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.
Configuration required Y	Entities to Configure:	
		Bill Segment Type

3.4 Create Bill Segment Exception(s) Group: Batch Billing

Group: Generate Bill Segment

Group: Freeze Bill Segment

Actor/Role: C2M(CCB)

Description:

If a freezable or frozen Bill Segment cannot be created, C2M(CCB) creates a [Bill Segment](#) in "error" status with a message that can be analyzed by a CSR or Authorized User. Typically, errors are caused by missing or incomplete data. The error may be reviewed when first created or left

when Batch Billing and the bill window is open and the system looks for the missing data. Data may be changed before Batch Billing next runs. When the Batch Billing process next runs, it deletes all “error” Bill Segment(s) and attempts to recreate them. It continues this throughout the Bill window. If a Bill Segment(s) is still in error at the end of the Bill window, a user must intervene and fix them. If the Bill Segment(s) is still in error when the cycle’s next window opens, a Bill error is generated by batch Billing...

Customizable process N Process Name

BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.

TD-BSERR - The process creates a To Do entry for every bill segment that's in error.

TD-BIERR - This process creates a To Do entry for every bill that's in error.

Configuration required Y Entities to Configure:

To Do Role(s) for base TD-BSERR and TD-BIERR To Do Types

3.5 Add Final Bill Switch for Bill Segment(s) Group: Generate Bill Segment **Group: Batch Billing**

Actor/Role: C2M(CCB)

Description:

If this is the final Bill Segment for this Service Agreement, it is marked as a closing Bill Segment.

Note: The Service Agreement must be stopped for this switch to be turned on.

Customizable process N Process Name

BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.

Configuration required N Entities to Configure:

Installation Options - Final Bill Threshold

3.6 Review Bill Segment(s)

Actor/Role: CSR or Authorized User

Description:

If the bill was created online (rather than by the batch process), the CSR or Authorized User reviews the Bill Segment for accuracy and determines the next action. The CSR or Authorized User decides if billing process could be continued, Bill Segment is incorrect, or created by mistake and needs to be deleted, rebilled, or canceled

3.7 Request Freeze Bill Segment(s)

Actor/Role: CSR or Authorized User

Description:

If the CSR or Authorized User does not identify a problem and decides to continue the Billing process, he/she requests to Freeze the [Bill Segment\(s\)](#).

3.8 Freeze Bill Segment(s) Group: Freeze Bill Segment

Group Batch Billing

Actor/Role: C2M(CCB)

Description:

The [Bill Segment\(s\)](#) and associated Financial Transaction are frozen in C2M(CCB). The Bill Freeze Option on the Installation Options controls when a Service Agreement's balance and General Ledger is affected by the Bill Segment and must be configured to meet the organization's accounting practices.

Note: If Customer has Net Metering sub SA see 4.2.2.15 C2M.Manage Net Energy Metering Charges for details.

Manual Process- Process is initiated by CSR or Authorized User when they request to Freeze Bill Segments created for Service Agreement.

Automated Process- This is a component of Batch Billing process and gets executed as a part of scheduled batch billing process that runs periodically. Functionality is the same as described in the Manual process. Bill segments are frozen and Bill completion is initiated if the 'Freeze and Complete' switch at the Bill Cycle Schedule is switched 'ON'.

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

BSFZ-EMPTY - This is a Customer Class Bill Segment freeze/cancel algorithm
--

C1-RV-TRUP - FT Freeze algorithm for sub SA - This algorithm transitions a (net energy metering) true up monitor from the Trued Up state into the Reverse True Up state whenever bill segment activity is detected for the period covered by the true up monitor.

Business Object (Y/N) Business Object

C1-NEMTrueUpTask - This business object defines the behavior of the true up monitor (TUM) used in net

		<div>energy metering scenarios. Each true up period is covered by an SA relationship and sub-SA, which is associated with a specific TUM. At the end of the true up period, the TUM performs true up processing: bringing the sub-SA balance to zero and transferring any positive balance to the master SA for the customer to pay off. It also sets up the SA relationship, sub-SA and TUM for the next true up period.</div>
Customizable process N	Process Name	
		<div>BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.</div>
Configuration required Y	Entities to Configure:	
		<div>Installation Options – Bill Freeze Options</div>
		<div>Bill Cycle- Freeze and Complete Switch</div>

3.9 4.2.2.15 C2M.Manage Net Energy Metering Charges Group: Freeze Bill Segment

Group: Bill Completion

Group: Batch Billing

Actor/Role: C2M(CCB)

Description:

During Bill Completion application performs true up and extends Net Metering Services by creating new sub SA and linking it to master SA or cancels true up monitor.

During Bill Segment Creation/FT Freezing or Bill Segment Cancellation/FT Freezing application reverse true up if true up process has been already performed

Refer to 4.2.215 C2M.Manage Net Energy Metering Charges for details.

4.0 Request Delete Bill Group: Delete Bill Segment

Actor/Role: CSR or Authorized User

Description:

During the review process, it is determined the Bill Segment was created incorrectly or by mistake. The CSR or Authorized User requests to delete the Bill or Bill Segment. When a Bill has only one Bill segment, the Bill and the corresponding segment are deleted at the Bill level.

Note: The Bill can be deleted prior to completion when Bill Segments are Freezable or in Error status.

4.1 Delete Bill Group: Delete Bill Segment**Actor/Role:** C2M(CCB)**Description:**

The Bill is deleted in C2M(CCB) and the financial record is removed from the database. There is no financial impact to the Customer's Account related to the deleted Bill and Bill Segments. .

4.2 Request Delete Specific Bill Segment(s) Group: Delete Bill Segment**Actor/Role:** CSR or Authorized User**Description:**

The CSR or Authorized User determines specific Metered Service Bill Segment(s) associated with a given Bill require deletion and requests to delete the Bill Segment(s).

4.3 Delete Bill Segment(s) Group: Delete Bill Segment**Actor/Role:** C2M(CCB)**Description:**

The specific Bill Segments are deleted in C2M(CCB) and the financial records are removed from the database. There is no financial impact to the Customer's Account related to the deleted Bill Segments.

4.4 Unlink Usage Request from Deleted Bill Segment**Actor/Role:** C2M(CCB)**Description:**

C2M(CCB) unlinks the usage request linked to the bill segment that is being deleted.

4.5 Request Rebill Bill Segment(s) Group: Rebill Bill Segment**Actor/Role:** CSR or Authorized User**Description:**

If more information is available, or there is further review or investigation, the CSR or Authorized User now determines a need to Rebill the Bill Segment(s). If the problem identified in the frozen Bill Segment has been resolved, the CSR or Authorized User requests to Cancel and Rebill the Bill Segment(s).

Configuration required Y Entities to Configure

Bill Cancel Reason

4.6 Update Bill Segment(s) to Pending Cancel, Generate New Bill Segment(s) Group: Rebill Bill Segment**Actor/Role:** C2M(CCB)**Description:**

The original Bill Segment(s) are updated to Pending Cancel, and new Bill Segment(s) created. New unfrozen Financial Transactions are associated with the new freezable Bill Segment.

Configuration required Y **Entities to Configure:**

Bill Cancel Reason

4.7 Request Undo Rebill Bill Segment(s) Group: Rebill Bill Segment

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User determines not to freeze the new Bill Segment(s). If the undo function is used, the newly generated segment is deleted.

4.8 Delete New Segment(s), Return Original Bill Segment(s) to Frozen Group: Rebill Bill Segment

Actor/Role: C2M(CCB)

Description:

C2M(CCB) deletes the newly generated segment and returns the original bill segment to frozen. There are no impacts to Financial Transactions.

4.9 Request Cancel Frozen Bill Segment(s) Group: Cancel Bill Segment

Actor/Role: CSR or Authorized User

Description:

The Bill Segment(s) may need to be canceled and not created again. The CSR or Authorized User initiates the Cancel function.

Configuration required Y **Entities to Configure:**

Bill Cancel Reason

5.0 Update Bill Segment(s) to Pending Cancel Group: Cancel Bill Segment

Actor/Role: C2M(CCB)

Description:

C2M(CCB) updates the bill segment to pending cancel. The CSR or Authorized User then reviews the bill segment input.

Configuration required Y **Entities to Configure:**

Bill Cancel Reason

5.1 Request Undo Cancel Bill Segment(s) Group: Cancel Bill Segment

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User has the option to undo the pending Cancel Bill Segment(s). Prior to the cancellation the CSR or Authorized User determines the [Bill Segment\(s\)](#) should not be canceled and uses the Undo function.

Configuration required Y Entities to Configure:

Bill Cancel Reason

5.2 Return Original Bill Segment(s) to Frozen Group: Cancel Bill Segment

Actor/Role: C2M(CCB)

Description:

The original [Bill Segment\(s\)](#) are returned to Frozen in C2M(CCB). There is no impact to financial transactions.

5.3 Request Finalize Cancel Bill Segment(s) Group: Cancel Bill Segment

Actor/Role: CSR

Description:

The CSR or Authorized User confirms the cancellation of Bill Segment(s).

Configuration required Y Entities to Configure:

Bill Cancel Reason

5.4 Update Bill Segment(s) to Canceled Group: Cancel Bill Segment

Actor/Role: C2M(CCB)

Description:

The existing Bill Segment(s) are updated to Canceled status in C2M(CCB). If a Bill Segment is cancelled, another Financial Transaction is created to reverse the original Financial Transaction. The cancellation Financial Transaction appears on the next Bill produced for the account as a Bill correction.

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

C1-PR-FT-CAN – This Customer Class FT Freeze algorithm is used to prevent cancellation of an FT where Freeze Date/Time is on or before the Conversion Date/Time

5.5 Request Add Bill Message(s)

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User may add Service Agreement related Bill Messages for a given frozen [Bill Segment\(s\)](#). The CSR or Authorized User may also add Bill Messages at the Account Level. The CSR or Authorized User adds these Bill Messages for an online Bill.

Configuration required Y Entities to Configure:

Bill Message

5.6 Add Bill Message(s)

Actor/Role: C2M(CCB)

Description:

The Bill Message is added in C2M(CCB).

5.7 Request Complete Bill

Actor/Role: CSR or Authorized User

Description:

When the CSR or Authorized User are satisfied with the Frozen Bill Segment(s) they initiate the Complete Bill function.

5.8 Apply Criteria for Completion Group: Pre-Bill Completion

Group: Batch Billing

Actor/Role: C2M(CCB)

Description:

Bill Completion is the last and one of the most critical components of the Billing process. The system completes the Bill and it's ready for extract and print. C2M(CCB) uses Pre-Bill Completion algorithms. Based on the requirements, the configured algorithms can delete Bill Segments in error, create Bill messages for the deleted segments, and create a To Do entry.

Manual Process: Based on configuration, additional Bill Messages can be added

Automated Process: (Batch billing) if required, such algorithms can:

- Delete Bill Segments in error, create Bill Messages for deleted Bill Segments, and create a To Do entry
- Delete bill certain type of Financial Transactions linked to the bill, for example, if only payments exist for newly created bill.
- Skip Bill Completion Action dependent on bill segment status. Additional available pre-bill completion algorithms are listed here.

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

<p>DEL BSEG -This SA Type pre-bill completion algorithm deletes bill segments that are in Error if: 1) the bill is not in Error, 2) the bill is being completed in batch, and 3) the process date matches the bill cycle window end date 4) at least one other frozen bill segment exists that is not in Error.</p> <p>When a bill segment is deleted, this algorithm also</p>
--

Customizable process N

Process Name

Configuration required Y

Entities to Configure:

creates a To Do entry (using the To Do Type and To Do Role (if specified) and adds a Bill Message to the bill.
CPBC-DB - This Customer Class pre-bill completion algorithm determines to delete a bill if it only contains frozen financial transactions of given types
C1-CHKBLELIG - This Customer Class pre-bill completion algorithm checks if all Bill Segments on the Bill are Freezable, Frozen or Cancelled. If not, return Skip Bill Completion Action.
C1-CPBC-TAXT - This Customer Class pre-bill completion algorithm accumulates and compares a bill's tax amount to the threshold amount and regenerates bill segments as necessary to take the threshold into consideration. If a bill's accumulated tax amount is less than the tax threshold amount, then taxes should not be charged.
C1-CSB-EBC - This algorithm skips completion of a bill until the bill cycle schedule end date. This is only done if the account linked to the bill has a characteristic that matches the Summary Billing Characteristic Type and Characteristic Value parameters defined.

BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.

To Do Type
To Do Role
Bill Message
SA Type
Customer Class

5.9 Create Bill Message Group: Pre-Bill Completion

Group: Batch Billing**Actor/Role:** C2M(CCB)**Description:**

C2M(CCB) creates a bill message for the given bill when a bill segment is deleted. The Bill Message code is a parameter for the following algorithm.

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

DEL-BSEG - This Bill pre-completion algorithm deletes Bill Segments that are in Error

Customizable process N Process Name

BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.

6.0 Create Estimated Consumption Message Group: Bill Completion**Group: Batch Billing****Actor/Role:** C2M(CCB)**Description:**

C2M(CCB) creates an estimated read Bill message if estimated consumption was used for Billing. Additional Bill Completion algorithms are listed here.

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

C2M-ESTBSMSG - This SA Type bill completion algorithm attaches a Bill Message Code to a Bill Segment based on estimated consumption.
C1-SUP-PR-BL - This Customer Class bill completion algorithm checks if the current bill being completed is for an account that has already been final billed in a previous run. If the account has been final billed, and if the current bill is not the final bill, the bill routings of the current bill will be reset.
C1-CN-BRT - This Customer Class bill completion algorithm suppresses bill routings for credit notes.
C1-CN-RADJ - This customer class bill completion algorithm reverses adjustments for a bill when a credit note is being created and completed for that bill.

Customizable process N	Process Name	C1-CAPBILLMN – This SA Type Bill Completion algorithm creates an entry to bill characteristic to capture the bill month.
		C1-CREPPBBM – This SA Type Bill Completion algorithm creates a bill message for prepaid service agreements.
		C1-PYOF-DBT – This SA Type Bill Completion algorithm checks the input credit SA's balance. If the balance amount is a credit, it looks for all frozen payments linked to this SA. These frozen payments are used to pay-off the account's outstanding debt via payment transfer.
		C1-TRN-TUM- This SA Type Bill Completion algorithm transitions any true up monitor (TUM) service tasks in the Active or Reverse True Up states associated with the master SA.
Configuration required Y	Entities to Configure:	BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.
		Bill Message

6.1 Create Bill Messages Based on Configuration Group: Bill Completion **Group: Batch Billing**

Actor/Role: C2M(CCB)

Description:

C2M(CCB) can also automatically add - Bill Messages during Bill completion. Bill Messages come from a variety of sources:

- Account Bill Messages
- Customer Class Bill Messages
- Service Agreement related Messages that are linked to Bill Segments
- Rate Schedule Bill Messages
- Service Provider Bill Messages
- Meter Reader Remark Bill Messages
- Ad hoc Messages by CSR or Authorized User
- Custom Background Processes and Algorithm Bill Messages

Customizable process N Process Name

BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.

Configuration required Y Entities to Configure:

Customer Class Bill Messages
Rate Schedule Bill Messages
Account and Service Agreement Bill Messages

6.2 Keep Credit on Excess Credit SA Group: Bill Completion **Group: Batch Billing**

Actor/Role: C2M(CCB)

Description:

Unless specifically configured as noted process Apply Credit to SA(s), C2M(CCB) keeps any excess credit on an Excess Credit SA.

Customizable process N Process Name

BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.

6.3 Apply Credit to SA(s) Group: Bill Completion **Group: Batch Billing**

Actor/Role: C2M(CCB)

Description:

When specifically defined, C2M(CCB) can transfer an existing credit on an Excess Credit SA to other SA's. Refer to 4.3.1.1 C2M.Manage Payments.

Note: An Excess Credit SA Type may be configured as a one-time charge SA Type, and automatically stopped, or may be allowed to stay in an Active Status for future transactions.

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

C2M-CR-XFER - This SA Type bill completion algorithm will transfer the balance of a credit SA to other SAs linked to the account.

Customizable process N	Process Name	SA Type
		Transfer Adjustment Type
Configuration required Y	Entities to Configure:	BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.

6.4 Add Adjustments, Payments, and Bill Corrections to Affect Bill Amount Group: Bill Completion **Group: Batch Billing**

Actor/Role: C2M(CCB)

Description:

During Bill Completion C2M(CCB) adds Adjustments, Payments or Bill corrections not included in the previous Bills to the newly created Bill.

Customizable process N	Process Name	BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.
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6.5 Determine Due Date, Late Payment Charge Date, and Credit Review Date Group: Bill Completion **Group: Batch Billing**

Actor/Role: C2M(CCB)

Description:

During Bill Completion, the Due Date, Late Payment Charge Date, and next Credit Review Date are determined and made available as information for the Bill and Account.

Process Plug-in enabled Y	Available Algorithm(s):	DUE DT OVRD – This override bill due date algorithm may override a bill's due date.
Customizable process N	Process Name	BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.
Configuration required Y	Entities to Configure:	

Customer Class - Due Date, LPC Eligibility, Late Payment Charge Grace Days

6.6 4.3.2.5a C2M.Manage Late Payment Charge Group: Bill Completion
Group: Batch Billing

Actor/Role: C2M(CCB)

Description:

Accounts that are eligible for Late Payment Charges have charges calculated after the LPC grace days. Refer to 4.3.2.5a C2M.Manage Late Payment Charge.

6.7 4.3.1.1d C2M.Manage Autopay Group: Bill Completion
Group: Batch Billing

Actor/Role: C2M(CCB)

Description:

An [Autopay](#) payment may be created during Bill Completion. Refer to 4.3.1.1d C2M.Manage Autopay.

Customizable process N Process Name

BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.

6.8 4.3.2.2 C2M.Manage Severance Process **Group: Bill Completion**
Group: Batch Billing

Actor/Role: C2M(CCB)

Description:

The status of a Severance Process can change due to Bill Completion. For example, an excess credit may be transferred to a utility SA that is currently covered by a severance process. Refer to 4.3.2.2 C2M.Manage Severance Process.

Customizable process N Process Name

BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.

6.9 4.3.2.5 C2M(CCB) Manage Write Off Uncollectible Receivables **Group: Bill Completion**
Group: Batch Billing

Actor/Role: C2M(CCB)

Description:

The status of a Write Off Process or Write Off SA can change due to Bill Completion. For example, an excess credit may be transferred to a stopped utility SA that is currently covered by a write off process. Refer to 4.3.2.5 C2M.Write Off Uncollectible Receivables.

Customizable process N Process Name

BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.

7.0 Create Additional Required Bill Message(s) Group: Post Bill Completion

Group: Batch Billing

Actor/Role: C2M(CCB)

Description:

C2M(CCB) can perform various post Bill completion activities. Additional custom Bill Message(s) can be added to the specific bill at the Customer Class level or the Account as noted in process 5.9.

Post completion algorithms also allow for adding various custom functionality based on business rules to impact/modify the bill overall. A sample of base post completion bill algorithms are shown here.

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

C1-CN-ADNB – This Customer Class post bill completion algorithm recreates adjustments after a credit note is completed. This algorithm is only applicable to credit notes.

C1-CR-BLRVWS - This Customer Class post bill completion algorithm creates a bill review record if a bill has financial transactions with FT GL lines that reference a distribution code with an accounting method of either 'Bill Due Date' or 'Earlier of Bill Due Date and Payment Date'. The Bill Review Batch Job is C1-BLRVW.

C2M-FRZNEMCR – This Customer Class post bill completion algorithm freezes a Net Energy Metering credit adjustment.

Customizable process N Process Name

BILLING - The Bill cycle Batch processing creates Bills

Configuration required Y	Entities to Configure:	for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.
		Customer Class
		Bill Message

7.1 Update Bill with Completion Details Group: Post Bill Completion**Group: Batch Billing****Actor/Role:** C2M(CCB)**Description:**

All Bill completion details are now updated in C2M(CCB) including any post bill completion messages.

Customizable process N**Process Name**

BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.

7.2 Review Bill**Actor/Role:** CSR or Authorized User**Description:**

If the bill was created by a CSR or Authorized User rather than the batch process, the CSR or Authorized User evaluates the Account and reviews the Bill for accuracy. The Bill may not be in a Complete status. Some data may be missing or has incomplete information. At times, it may be necessary to reopen the most recent Bill. Possibly a payment or adjustment was not included in the original Bill. A Bill Segment may need rebilling and changes reflected in a new Bill.

7.3 Make Necessary Changes for Bill**Actor/Role:** CSR or Authorized User**Description:**

During Bill Completion, information may be missing or incomplete. One example is the mailing address may be missing. The CSR or Authorized User reviews and resolves the error, enters correct data, and completes the Bill as needed.

7.4 Update Information**Actor/Role:** C2M(CCB)**Description:**

C2M(CCB) updates bill information as needed.

7.5 Request Reopen Bill**Actor/Role:** CSR or Authorized User**Description:**

After reviewing the CSR or Authorized User determines to reopen a Bill for the Customer's account.

7.6 Update Current Bill to Reopen**Actor/Role:** C2M(CCB)**Description:**

The current Bill is reopened in C2M(CCB) and available for applicable changes.

7.7 Request Changes to Impact Balance**Actor/Role:** CSR or Authorized User**Description:**

Based on investigation and established business rules, the CSR or Authorized User requests various changes that impact the balance. Typically, these changes can be: creation of a new Bill Segment, Rebill of a Bill Segment, Cancellation of a Bill Segment, Creation of a Payment or Adjustment, or Cancellation of a Payment or Adjustment.

7.8 Update Balance**Actor/Role:** C2M(CCB)**Description:**

The financial balance is updated in C2M(CCB).

7.9 Evaluate Bill Routing**Actor/Role:** C2M(CCB)**Description:**

As C2M(CCB) prepares the bill for the customer, the Bill Routing for the customer is checked to determine the routing method used to deliver the bill to the customer. The Bill Routing Type is defined on the customer's Account record.

Customizable process N**Process Name**

Bill Print Extract

Configuration required Y**Entities to Configure:**

Bill Route Type

Lookup - Bill Routing Method

8.0 Extract Bill for E-Bill**Actor/Role:** C2M(CCB)**Description:**

C2M(CCB) prepares required information for alternate delivery of the bill for the customer. This could be through text messaging, web presentation, email, or other communicated presentation. This is custom processing based on individual client needs.

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

BLEX-EX - This Bill Route Type Bill extract algorithm constructs the records that contain the information that appears on a printed Bill for Documaker.
C1-BLEX-XML- This Bill Route Type extract algorithm create XML bill extract records for Documaker.
C1-BLEX-BIP - This Bill Route Type extract algorithm schedules report job in BI Publisher to generate Bill Reports in range.
C1-BLEX-CR - This Bill Route Type extract algorithm prepares the report information needed to create a Bill using a Reporting Engine

Configuration required Y **Entities to Configure:**

Bill Route Type
Lookup - Bill Routing Method

8.1 Prepare and Send E-Bill to Customer

Actor/Role: C2M(CCB)

Description:

C2M(CCB) prepares required information for alternate delivery through some custom processing. This is a placeholder for any alternate method of bill delivery. This is custom processing based on individual client needs.

Customizable process Y **Process Name**

Custom Extract for Bill Delivery

8.2 Extract Bill for Postal Delivery

Actor/Role: C2M(CCB)

Description:

C2M(CCB) prepares required billing data and makes the data available for Document Management applications (Documaker and BI Publisher).

Note: An additional custom process may be created to interface with any other Document Management Software as needed.

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

Customizable process N Process Name

Customizable process Y Process Name

Configuration required Y Entities to Configure:

BLEX-EX - This Bill Route Type Bill extract algorithm constructs the records that contain the information that appears on a printed Bill for Documaker.
C1-BLEX-XML- This Bill Route Type extract algorithm create XML bill extract records for Documaker.
C1-BLEX-BIP - This Bill Route Type extract algorithm schedules report job in BI Publisher to generate Bill Reports in range.
C1-BLEX-CR - This Bill Route Type extract algorithm prepares the report information needed to create a Bill using a Reporting Engine
POSTROUT - CIPBXBLB
Custom Extract Process
Bill Route Type
Lookup - Bill Routing Method

8.3 Prepare and Send Bill to Customer

Actor/Role: Document Management Software

Description:

Document Management Software reads and process bill information produced by C2M(CCB). It prints actual bills or prepare bills in another format (e-mail, PDF online format, short message service (SMS)). The bill is made available for the Customer. This is custom processing based on individual client needs.

8.4 Receives Bill

Actor/Role: Customer

Description:

The Customer receives the Bill.

Configuration required Y Entities to Configure:

Bill Route Type

8.5 Select Accounts for Open Bill Cycles Group: Batch Billing

Actor/Role: C2M(CCB)

Description:

For the open bill period, C2M(CCB)_selects all accounts to be billed by looking at the account's bill cycle.

Customizable Process N Process Name

BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.

Configuration required Y Entities to Configure:

Bill Cycle

8.6 Check Eligibility for Batch Billing Group: Batch Billing

Actor/Role: C2M(CCB)

Description:

C2M(CCB) verifies that the account is eligible to be billed.

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

C1-SKIPACCCB - This Customer Class bill eligibility algorithm stops processing an account during batch billing if a completed bill exists for the current bill cycle schedule.

C1-SKIPINACC - This Customer Class bill eligibility algorithm stops processing an "inactive" account if all the following conditions are true:

- There are no billable service agreements
- There are no FTs eligible for sweeping onto the bill
- There are no temporary account messages to be swept onto the bill

Customizable Process N Process Name

BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.

Configuration required Y Entities to Configure:

Customer Class

8.7 Determine Bill Period, Consumption Period Group: Batch Billing

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

C2M(CCB) determines the Bill Period boundary, and next determines the Consumption Period boundary.

Bill segments produced for a service agreement have two time periods:

- The bill segment period. The bill segment period defines the entire period of time covered by a bill segment's charges.
- The consumption period. The consumption period defines the period of time used to calculate the number of days for daily charges.

Bill Segment Start date:

- If this is the initial Bill Segment for the Service Agreement, the start date is set to the start date of the Service Agreement
- If this is not the initial Bill Segment for the Service Agreement, the start date is the previous Bill Segment's end date.

Bill Segment End Date

- If this is the last (final) Bill Segment for the Service Agreement, the end date is the Service Agreement's end date
- If this is not the last (final) Bill Segment for the Service Agreement, the Billing Option selected by the Authorized User determines how the end data is set. When Billing Option of Use Cutoff Date is selected, the end date is the specified Cutoff Date. When Billing Option of Use Schedule is selected, the end date is determined by available measurement data based on the Service Agreement's Service Point's measurement cycle.

The consumption period almost always starts one day after the bill segment period. The only time this true is the first bill segment that's produced for a new service agreement. This is because different utilities count the first day of a new service agreement differently than others. This is controlled by configuration of SA Type Initial Start Date Option.

The consumption period always ends on the bill segment's end date

The bill condition is noted on the Usage Request. Valid bill conditions are: initial, interim or final.

Note: The system ignores Service Points that are not billable, disconnected before the Bill period started, or are yet to be connected as of the Bill end date.

Customizable Process N**Process Name**

BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.

Configuration required Y**Entities to Configure:**

Bill Cycle
Frequency
Bill Segment Type and associated algorithms
Rates
SA Types

8.8 Create Bill Exceptions Group: Batch Billing**Actor/Role:** C2M(CCB)**Description:**

C2M(CCB) identifies Bills in an error status. They are placed in an exception table and can be made available as To Do entries. If C2M(CCB) determines the bill cannot be completed, a bill exception is created for review by a CSR or Authorized User. For example, if the customer's mailing address is not defined, the corresponding bill cannot be completed.

Customizable process N**Process Name**

BILLING - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle. Online Billing process creates a Bill for account when requested by an Authorized User.

8.9 Identify Bill Segments in Error Status Group: Processing Bill Segment Exceptions**Group: TO DO Bill Segment Error Process****Actor/Role:** C2M(CCB)**Description:**

C2M(CCB) identifies Bill Segments in error status. C2M(CCB) can create a To Do Entry for every [Bill Segment](#) in error status.

Customizable process N**Process Name**

TD-BSERR- This background process creates a To Do entry for every Bill Segment that's in error.

Configuration required Y**Entities to Configure:**

To Do Role(s) for base TD-BSERR To Do Type

9.0 Update Drill key With Latest Bill Segment Group: Processing Bill Segment Exceptions**Group: TO DO Bill Segment Error Process****Actor/Role:** C2M(CCB)**Description:**

C2M(CCB) helps to eliminate duplication of to do entries for same bill segment in error by validating if there is an existing to do entry for given exception. The TD-BSERR (To Do for Bill Segments in Error) batch control eliminates To Do Entry duplication by updating the drill value to reflect the regenerated Bill Segment ID when an existing To Do Entry is found for the original bill segment.

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

C1-TDCR-DFRL - Default To Do Role via Account/Premise

Customizable process N	Process Name	C1-TDCR-CHAR - Link Account/Premise/Person/SA/SP to To Do
		D1-TDPRCRE - To Do Pre-Creation
		X1-TDPRCRE - Customer to Meter To Do Pre-Creation
Configuration required Y	Entities to Configure:	TD-BSERR- This background process creates a To Do entry for every Bill Segment that's in error.
		To Do Role(s) for base TD-BSERR To Do Type
		Installation Option Framework- To Do Pre-Creation Algorithms

9.1 Create Bill Segment Error To Do Group: Processing Bill Segment Exceptions

Group: TO DO Bill Segment Error Process

Actor/Role: C2M(CCB)

Description:

C2M(CCB) can create a To Do Entry for every Bill Segment in error status. The To Do functionality allows for online review by a user or group of users. To Do Lists summarize and total entries for different To Do Types. Status of To Do Entries is available for evaluation.

Customizable process N	Process Name	TD-BSERR- This background process creates a To Do entry for every Bill Segment that's in error.
Configuration required Y	Entities to Configure:	To Do Role(s) for base TD-BSERR To Do Type

9.2 Evaluate and Perform Analysis Group: Processing Bill Segment Exceptions

Group: Processing Bill Exceptions

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User will review the [Bill Segment](#) or [Bill](#) error and supporting information in C2M. Service Point, Device (Meter) and Read historical information, Device (Meter) Configuration, Activity History, Account, Service Agreement, and Billing History are some of the areas reviewed. Typically errors are caused by missing or incomplete information. Based on established business rules, the CSR or Authorized User investigates viable solutions or workarounds for the missing or incomplete information.

9.3 Resolve Issue Group: Processing Bill Segment Exceptions

Group: Processing Bill Exceptions

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User resolves the error and enters information into C2M.

9.4 Update Data Group: Processing Bill Segment Exceptions**Group: Processing Bill Exceptions**

Actor/Role: C2M(CCB)

Description:

Information required for resolution is updated in C2M

9.5 Request Complete To Do Group: Processing Bill Segment Exceptions**Group: Processing Bill Exceptions**

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User marks the To Do Entry as complete and requests completion of the To Do Entry. The CSR or Authorized User may add comments or a log entry for future reference.

Note: Completed To Do entries are typically purged after a defined period of time.

9.6 Complete To Do Entry Group: Processing Bill Segment Exceptions**Group: Processing Bill Exceptions****Group: Complete Bill Segment Exception To Do**

Actor/Role: C2M(CCB)

Description:

The To Do Entry is updated to Complete Status in C2M

9.7 Examine Bill Segment Exception Table Group: Complete Bill Segment Exception To Do

Actor/Role: C2M(CCB)

Description:

C2M(CCB) identifies and completes To Do Entries that are "Open" or "Assigned" that were previously created for bill segment exception records, but currently have no entries in the exception table.

Customizable process N

Process Name

C1-CTBSE- Complete To Do of Bill Segment Exception

9.8 Identify Bills in Error Status Group: Processing Bill Exceptions**Group: TO DO Bill Error Process**

Actor/Role: C2M(CCB)

Description:

C2M(CCB) identifies Bills in an error status. If C2M(CCB) determines the bill cannot be completed, a bill exception is created for review by a CSR or Authorized User. An associated To Do can be created. For example, if the customer's mailing address is not defined, the corresponding bill cannot be completed.

Customizable process N Process Name

TD-BIERR - This background process creates a To Do entry for every Bill that's in error.

Configuration required Y Entities to Configure:

To Do Role(s) for base TD-BIERR To Do Type

9.9 Create Bill Error To Do Group: Processing Bill Exceptions

Group: TO DO Bill Error Process

Actor/Role: C2M(CCB)

Description:

C2M(CCB) can create a To Do Entry for every [Bill](#) in error status. The To Do functionality allows for online review by a user or group of users. To Do Lists summarize and total entries for different To Do Types. Status of To Do Entries is available for evaluation.

Customizable process N Process Name

TD-BIERR - This background process creates a To Do entry for every Bill that's in error.

Configuration required Y Entities to Configure:

To Do Role(s) for base TD-BIERR To Do Type

10.0 Evaluate Entire Batch of Bills

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User is made aware of a possible anomaly with a particular Batch of Bills.

10.1 Identify Bill Cycle, Window Start Date or Given Bill Date Group: Mass Cancellation Process

Group: Mass Reopen Process

Actor/Role: C2M(CCB)

Description:

This background processes for canceling or reopening an entire batch of Bills requires identification of the Bill cycle, window start date or given Bill date. These parameters are supplied for execution of the background process. This process is typically run at the direction of a user as required.

Customizable process N**Process Name:**

MASSCNCL - The mass Bill cancellation process removes an entire batch of Bills that were created by the BILLING process.
--

MASSROBL - The mass Bill reopen process reopens an entire batch of Bills that were completed by the BILLING process. It will reopen all the Bills for a given Bill date for the latest run of a given Bill cycle's schedule.
--

10.2 Cancel Entire Batch of Bills Group: Mass Cancellation Process**Actor/Role:** C2M(CCB)**Description:**

This background process cancels all frozen Bill Segments for the latest run of a given Bill cycle's schedule, or for a given date within the Bill cycle's schedule. A cancel reason of mass cancel is used. When the cycle is billed again, new Bill Segments are created. The original Bill Segments and cancellations are not apparent to the Customer. Careful consideration is given to this overall process. It is typically only executed based on decisions of an overall team of users as required.

Customizable process N**Process Name:**

MASSCNCL - The mass Bill cancellation process removes an entire batch of Bills that were created by the BILLING process.
--

Configuration required Y**Entities to Configure:**

Cancel Reason - MASS

10.3 Reopen Entire Batch of Bills Group: Mass Reopen Process**Actor/Role:** C2M(CCB)**Description:**

This background process reopens an entire batch of Bills. All Bills for a given Bill date for the latest run of a given Bill cycle's schedule will be reopened. Careful consideration is given to this overall process. It is typically only executed based on decisions of an overall team of users as required.

Customizable process N**Process Name:**

MASSROBL - The mass Bill reopen process reopens an entire batch of Bills that were completed by the BILLING process. It will reopen all the Bills for a given Bill date for the latest run of a given Bill cycle's schedule.
--

Test Assets related to the Current Process

Testing Asset Sr.No	Use Case	No Of Data sets
1	URM-C2M-4222-001-Manually-Generate-And-Complete-Bill	9
2	URM-C2M-4222-002-Manually-Generate-And-Complete-Final-Bill	6
3	URM-C2M-4222-003-Manually-Generate-And-Complete-Bill-With-Adjustment	6
4	URM-C2M-4222-004-Manually-Generate-And-Complete-Bill-Using-Estimated-Read	6
5	URM-C2M-4222-005-Manually-Rebill-Frozen-Bill-Segment-And-Complete-Bill	6
6	URM-C2M-4222-006-Manually-Generate-Complete-Then-Reopen-Bill	6
7	URM-C2M-4222-007-Manually-Gen-Freeze-Est-Bill-Seg-Then-Rebill-Using-Actual-Read-Scalar	3
8	URM-C2M-4222-008-Submit-Batch-Billing	1

Document Control

Change Record

Date	Author	Version	Change Reference
6/8/09	Colleen King	Draft	No Previous Document
6/9/09	Colleen King		Updates from Review
6/10/09	Colleen King		Updates from Review
6/15/09	Colleen King		Updates from Review
6/16/09	Colleen King		Updates from Review
8/21/09	Colleen King		Updates from Review
9/1/09	Colleen King		Updates from Review
9/3/09	Colleen King		Updates from Review
3/27/2012	Rochelle Cister		Updated for THOR
8/15/2017	Liz Ellicott		Updated for C2M - document combined for batch and online processes
11/15/2017	Colleen King		This represents an accumulated effort by multiple resources after determination to recombine online and batch processing. This process is now updated for C2M.
12/21/2017	Galina Polonsky		Reviewed, Approved
8/15/2018	Debby Phelps		Updated for C2M SP1
09/13/2018	Galina Polonsky		Reviewed, Approved
6/3/2019	Satya Kalavala		Updated format for v2.7
1/30/2020	Antonio Napoli		Changed Filename, Process name as per URM formatting in this document and Visio
03/14/2024	Kunal Nerkar		Updated Document and Visio C2M v2.9
03/18/2024	Line Prado		Reviewed
12/18/2024	Galina Polonsky		Reviewed, Approved

Attachments:

Bill

Bill Main:

Bill

Bookmark

Clear

Save

Refresh

Main

Bill Segments

Bill Routings

Bill Messages

Characteristics

Bill Info

Date: 04-01-2017, Complete, Due: 04-17-2017, \$120.01

Bill ID 022762121027

Account ID 0221264307 Mark,Brazil, Residential, \$0.00

Bill Status

Complete

Display Bill

Due Date

04-17-2017

Create Date/Time

04-01-2017 12:07:00

Bill Date

04-01-2017

Completion Date/Time

04-01-2017 12:07:20

Late Payment Charge Details

Eligible for Late Payment Charge

☐

Late Payment Charge Date

Previous Period's Balance	\$99.25	Bill Segment	Current Amount	Status	Remarks
		California / Electric Residential, Frozen, Period: 03-01-2017 - 04-01-2017, \$120.01, 0226899702	\$120.01	Frozen	
Total Payments	\$-99.25				
Total Adjustments	\$0.00				
Total Bill Corrections	\$0.00				
Total Current Billing Charges	\$120.01				
Ending Balance This Period	\$120.01				

Total Generated Charge \$120.01

Bill Segment Action

Generate

Freeze

Cancel Frozen

Bill Action

Complete

Delete

Reopen

Correction Note

Undo Correction Note

Bill - Bill Segments

Bill

Bookmark

Clear

Save

Main

Bill Segments

Bill Routings

Bill Messages

Characteristics

Bill Info

Date: 04-01-2017, Complete, Due: 04-17-2017, \$120.01

Bill ID ⓘ 022762

SA Filter

All ▼

Status Filter

All ▼

Select All

Clear All

0 number of bill segments selected

	Premise	Bill Segment	Current Amount	Status	Remarks	Service Quantity	UOM	Bill Segment ID
<input type="checkbox"/>	100 Switch Back Road, Apt. 105, Fremont, CA, 94516	California / Electric Residential, Frozen, Period: 03-01-2017 - 04-01-2017, \$120.01, 0226899702	\$120.01	Frozen		1155.000000	Kilowatt-Hours	022366629526

Bill Segment Actions

Generate

Freeze

Delete

Cancel/Rebill/Freeze

Cancel

Bill - Bill Routings

Bill

BookmarkClearSaveRefresh

MainBill SegmentsBill RoutingsBill MessagesCharacteristics

Bill Info

Date: 04-01-2017, Complete, Due: 04-17-2017, \$120.01

Bill ID 022762121027

Bill Routing Information

← "I" of "I" → +

Person ID

0275489026

Mark,Brazil - Home Phone:(415) 093-7829

Bill Routing Parameters

Bill Route Type

Route via postal service

Format

Detailed

Copies

1

Sequence

1

Reprint

PO ID

Batch Control

POSTROUT #

1

Do Not Extract

Intercept

Address Information

Name 1

Frank,Ellie

Name 2

Name 3

Country

United States of America

Zipcode

94516

Address 1

100 Switch Back Road, Apt. 105

Address 2

Address 3

City

Fremont

County

Alameda

Bill - Bill Messages

Bill

Main

Bill Segments



Bill Routings

Bill Messages

Characteristics

Bill Info

Date: 04-01-2017, Complete, Due: 04-17-2017, \$120.01

		Bill Message	Message on Bill	Priority	Insert Code
+		* RES 	Please call (555) 192-9111 if you have any questions about your rate	30	

Bill - Characteristics

Bill

Main

Bill Segments



Bill Routings

Bill Messages

Characteristics

Bill Info

Date: 04-01-2017, Complete, Due: 04-17-2017, \$120.01

		Characteristic Type	Sequence	Characteristic Value
+		* <input type="text"/>	* <input type="text"/>	<input type="text"/> 

Bill Segment

Bill Segment Main

Bill Segment								
Main	Items	SQ Details	Calc Lines	Financial Details	Bill Segment Messages	Sub Bill Segment	Usage	Bill Segment Portal
Bill Seg Info		California / Electric Residential, Frozen, Period: 03-01-2017 - 04-01-2017, \$120.01, 0226899702						
Account ID	☑ 0221264307	🔍 Mark,Brazil, Residential, \$0.00	Current Amount		\$120.01			
Bill ID	☑ 022762121027	🔍 Date: 04-01-2017, Complete, Due: 04-17-2017, \$120.01						
SA ID	☑ * 0226899702	🔍 California / Electric Residential, ERES1, Active, 01-01-2017, Single-family / electric heat discount, 0226899702						
Period	03-01-2017 - 04-01-2017							
Usage Period	03-01-2017 0:00:00 PST - 04-01-2017 1:00:00 PDT							
Bill Cycle								
Status	Frozen		Closing <input type="checkbox"/>		Estimated <input type="checkbox"/>		SQ Override <input type="checkbox"/> Item Override <input type="checkbox"/>	
Premise	☑ 100 Switch Back Road, Apt. 105, Fremont, CA, 94516	Create Date/Time		04-01-2017 12:07:01				
Bill Segment Actions	Generate	Delete	Freeze	Rebill	Init Cancel	Undo	Cancel	

Bill Segment SQ Details

Bill Segment

Bookmark

Clear

Save

Refresh

Main

Items

SQ Details

Calc Lines

Financial Details

Bill Segment Messages

Sub Bill Segment

Usage

Bill Segment Portal

Bill Seg Info

California / Electric Residential, Frozen, Period: 03-01-2017 - 04-01-2017, \$120.01, 0226899702

Bill Segment ID * 022366629526

Service Quantity

		Unit of Measure	Time of Use	SQI	Initial Service Quantity	Billable Service Quantity
+				DAYS	31.000000	31.000000
+		KWH			1155.000000	1155.000000

Calculation/Audit Read Details

		Final Unit of Measure	Final Time of Use	Final Service Quantity ID	Start Date/Time	End Date/Time	Quantity	Unit of Measure
+		KWH			03-01-2017 0:00:00 PST	04-01-2017 1:00:00 PDT	1155.000000	KWH

Calculation/Audit Usage Details

Final Unit of Measure	Final Time of Use	Final Service Quantity ID	Start Date/Time	End Date/Time	Quantity	Sequence	Service Point ID
Kilowatt-Hours			03-01-2017 0:00:00 PST	04-01-2017 1:00:00 PDT	1155.000000	1	
		Days	03-01-2017 0:00:00 PST	04-01-2017 1:00:00 PDT	31.000000	2	
Kilowatt-Hours			03-01-2017 0:00:00 PST	04-01-2017 1:00:00 PDT	1155.000000	3	1171422567

Bill Segment Calc Lines

Bill Segment

Bookmark

Clear

Save

Refresh

Main

Items

SQ Details

Calc Lines

Financial Details

Bill Segment Messages

Sub Bill Segment

Usage

Bill Segment Portal

Bill Seg Info

California / Electric Residential, Frozen, Period: 03-01-2017 - 04-01-2017, \$120.01, 0226899702

Bill Segment ID

022366629526

Bill Seg Hdr

"1" of "1"

Sequence

1

Start Date

03-02-2017

End Date

04-01-2017

Amount

\$120.01

Desc on Bill

Electric residential rate

Rate Version

Electric residential stepped daily minimum 01-01-2000

Calc Line Char	Sequence	Description on Bill	Calculated Amount	Print	Appears in Summary	Unit of Measure	Time of Use	SQ
	1	300.00 kWh at \$0.1182 per kWh (0 - 300 kwh)	\$35.46	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Kilowatt-Hours		
	2	855.00 kWh at \$0.0973 per kWh (300 - 1,155 kwh)	\$83.19	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Kilowatt-Hours		
	3	Summary of stepped charges	\$118.65	<input type="checkbox"/>	<input type="checkbox"/>			
	4	FCPO: Calculate daily minimum	\$3.10	<input type="checkbox"/>	<input type="checkbox"/>			
	5	Special discount -15%	\$-17.80	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
	6	City sales tax 11.5%	\$11.60	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
	7	State sales tax 7.5%	\$7.56	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
	8	Tax total	\$19.16	<input type="checkbox"/>	<input type="checkbox"/>			

Bill Segment Financial Details

Bill Segment
Bookmark
Clear
Save
Refresh

Main
Items
SQ Details
Calc Lines
Financial Details
Bill Segment Messages
Sub Bill Segment
Usage
Bill Segment Portal

Bill Seg Info
California / Electric Residential, Frozen, Period: 03-01-2017 - 04-01-2017, \$120.01, 0226899702
Bill Segment ID
022366629526

Bill Segment FT
"1" of "1"

FT Type
Bill Segment
Current Amount
\$120.01

Show on Bill
☒

FT ID
022945316185
Posted by LMURRAY on 04-01-2017
Accounting Date
04-01-2017

Linked to Bill on 04-01-2017
Arrears Date
04-01-2017

Sequence	Distribution Code	Amount	Statistics	Statistics Amount	Description
1	R-ELERES	\$-118.65	KWH	1155.000000	
2	E-DISCOUNT	\$17.80		0.000000	Single-family / electric heat
3	A/P-CITY	\$-11.60		0.000000	San Francisco
4	A/P-STATE	\$-7.56		0.000000	California
5	A/R-UTIL	\$120.01		0.000000	

Bill Segment Bill Segment Messages

Bill Segment
Main
Items
SQ Details
Calc Lines
Financial Details
Bill Segment Messages
Sub Bill Segment
Usage
Bill Segment Portal

Bill Seg Info
California / Electric Residential, Frozen, Period: 03-01-2017 - 04-01-2017, \$120.01, 0226899702

		Msg Code	Message on Bill	Priority	Insert Code
+		* CONS	Conserving energy can save you money, call (555) 129-1920 for information about how we can help		

Bill Segment Sub Bill Segment

Bill Segment

Main
Items
SQ Details
Calc Lines
Financial Details
Bill Segment Messages
Sub Bill Segment
Usage
Bill Segment Portal

Bill Seg Info
California / Electric Residential, Frozen, Period: 03-01-2017 - 04-01-2017, \$120.01, 0226899702

Bill Segment	Current Amount	Bill Segment Status
--------------	----------------	---------------------

Bill Segment Usage

Bill Segment

Main
Items
SQ Details
Calc Lines
Financial Details
Bill Segment Messages
Sub Bill Segment
Usage
Bill Segment Portal

General Information

Bill Segment ID022366629526

Bill Segment InformationCalifornia / Electric Residential, Frozen, Period: 03-01-2017 - 04-01-2017, \$120.01, 0226899702

Bill Segment Usage

Filters: Bill Segment ID 022366629526

	Create Date/Time	Usage	Usage ID
1	04-01-2017 12:07:00	California / Electric Residential, Bill Determinants Processed, 03-01-2017 - 04-01-2017	022321102536

Admin Menu/Installation Options/Control Central Alerts

Installation Options - Framework				
Main Messages Algorithms Accessible Modules Installed Products				
		System Event	Sequence Number	Algorithm
+		* Control Central Alert	* 10	C1LASTCUSTCN Highlight Last Customer Contact
+		* Control Central Alert	* 20	C1NOPNCUSTCN Highlight Number of Open Customer Contacts
+		* Control Central Alert	* 30	C1CCEXSTACCT Highlight Comment Exists on Account
+		* Control Central Alert	* 40	C1ACCTALERTS Highlight Account Alerts
+		* Control Central Alert	* 50	C1ACTVWOPROC Highlight Active Write-off Process
+		* Control Central Alert	* 60	C1FATYPALMSG Highlight Field Activity Type Alert Message
+		* Control Central Alert	* 70	C1SATYPALMSG Highlight Service Agreement Type Alert Message
+		* Control Central Alert	* 80	C1HNBBSA Highlight Non-Billed Budget SA
+		* Control Central Alert	* 90	C1HNCASHDEP Highlight Non-Cash Deposit
+		* Control Central Alert	* 100	C1HPENDSAREL Highlight Pending SA Relationships
+		* Control Central Alert	* 110	C1PENDSTOPSA Highlight Pending Stop SA
+		* Control Central Alert	* 120	C1PENDFAALRT Highlight Pending Field Activity
+		* Control Central Alert	* 130	C1REACTSALRT Highlight Reactivated SA
+		* Control Central Alert	* 140	C1PERLNKACCT Highlight Person Linked to Multiple Accounts

Installation Options - Framework				
Main Messages Algorithms Accessible Modules Installed Products				
		System Event ▼	Sequence Number	Algorithm
+	🗑️	* To Do Pre-Creation ▼	* 20	🔗 X1-TDPRCRE 🔍 Customer to Meter To Do Pre-Creation
+	🗑️	* To Do Pre-Creation ▼	* 17	🔗 D1-TDPRCRE 🔍 To Do Pre-Creation
+	🗑️	* To Do Pre-Creation ▼	* 15	🔗 C1-TDCR-CHAR 🔍 Link Account/Premise/Person/SA/SP to To Do
+	🗑️	* To Do Pre-Creation ▼	* 10	🔗 C1-TDCR-DFRL 🔍 Default To Do Role via Account/Premise

Admin Menu/Installation Options/Billing

Installation Options

[Bookmark](#) [Clear](#) [Save](#) [Refresh](#)

[Main](#) [Person](#) [Account](#) [Billing](#) [C&C](#) [Financial Transaction](#)

Bill Segment Freeze Option	* Freeze At Will
Accounting Date Freeze Option	* Change If Period Is Closed
Rollover Threshold Factor	* 0.700
Minimum Amount for Final Bill	\$0.45
User Can Override Bill Date	<input checked="" type="checkbox"/>
Use High/Low Failures on Bill	<input checked="" type="checkbox"/>
Base Time	2:00:00
Start Day Option	Current Day
Use Alternative Bill ID	<input type="checkbox"/>
Alternative Bill ID Option	
Bill Correction Option	
Auto Pay Creation Option	* Create At Bill Completion

Control Central Search

Control Central Search

Main



Control Central Search ⓘ

Search By

Name and Address ▾

Name

Mark,Brazil

Address

City

Postal

CIS Division


▾

Show All Premises

☒

Search

Hide Filters

Person/Account 	Premise	ID Type	ID Nbr
Mark,Brazil - Home Phone:(415) 093-7829 (Main customer - Acct. 0221264307)	100 Switch Back Road, Apt. 105, Fremont, CA, 94516	Social security number	*****5711

Dashboard

Control Central

Bookmark
Clear
Save
Refresh

Account Information
Customer Information
Account Tree
Premise Tree
Bill/Payment Tree
Payment Agreements

Account Activity History

	Date	Activity	Description
1	01-01-2017	Customer Contact	Mark,Brazil, General contacts / Order completed Contacted: 01-01-2017 11:43:33
2	01-01-2017	Field Activity	100 Switch Back Road, Apt. 105, Fremont, CA, 94516,Electric Residential, Start/Stop Service Request, Start Service, Completed, Scheduled 01-01-2017 0:00:00

Account Financial History

	Arrears Date	Financial Transaction Type	Current Amount	Current Balance	Payoff Amount	Payoff Balance
1	04-12-2017	Pay Segment	\$-120.01	\$0.00	\$-120.01	\$0.00
2	04-01-2017	Bill Segment	\$120.01	\$120.01	\$120.01	\$120.01
3	03-13-2017	Pay Segment	\$-99.25	\$0.00	\$-99.25	\$0.00
4	03-01-2017	Bill Segment	\$99.25	\$99.25	\$99.25	\$99.25
5	02-13-2017	Pay Segment	\$-113.23	\$0.00	\$-113.23	\$0.00
6	02-01-2017	Bill Segment	\$113.23	\$113.23	\$113.23	\$113.23

Alerts

Last Contact: 1,157 days ago - Murray,Lynette

Applicable Campaigns

One Off Charges

Alerts

Last Contact: 1,157 days ago - Murray,Lynette
Auto-Pay Active
Landlord Exists
Premise is linked to a Parent Premise
2 Outstanding To Do Entries For Account
1 Outstanding To Do Entries For Person
1 Outstanding To Do Entries For Premise
29 day(s) until next bill

Full Context



Mark,Brazil - Home Phone:(415) 093-7829
Mark,Brazil, Residential, \$0.00
100 Switch Back Road, Apt. 105, Fremont, CA, 94516
100 Switch Back Road, Apt. 105, Fremont, CA, 94516 / Electric Residential / Electric / ER-1000012 / Read Cycle 01, Route 120 / Active
ER-1000012 / Electric Manual Read Meter - Digital / Install Date/Time: 01-01-2017 0:00:00 PST / On / Active
ER-1000012 / Electric Scalar kWh - Manual Read

Rate Algorithms / Entities to Configure

Entities to Configure

Rate Schedule	Bill Factors
Unit of Measure	Bill Factor Values
Calculation Groups	Characteristics
Calculation Rules	Distribution Codes
Calculation Line Category	Various Algorithm Parameters
Measuring Components	Define Rates on Applicable SA Types
Device Types	Bill Messages
Service Quantity Identifiers	Frequency

Bill Factor Rate Selection Date

Expand Filters		Filters: Algorithm Entity Bill Factor - Rate Selection Date			
	Algorithm Type	Description 	Algorithm Entity	Script	Detailed Description
1	C1-BFRDATE	Bill Factor Rate Selection Date	Bill Factor - Rate Selection Date		This bill factor rate selection date algorithm defines how the system retrieves bill factor values o ...
2	C1-MONTHPROC	Month Based Processing	Bill Factor - Rate Selection Date	Month Based Processing 	This algorithm returns the bill segment consumption end date as the reference date used to retrieve ...
3	C1-RETBACCDT	Retrieve Bill Accounting Date	Bill Factor - Rate Selection Date		This bill factor rate selection date algorithm obtains the accounting date stored as bill characteri ...

Various Calculation Rule Algorithms (Using Java Rate Engine)

	Algorithm Type	Description 	Algorithm Entity	S
1	C1-ACALR-RFG	Execute Calculation Group	Calc Rule (BO) - Apply Calc Rule	
2	C1-ACRSUBUSG	Get Sub-Usage Request SQ	Calc Rule (BO) - Apply Calc Rule	G
3	C1-APPLYTO	Apply To	Calc Rule (BO) - Apply Calc Rule	
4	C1-CALCCCL	Calculate Climate Change Levy and Relief Charges	Calc Rule (BO) - Apply Calc Rule	
5	C1-CALCFNVL	Calculate Final Reading Value	Calc Rule (BO) - Apply Calc Rule	
6	C1-CALC-SQ	Calculate Service Quantity	Calc Rule (BO) - Apply Calc Rule	
7	C1-CALCVAT	Apply VAT to Cross Referenced Charges	Calc Rule (BO) - Apply Calc Rule	
8	C1-CALMSCCHG	Calculate Miscellaneous Charges	Calc Rule (BO) - Apply Calc Rule	
9	C1-CPY-MB-SQ	Copy Master Bill Segment Service Quantity	Calc Rule (BO) - Apply Calc Rule	C
10	C1-DET-DVTP	Determine Demand Value to Price	Calc Rule (BO) - Apply Calc Rule	
11	C1-FLAT-CHRG	Flat Charge	Calc Rule (BO) - Apply Calc Rule	
12	C1-ITEMTYPE	Item Type	Calc Rule (BO) - Apply Calc Rule	
13	C1-MATH	Math Rule	Calc Rule (BO) - Apply Calc Rule	
14	C1-MAXIMUM	Maximum Charge	Calc Rule (BO) - Apply Calc Rule	
15	C1-MINIMUM	Minimum Charge	Calc Rule (BO) - Apply Calc Rule	
16	C1-SIMP-SUMM	Simple Summary	Calc Rule (BO) - Apply Calc Rule	
17	C1-SQ	Service Quantity	Calc Rule (BO) - Apply Calc Rule	
18	C1-STPD-SQ	Stepped Service Quantity	Calc Rule (BO) - Apply Calc Rule	
19	C1-SUMMARY	Summary	Calc Rule (BO) - Apply Calc Rule	
20	C2M-CALDSTPC	Calculate GL Details Given Percentage Distribution	Calc Rule (BO) - Apply Calc Rule	C

4.2.2.2 C2M.Manage Meter Charges

Algorithm Type
Bookmark
Duplicate
Delete

Main

Algorithm Type
CI-NOPROR

Description
No Proration

Detailed Description

This override proration factors algorithm prevents a calculation rule from being prorated.

If the standard proration logic does not satisfy your implementations requirements, an override proration algorithm may be specified to calculate the proration factors required. This algorithm can be referenced on either the calc rule BO, or on the parent calc rule BO if the override proration applies to all rates. In addition, ensure that override proration is set to true on the calculation rule(s).

Algorithm Entity
Calc Rule (BO) - Override Proration Factors

Program Type
Plug-In Script

Plug-in Script
CI-NoPror
No Proration

	Sequence	Parameter	Required	Owner
+	*		<input type="checkbox"/>	

Algorithm Type
Bookmark
Duplicate
Delete
Clear

Main

Algorithm Type
CI-MS-SQ

Description
Multiply Step by SQ

Detailed Description

This calc rule algorithm is used to change a "stepped" SQ high and/or low boundaries by multiplying each by the value of a UOM/TOU/SQ.

Whether the multiplication is performed against the Low, High, or Both boundaries is controlled by the value of parameter 4.


If the UOM/TOU/SQ contains the number of days in the billing period (some organizations have dynamic steps that are calculated based on the number of days in the billing period), set Prorate to N because you do not want the algorithm to prorate the steps (because they will be prorate automatically when they are multiplied by the number of days in the billing period). Otherwise, Prorate should be set to Y.

Algorithm Entity
Calc Rule - Step Multiplier


Program Type
Plug-In Script

Plug-in Script
CI-MultStpSQ
Multiply Step by SQ


	Sequence	Parameter	Required	Owner
+	*	1 Unit of Measure	<input type="checkbox"/>	Customer Care and Billing
+	*	2 Time of Use	<input type="checkbox"/>	Customer Care and Billing
+	*	3 Service Quantity Identifier	<input type="checkbox"/>	Customer Care and Billing
+	*	4 Manipulate Low, High, Both	<input checked="" type="checkbox"/>	Customer Care and Billing
+	*	5 Prorate - Y or N	<input checked="" type="checkbox"/>	Customer Care and Billing

Algorithm Type Search		
Search By Algorithm Type Information ▾		
Expand Filters Filters: Algorithm Entity Calculation Rule - Derive Value		
	Algorithm Type	Description 
1	C1BILLCRED	Bill Credits For Electric Consolidated Billing
2	C1-CALCBLDYS	Calculate usage days
3	C1CALCDA	Calculate Characteristic Type/ Value if Service Agreement Relationship Types Exist
4	C1-GETNBRMTR	Return Number of Meters
5	C1MDMACRED	MDMA Credits
6	C1MOMSCRED	Meter Ownership and MSP Credits
7	C1SEASDAY	Seasonal Days in a Billing Period
8	C2M-ACCQTY	Accumulate Billable Quantities
9	C2M-CALOTHBS	Calculate Other Bill Segment
10	C2MGETCATAMT	Derive value given target category type/value

Bill Segment – Get Consumption Algorithms

Algorithm Type Search					
Search By		Algorithm Type Information ▼			
Expand Filters		Filters: Algorithm Entity Bill Segment Type - Get Consumption			
	Algorithm Type	Description 	Algorithm Entity	Script	Detailed Description
1	BSGC-MS	Get Consumption From Master Bill Segment	Bill Segment Type - Get Consumption		This algorithm should only be specified on bill segment types that are specified on SA types associated with the SA.
2	BSGC-SP	Get Consumption From SP's Linked To SA	Bill Segment Type - Get Consumption		This algorithm is used to get consumption from the SPs linked to the SA. Use this algorithm for SAs.
3	C1-BSGC-USG	Get bill segment consumption using a usage request	Bill Segment Type - Get Consumption		This Bill Segment Type Get Consumption algorithm should only be specified on bill segment types used with the C1-BSGC-USG algorithm.

Adjustment Generation Apply Rate Algorithm

Algorithm Type Search					
Search By		Algorithm Type Information ▼			
Expand Filters		Filters: Algorithm Entity Adjustment Type - Generate Adjustment			
	Algorithm Type	Description 	Algorithm Entity	Script	Detailed Description
1	ADJG-RT	Adjustment Generation - Apply Rate	Adjustment Type - Generate Adjustment		This adjustment generation algorithm is used to calculate an adjustment by calling rate application.
2	C1-ADJG-WO	Generate Adjustment - Write Off Bills	Adjustment Type - Generate Adjustment		This adjustment generation algorithm is used to generate a write off adjustment for a given FT based on the C1-ADJG-WO algorithm.

Account/Autopay

Account

Bookmark

Clear

Save

Refresh

Main

Auto Pay

Persons

Financial Balances

Bill Messages

C & C

Budget

Deposits

Characteristics

Alerts

Account Portal

Account

Mark,Brazil, Residential, \$0.00

Account ID 0221264307 2

Account Auto Pay

"1" of "1"

Start Date

01-01-2017

End Date

Auto Pay ID

0226302876

Auto Pay Source

* 789456124-C Bank of America - Checking 789456124

External Account ID

* *****4520

Expires On

/

Name

* Frank,Ellie

Maximum Withdrawal Amount

\$0.00

Comments

Account Financial History

Account Financial History

Main

Account Financial History ⓘ

Search By
Arrears Date

Expand Filters

	Arrears Date	Financial Transaction Type	Current Amount	Current Balance	Payoff Amount	Payoff Balance
1	04-12-2017	Pay Segment	\$-120.01	\$0.00	\$-120.01	\$0.00
2	04-01-2017	Bill Segment	\$120.01	\$120.01	\$120.01	\$120.01
3	03-13-2017	Pay Segment	\$-99.25	\$0.00	\$-99.25	\$0.00
4	03-01-2017	Bill Segment	\$99.25	\$99.25	\$99.25	\$99.25
5	02-13-2017	Pay Segment	\$-113.23	\$0.00	\$-113.23	\$0.00
6	02-01-2017	Bill Segment	\$113.23	\$113.23	\$113.23	\$113.23

Billing History

SA Billing History

Bookmark

Clear

Save

Refresh

Main

Account ID

0221264307

Mark,Brazil, Residential, \$0.00

SA Information

California / Electric Residential, ERES1, Active, 01-01-2017, Single-family / electric heat discount, 0226899702

SA ID

0226899702

	Start Date	End Date	Days	Status	Current Amount	Payoff Amount	UOM	Billable Service Quantity	Average Daily Service Quantity
	03-01-2017	04-01-2017	31	Frozen	\$120.01	\$120.01	Kilowatt-Hours	1155.000000	37.26
	02-01-2017	03-01-2017	28	Frozen	\$99.25	\$99.25	Kilowatt-Hours	944.000000	33.71
	01-01-2017	02-01-2017	32	Frozen	\$113.23	\$113.23	Kilowatt-Hours	1086.000000	33.94

Account/Credit & Collection

Account

Bookmark

Clear

Save

Refresh

Main

Auto Pay

Persons

Financial Balances

Bill Messages

C & C

Budget

Deposits

Characteristics

Alerts

Account Portal

Account

Mark,Brazil, Residential, \$0.00

Account ID 0221264307 2

Collection Class

Residential

Postpone Credit Review Until

01-01-2020

Last Credit Review Date

09-07-2023

Current Credit Rating

1000

Current Cash Only Score

400

Credit Rating History

New

Start Date

Credit Rating History ID

End Date

Affect Credit Rating By

Affect Cash-Only Score By

Comments

360 View

360 View – Measuring Component

360 Degree View

Search by Name
Sea

Measuring Component
Device
Service Point
Usage Subscription
Contact

Measuring Component Overview

Measuring Component [ER-1000012 / Electric Scalar kWh - Manual Read](#) ✓

Service Point [100 Switch Back Road, Apt. 105, Fremont, CA, 94516 / Electric Residential / Electric / ER-1000012 / Read Cycle 01, Route 120 / Active](#) ✓

Installation [Install Date/Time: 01-01-2017 0:00:00 PST / On](#)

Usage Subscription [Mark,Brazil / Home Phone \(415\) 093-7829 / Electric - Residential / 01-01-2017 0:00:00 PST / Active](#) ✓

Device Configuration Overview ⓘ

	Type	Information ⓘ	360	
1	Manual Meter	ER-1000012 / Electric Manual Read Meter - Digital / Install Date/Time: 01-01-2017 0:00:00 PST / On / Active ✓		
2	Device Configuration	Electric Manual Read Meter - Digital / Effective Date/Time:01-01-2017 0:00:00 PST / Electric Manual Read - kWh - Scalar / 1 Measuring Component(s) / Active ✓		New Reading
3	Register ☆	ER-1000012 / Electric Scalar kWh - Manual Read ✓	<div>360</div>	
4	Service Point - MDM	100 Switch Back Road, Apt. 105, Fremont, CA, 94516 / Electric Residential / Electric / ER-1000012 / Read Cycle 01, Route 120 / Active ✓	<div>360</div>	Install Date/Time: 01-01-2017 0:00:00 PST / On

Final Values Overlay ⓘ

Parameters ⓘ

Measuring Component [ER-1000012 / Electric Scalar kWh - Manual Read](#) ✓

360 View – Device

360 Degree View

Search by Name

S

Measuring Component

Device

Service Point

Usage Subscription

Contact

Device Overview

Device

ER-1000012 / Electric Manual Read Meter - Digital / Install Date/Time: 01-01-2017 0:00:00 PST / On / Active

Service Point

100 Switch Back Road, Apt. 105, Fremont, CA, 94516 / Electric Residential / Electric / ER-1000012 / Read Cycle 01, Route 120 / Active

Installation

Install Date/Time: 01-01-2017 0:00:00 PST / On

Usage Subscription

Mark,Brazil / Home Phone (415) 093-7829 / Electric - Residential / 01-01-2017 0:00:00 PST / Active

Device Configuration Overview

	Type	Information	360	
1	Manual Meter	ER-1000012 / Electric Manual Read Meter - Digital / Install Date/Time: 01-01-2017 0:00:00 PST / On / Active		
2	Device Configuration	Electric Manual Read Meter - Digital / Effective Date/Time:01-01-2017 0:00:00 PST / Electric Manual Read - kWh - Scalar / 1 Measuring Component(s) / Active		New Reading
3	Register	ER-1000012 / Electric Scalar kWh - Manual Read	360	
4	Service Point - MDM	100 Switch Back Road, Apt. 105, Fremont, CA, 94516 / Electric Residential / Electric / ER-1000012 / Read Cycle 01, Route 120 / Active	360	Install Date/Time: 01-01-2017 0:00:00 PST / On

Scalar Readings

Filters: Device 215409500484

	Read Date Time	Edit	Do Not Use
1	Meter: 215409500484, Read Date: 04-01-2017 1:00:00 PDT, 1 register read, Reading: 3185, Condition: Regular		Do Not Use
2	Meter: 215409500484, Read Date: 03-01-2017 0:00:00 PST, 1 register read, Reading: 2030, Condition: Regular		Do Not Use
3	Meter: 215409500484, Read Date: 02-01-2017 0:00:00 PST, 1 register read, Reading: 1086, Condition: Regular		Do Not Use
4	Meter: 215409500484, Read Date: 01-01-2017 0:00:00 PST, 1 register read, Reading: 0, Condition: Regular		Do Not Use

4.2.2.2 C2M.Manage Meter Charges

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360 View – Usage Subscription

360 Degree View

Search by Name

Measuring Component
Device
Service Point
Usage Subscription
Contact

Usage Subscription Overview

Usage Subscription [Mark,Brazil / Home Phone \(415\) 093-7829 / Electric - Residential / 01-01-2017 0:00:00 PST / Active](#)

Main Customer [Mark,Brazil / Home Phone \(415\) 093-7829](#)

Service Point [100 Switch Back Road, Apt. 105, Fremont, CA, 94516 / Electric Residential / Electric / ER-1000012 / Read Cycle 01, Route 120 / Active](#)

Usage Transaction History

Filters: Usage Subscription 707368544129

	Start Date/Time	End Date/Time	Information	Number of Days
1	04-01-2017 1:00:00 PDT	02-02-2020 2:00:00 PST	Issue Detected / 04-01-2017 1:00:00 PDT - 02-02-2020 2:00:00 PST / Electric - Simple	1037
2	03-01-2017 0:00:00 PST	04-01-2017 1:00:00 PDT	Sent / 03-01-2017 0:00:00 PST - 04-01-2017 1:00:00 PDT / Electric - Simple	31
3	02-01-2017 0:00:00 PST	03-01-2017 0:00:00 PST	Sent / 02-01-2017 0:00:00 PST - 03-01-2017 0:00:00 PST / Electric - Simple	28
4	01-01-2017 0:00:00 PST	02-01-2017 0:00:00 PST	Sent / 01-01-2017 0:00:00 PST - 02-01-2017 0:00:00 PST / Electric - Simple	31

Timeline

February 2017

	Dec 2016	Jan 2017	Feb 2017	Mar 2017	Apr 2017	May 2017	Jun 2017	Jul 2017
Usage Transactions (3)			1	1	1			
Activities (1)		1						
Initial Measurements with VEE Exceptions (0)								
Device Events (0)								

360 View – Contact

360 Degree View

Measuring Component
Device
Service Point
Usage Subscription
Contact

Contact Overview

Contact

Mark,Brazil / Home Phone (415) 093-7829

Primary Name

Mark,Brazil

Home

(415) 093-7829

Primary Email

mark.brazil@ymail.com

External ID


0275489026

Service Points Referencing Contact ⓘ

Filters: Contact ID 156205192488

Contact's Usage Subscriptions ⓘ

Filters: Contact ID 156205192488

	Usage Subscription 	Relationship Type
1	Mark,Brazil / Home Phone (415) 093-7829 / Electric - Residential / 01-01-2017 0:00:00 PST / Active	Main Customer

Usage Request

Usage Request - Main

Usage Request: California / Electric Residential, Bill Determinants Processed, 03-01-2017 - 04-01-2017

Search
Bookmark
Refresh

Main
Log

Usage Request

Main
Record Information

Information

California / Electric Residential, Bill Determinants Processed, 03-01-2017 - 04-01-2017

Status

Bill Determinants Processed

Account

Mark,Brazil, Residential, \$0.00

Service Agreement

California / Electric Residential, ERES1, Active, 01-01-2017, Single-family / electric heat discount, 0226899702

Bill Segment

California / Electric Residential, Frozen, Period: 03-01-2017 - 04-01-2017, \$120.01, 0226899702

Accounting Date

04-01-2017

Usage Request Details

Previous Usage

California / Electric Residential, Bill Determinants Processed, 02-01-2017 - 03-01-2017

Bill Condition

Interim

Interval Processing Information

Start Date/Time

03-01-2017 0:00:00 PST

End Date/Time From

04-02-2017 2:00:00 PDT

End Date/Time To

04-02-2017 2:00:00 PDT

Usage Response Details

Usage Start Date/Time

03-01-2017 0:00:00 PST

Usage End Date/Time

04-01-2017 1:00:00 PDT

Estimated

☐

SA Skipped

☐

Usage Periods

Period

03-01-2017 0:00:00 PST - 04-01-2017 1:00:00 PDT (Scalar)

Standard Period

03-01-2017 0:00:00 - 04-01-2017 0:00:00

Sequence	UOM	TOU	SQ	Quantity	Seconds Per Interval	SQ Highlight
1	Kilowatt-Hours			1,155.000000	00:00:00	

Scalar Processing Information

Start Date/Time

03-01-2017 0:00:00 PST

End Date/Time

04-01-2017 23:59:59 PDT

End Date/Time From

Billing Option

Use Cut off Date

Minimum Offset Days

5

Maximum Offset Days

5

Allow Estimates

☐

Estimate Date

Exception Details

Messages

Usage Request - Log

Usage Request: California / Electric Residential, Bill Determinants Processed, 03-01-2017 - 04-01-2017

Main

Log

Usage Request Log

Filters: Usage ID 022321102536

	Date/Time	Details	User	Log Type	Related Object
1	04-01-2017 12:07:01	Transitioned to Bill Determinants Processed.	System , English (SYSUSER)	Status Transition	
2	04-01-2017 12:07:01	Transitioned to Bill Determinants Received.	System , English (SYSUSER)	Status Transition	
3	04-01-2017 12:07:00	Transitioned to Awaiting Bill Determinants.	Murray , Lynette (LMURRAY)	Status Transition	
4	04-01-2017 12:07:00	Transitioned to Send Request.	Murray , Lynette (LMURRAY)	Status Transition	
5	04-01-2017 12:07:00	Transitioned to Awaiting Data Sync.	Murray , Lynette (LMURRAY)	Status Transition	
6	04-01-2017 12:07:00	Created in status Pending.	Murray , Lynette (LMURRAY)	Created	