



C2M v2.9

4.3.2.3a Manage Pay Plan

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TEST DOCUMENTATION RELATED TO THE CURRENT PROCESS..... **ERROR! BOOKMARK NOT DEFINED.**

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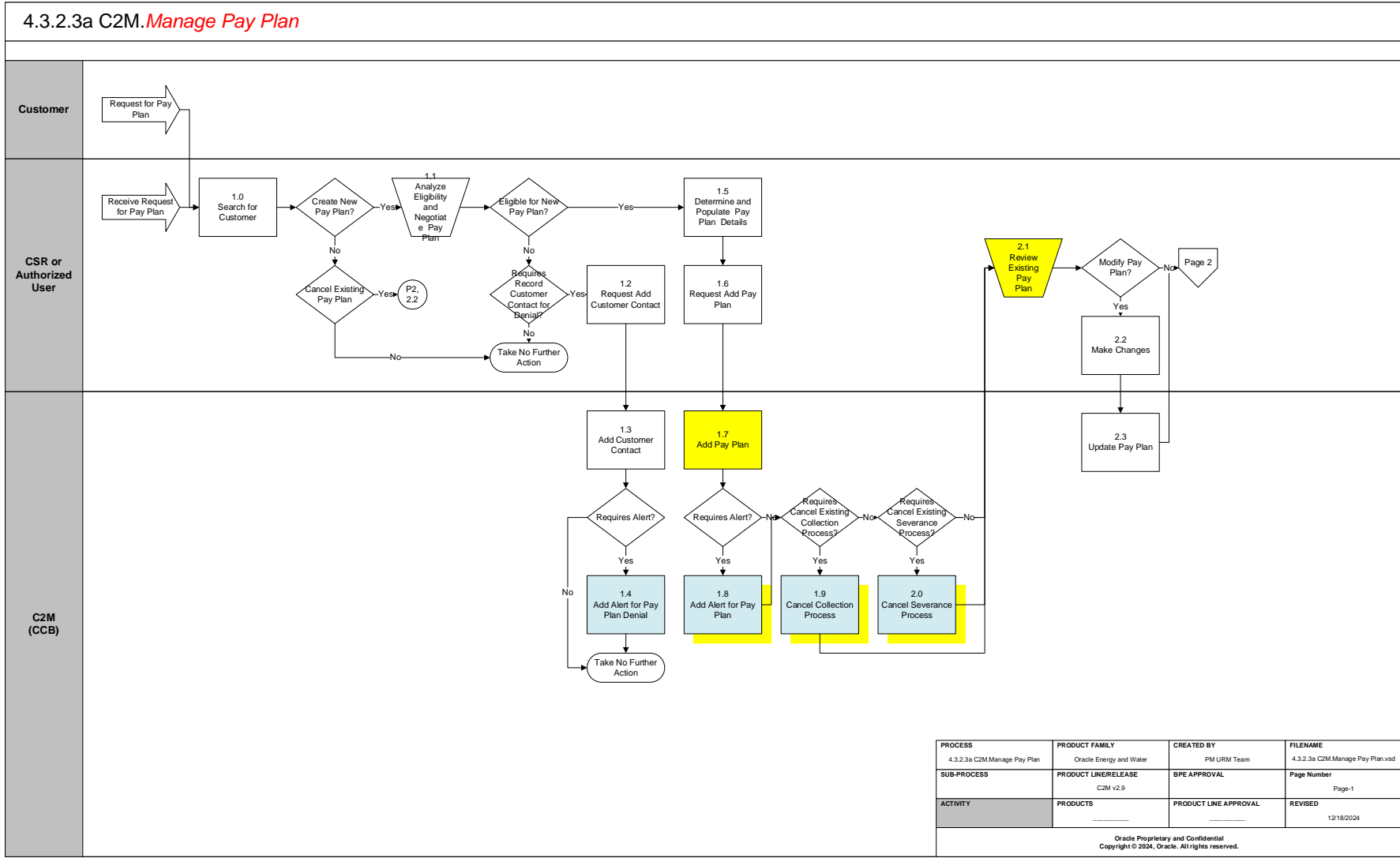
Brief Description

Business Process:	4.3.2.3a C2M.Manage Pay Plan
Process Type:	Sub Process
Parent Process:	4.3.2 C2M.Perform Collection Activities
Sibling Processes:	4.3.2.1 C2M.Manage Collection process, 4.3.2.2 C2M.Manage Severance Process, 4.3.2.4a C2M.Manage Payment Arrangement, 4.3.2.5a C2M.Manage LPC, 4.3.2.6 C2M.Write-off Uncollectable Receivables, 4.3.2.7 C2M.Manage Collection Agency Referral

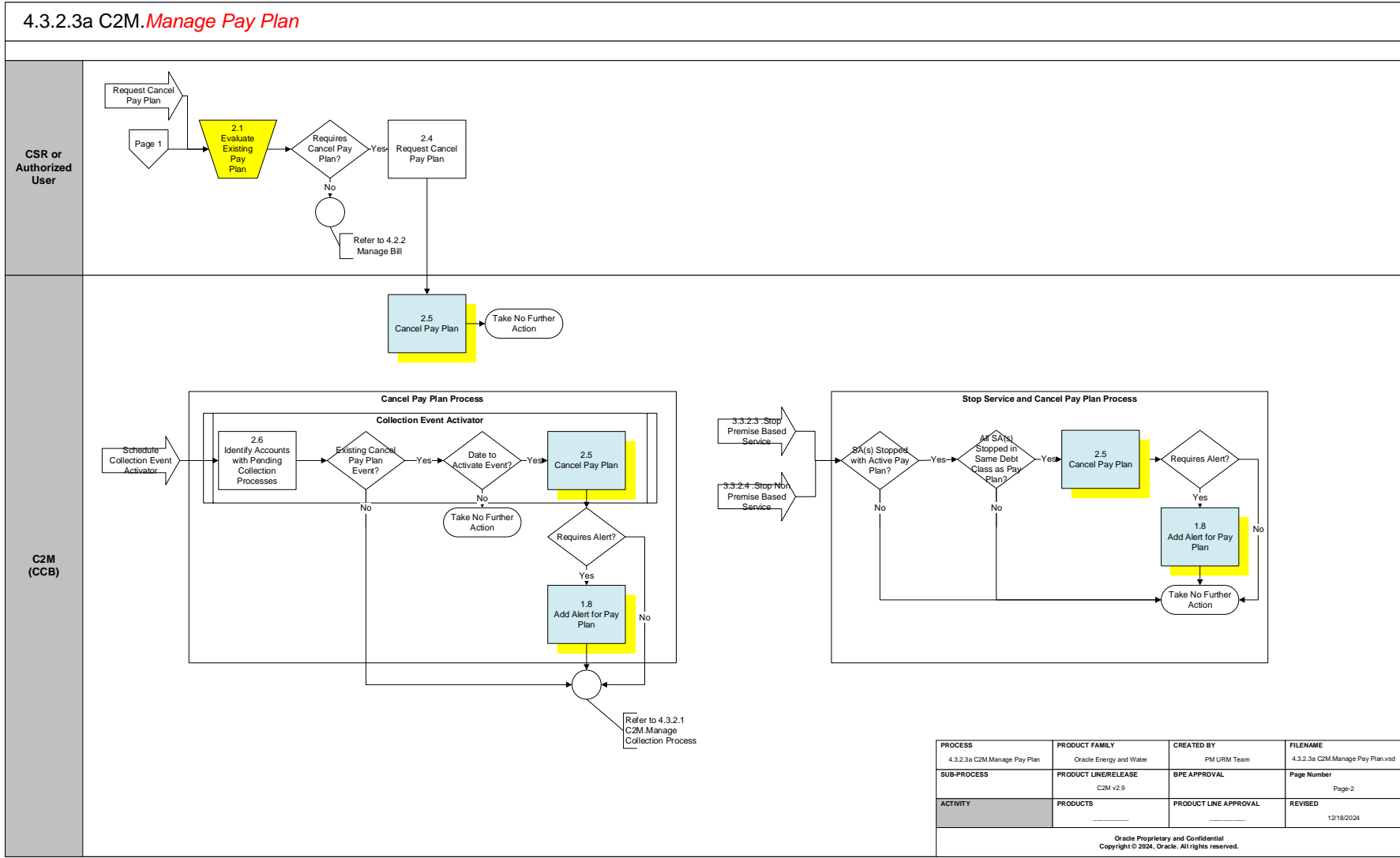
This process describes how the Pay Plan functionality is used to assist customers in managing their bills. The customer makes payments on specific dates that are outside the normal billing due dates. These scheduled dates are not included with the regular periodic bill. The pay plan can be placed on Autopay using the scheduled payment dates.

The Credit and Collection processes monitor the payment scheduled dates for the [Pay Plan](#) and provides follow up based on configured business rules.

Business Process Model Page 1

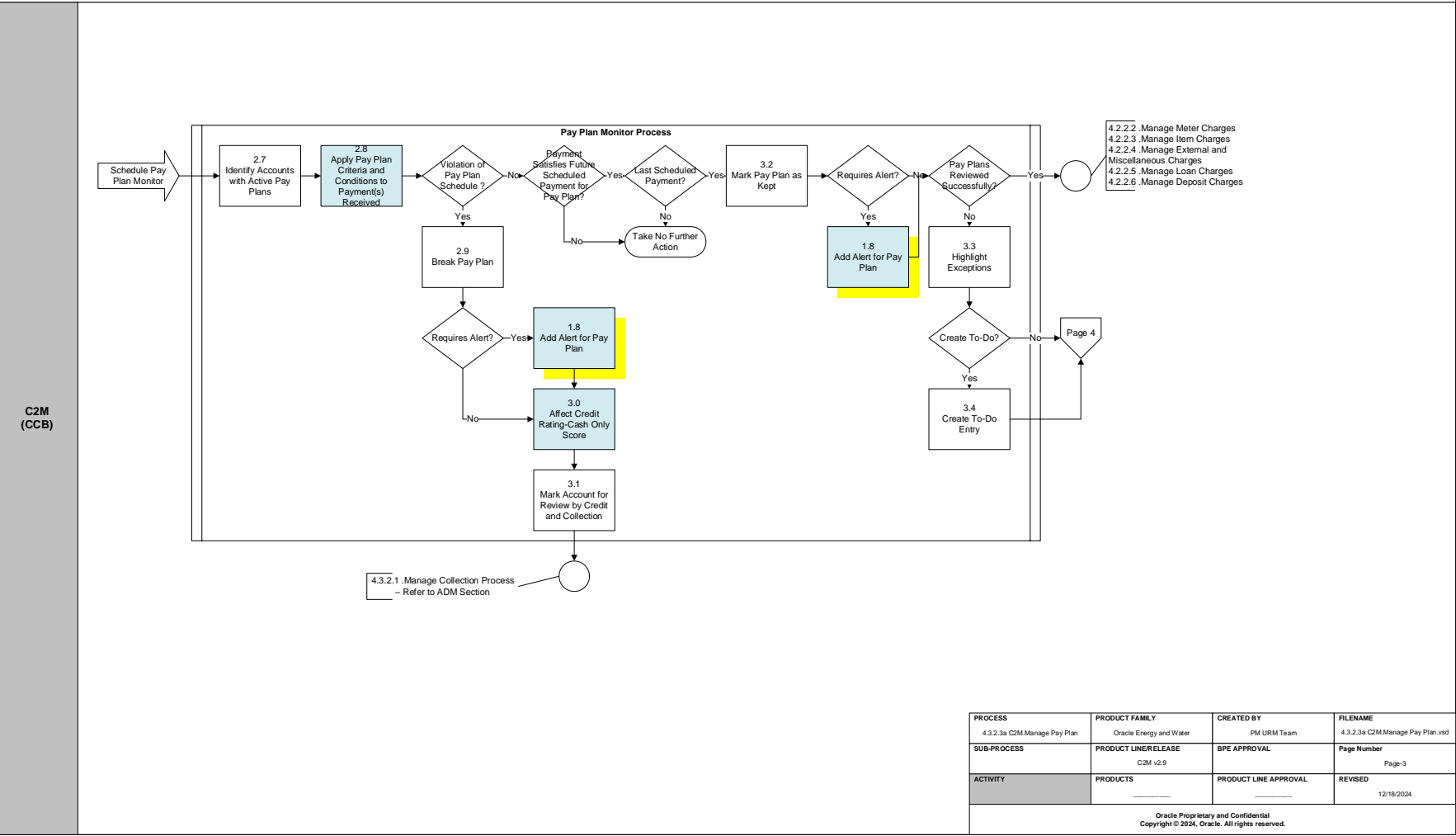


Business Process Model Page 2

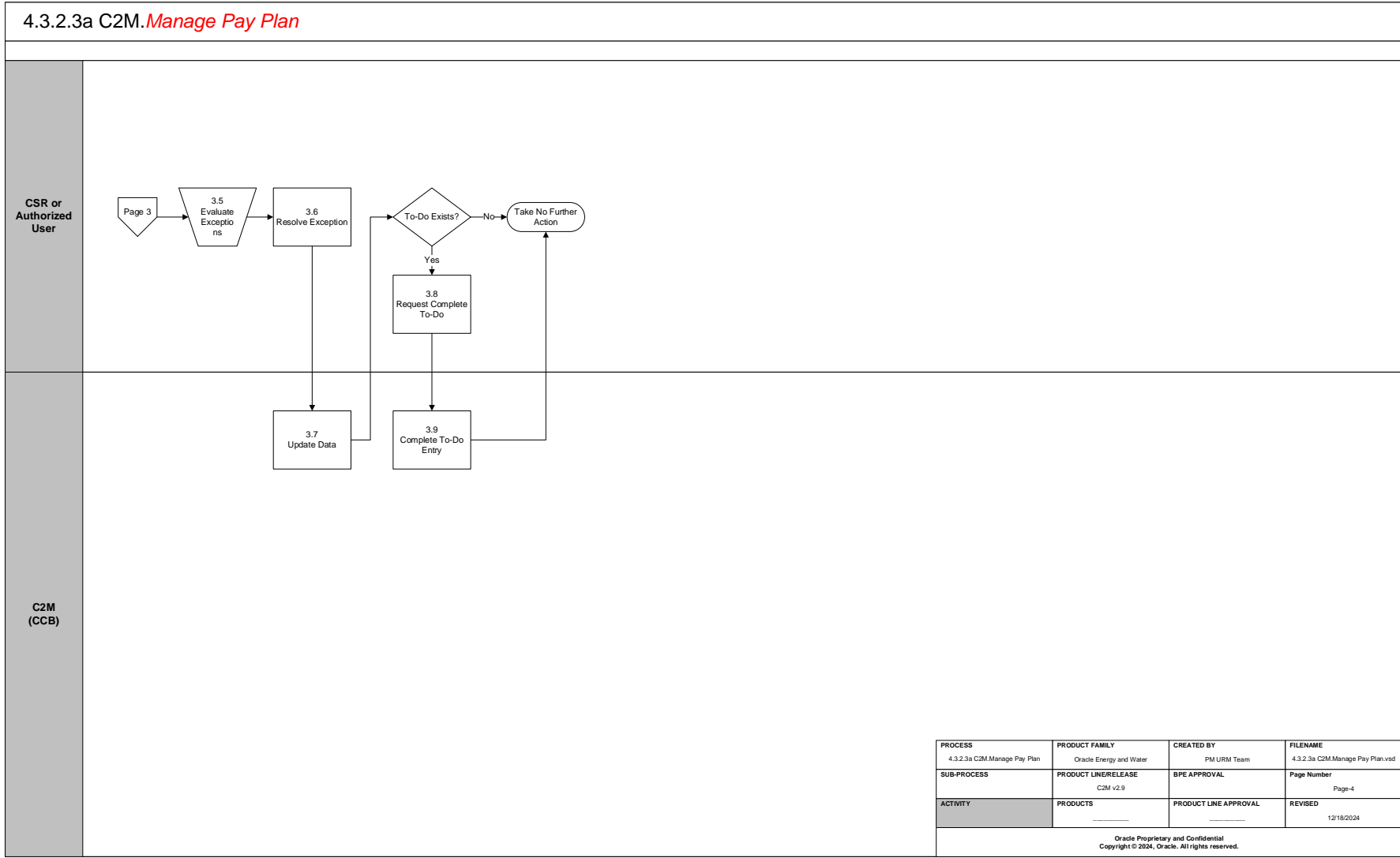


Business Process Model Page 3

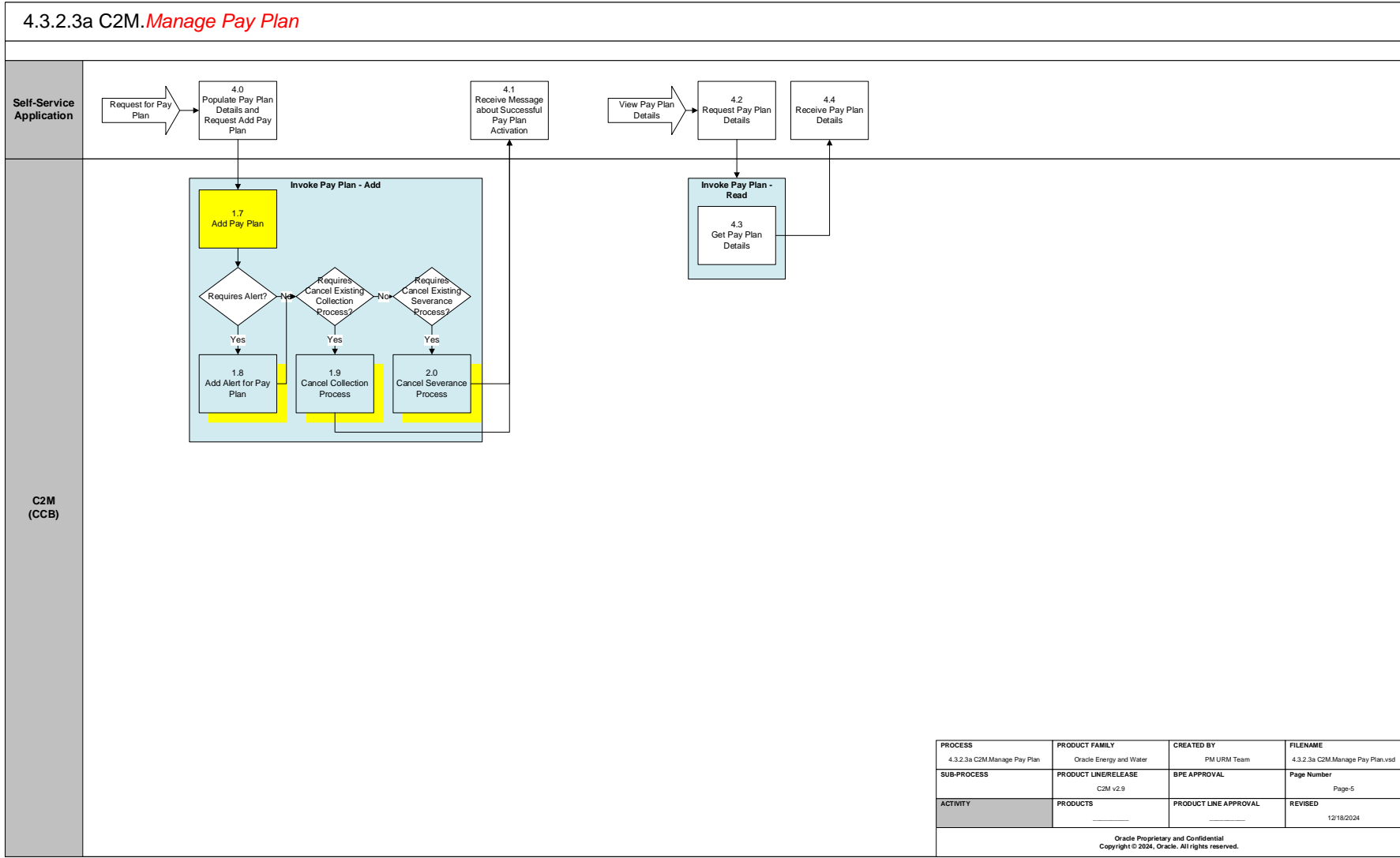
4.3.2.3a C2M.Manage Pay Plan



Business Process Model Page 4



Business Process Model Page 5



Detail Business Process Model Description

1.0 Search for Customer

Actor/Role: CSR or Authorized User

Description:

Upon receipt of a request to start a [Pay Plan](#), the CSR or Authorized User locates the customer in C2M(CCB) using [Control Central Search](#). When a customer is selected, the CSR or Authorized User is automatically transferred to Control Central – Account Information refreshed with the selected customer’s data. [Dashboard](#) Alerts provide the CSR or Authorized User with pertinent information about the customer.

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

Installation Options – PERS-INFO-LF Person Information, Installation Options
C1-ACCT-INFO – Account Information
NMFM-VALFMT - Person Name Validation
C2M-PERCTINF - Person Contact Info Formatter
Installation Options – Control Central Alerts

Configuration required Y Entities to Configure:

Installation Options

1.1 Analyze Eligibility and Negotiate Pay Plan

Actor/Role: CSR or Authorized User

Description:

Most organizations have business rules or procedures to follow when negotiating settlement of debt. These procedures are part of the negotiation or discussion with the customer. A customer on a [Pay Plan](#) may or may not have overdue debt. Typically, the CSR or Authorized User reviews the customer’s [Account Financial History](#), [Billing History](#), and [Credit and Collection](#) information prior to initiating a Pay Plan. The CSR or Authorized User reaches an agreement with the customer for scheduled payments over a given time period.

Configuration required Y Entities to Configure:

Pay Plan Type
Pay Method

1.2 Request Add Customer Contact

Actor/Role: CSR or Authorized User

Description:

Based on established business rules the Pay Plan may be denied. A Customer Contact may be required. Refer to 3.4.1.1 C2M.Manage Customer Contacts.

Configuration required Y Entities to Configure:

Customer Contact Class

Customer Contact Type

1.3 Add Customer Contact

Actor/Role: C2M(CCB)

Description:

The Customer Contact is added in C2M(CCB). Refer to 3.4.1.1 C2M.Manage Customer Contacts.

Configuration required Y Entities to Configure:

Customer Contact Class
Customer Contact Type

1.4 Add Alert for Pay Plan Denial

Actor/Role: C2M(CCB)

Description:

If configured, C2M(CCB) can display a [Control Central Alert](#) for a number of [Pay Plan](#) denials for a Customer within a given time period. Alert Types can also be configured and manually added to an Account.

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

CI_PPDENIAL (CC BY TYPCL) - This control central alert algorithm counts the number of Customer Contacts for a given Contact Type and Contact Class, whose create date is within the last X days (X being the Number of Days Cutoff) and displays an appropriate alert on control central
--

Configuration required Y Entities to Configure:

Customer Contact Class
Customer Contact Type
Installation Options – Control Central Alerts
Alert Type

1.5 Determine and Populate Pay Plan Details

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User enters the required Pay Plan Information including the Pay Plan Type and Start Date, Pay Method, Third Party Payor if any, and scheduled payment dates and amounts.

Configuration required Y Entities to Configure:

Pay Plan Type
Third Party Payor
Pay Method

1.6 Request Add Pay Plan

Actor/Role: CSR or Authorized User

Description:

When the CSR or Authorized User has all the necessary Pay Plan information in place, they save the record.

1.7 Add Pay Plan Group: Invoke Pay Plan - Add

Actor/Role: C2M(CCB)

Description:

The Pay Plan is added in C2M(CCB). If configured a [Control Central Alert](#) is displayed when there is an Active [Pay Plan](#). User defines pay method for an active Pay plan. Each pay method can be configured with a grace period. A scheduled payment is considered to be missed if payment is made beyond scheduled date + grace period for the pay method defined on pay plan.

Process Plug-in Enabled Y	Available Algorithm(s):	PP-ACTIVE - Show count of ACTIVE pay plans
Configuration required Y	Entities to Configure:	Pay Plan Type
		Installation Options
		Pay Method
Process Plug-in enabled (Y/N)	Scripts(s):	C1PayPlan - Pay Plan Service
	Web Service(s):	C1-PayPlan- Pay Plan

1.8. Add Alert for Pay Plan Group: Cancel Pay Plan Process

Group: Stop Service and Cancel Pay Plan Process

Group: Pay Plan Monitor

Group: Invoke Pay Plan - Add

Actor/Role: C2M(CCB)

Description:

The Pay Plan is added in C2M(CCB). If configured a Control Central Alert is displayed when there is an Active, Kept, Canceled or Broken Pay Plan. The system will also keep track of the number of Pay Plans and statuses within a given time period.

Process Plug-in Enabled Y	Available Algorithm(s):	(C1-PP-ACTIVE (PP BY STATUS) - Show count of ACTIVE pay plans
		(C1-PP-BROKEN (PP BY STATUS) - Show count of BROKEN pay plans
		C1-PP-KEPT (PP BY STATUS) - Show count of KEPT pay plans
Configuration required Y	Entities to Configure:	

Pay Plan Type
Installation Options

1.9 Cancel Collection Process Group: Invoke Pay Plan - Add

Actor/Role: C2M(CCB)

Description:

If configured, C2M(CCB) cancels an existing Collection Process. When a Pay Plan is activated, the system sums and compares the arrears balances of all Service Agreements in the Debt Class, to the Pay Plan’s Override Arrears criteria and Debt Class Cancellation Threshold. If the adjusted arrears are less than or equal to the cancellation threshold, the Collection Process is canceled. Refer to 4.3.2.1 C2M.Manage Collection Process.

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

C2M-COLL-CAN (DC COLL CAN) - Cancel collection process if ALL debt <= \$25
C1-PPOVRDARS (PP OVRD ARS) - Override arrears using pay plans schedule Payments.

Configuration required Y Entities to Configure:

Debt Class
Pay Plan Type
Collection Process Template

2.0 Cancel Severance Process Group: Invoke Pay Plan - Add

Actor/Role: C2M(CCB)

Description:

If configured C2M(CCB) cancels an existing Severance Process. When a [Pay Plan](#) is activated, the system sums and compares the arrears balances of all Service Agreements in the Debt Class, to the Pay Plan’s Override Arrears Algorithm and Debt Class Cancellation Threshold. If the adjusted arrears is less than or equal to the cancellation threshold, the Severance Process is canceled. Refer to 3.4.2.2 C2M.Manage Severance Process.

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

C2M-SEV-CAN (DC SEV CAN) - Cancel severance process if ALL debt <= \$30.
C1-PPOVRDARS (PP OVRD ARS) - Override arrears using pay plans schedule Payments.

Configuration required Y Entities to Configure:

Debt Class
Pay Plan Type
Collection Process Template

2.1 Review Existing Pay Plan

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User reviews and evaluates an existing Pay Plan to confirm accuracy. At times it may be necessary to cancel a Pay Plan. The customer may not want to make use of the Pay Plan any longer or there may be other business reasons to cancel the Pay Plan.

2.2 Make Changes

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User makes required changes based on established business rules.

2.3 Update Pay Plan

Actor/Role: C2M(CCB)

Description:

The Pay Plan is updated in C2M(CCB) and reflects changes made. System updates the id of the user who last modified the pay plan and the date and time on which it was changed.

2.4 Request Cancel Pay Plan

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User determines to cancel the Pay Plan.

2.5 Cancel Pay Plan Group: Cancel Pay Plan Process

Group: Collection Event Activator

Group: Stop Service and Cancel Pay Plan Process

Actor/Role: C2M(CCB)

Description:

The Pay Plan is transitioned to the Canceled status in C2M(CCB). Refer to 4.3.2.1 C2M.Manage Collection Process.

Manual process: C2M(CCB) cancels the Pay Plan upon user request.

Automated process: C2M(CCB) automatically cancels Pay Plan as part of Collection Process (Cancel Pay Plan collection event).

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

CI_CAN_PP (COLL CAN PP) - This collection event algorithm cancels any active payment plans associated with the collection process's debt class.

Customizable process N Process Name:

CET - Collection event trigger

Configuration required Y Entities to Configure:

Collection Process Template
Collection Event Template

2.6 Identify Accounts with Pending Collection Processes Group: Cancel Pay Plan Process

Group: Collection Event Activator

Actor/Role: C2M(CCB)

Description:

The background process, Collection Event Activator, reviews accounts with pending Collection Processes to determine if any Collection Events to cancel the Pay Plan exists, and checks the activation date. Collection Events that meet these criteria will be activated, and associated Pay Plans canceled. Refer to 4.3.2.1 C2M.Manage Collection Process.

Process Plug-in Enabled Y	Available Algorithm(s):	CI_CAN_PP (COLL CAN PP) - This collection event algorithm cancels any active payment plans associated with the collection process's debt class.
Customizable process N	Process Name:	CET - Collection event trigger
Configuration required Y	Entities to Configure:	Collection Process Template
		Collection Event Template

2.7 Identify Accounts with Active Pay Plans Group: Pay Plan Monitor Process

Actor/Role: C2M(CCB)

Description:

The background process, Pay Plan Monitor, selects Accounts with Active Pay Plans to determine if the Pay Plans’ scheduled payments are met and to update the status of the Pay Plan. If all scheduled payments are met on time, the Pay Plan is transitioned to a Kept status. If the scheduled payments are not made on time, the Pay Plan Monitor changes the status to broken, marks the account for Credit and Collection review, and can update the customer’s credit history.

Process Plug-in Enabled Y	Available Algorithm(s):	CI_PPM_GR - Create Pending Pay Plan Monitor Job
Customizable process N	Process Name:	PPM - Pay Plan Monitor
Configuration required Y	Entities to Configure:	Feature Configuration

2.8 Apply Pay Plan Criteria and Conditions to Payment(s) Received Group: Pay Plan Monitor Process

Actor/Role: C2M(CCB)

Description:

The system collects all frozen non-cancelled payments associated to the account and same debt class. The payment dates must be after the start date of the Pay plan and associated with the Pay Plan’s identified Payor. The system compares scheduled payments to actual payments to confirm scheduled payments were made on a timely basis.

Process Plug-in Enabled Y	Available Algorithm(s):	C1-PPOVRDARS (PP OVRD ARS) - This algorithm takes the arrears balances of an account's debt class,
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Customizable process N Process Name:

and adjusts/reduces them by the amount of the scheduled payments for pay plans of the same debt class.

Configuration required Y Entities to Configure:

PPM - Pay Plan Monitor
Pay Plan
Pay Method

2.9 Break Pay Plan Group: Pay Plan Monitor

Actor/Role: C2M(CCB)

Description:

If the system cannot find payments that meet the scheduled pay dates for the Pay Plan, the Pay Plan status is changed to broken.
NOTE: The Pay Plan’s break algorithm for European / Australian pay plans, there are scenarios when the break algorithm causes the pay plan to become unbroken – when there are not at least two missed, historical scheduled payments.

Customizable process N Process Name:

PPM - Pay Plan Monitor

Configuration required Y Entities to Configure:

Pay Plan
Pay Method

3.0 Affect Credit Rating-Cash Only Score Group: Pay Plan Monitor

Actor/Role: C2M(CCB)

Description:

If configured, C2M(CCB) updates the associated Pay Plan’s Account’s credit rating history to reflect that payments were not made according to schedule.

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

CL_BROKENPP (BROKEN PP) - This broken pay plan algorithm inserts a credit rating history record for an account when a pay plan is broken.

Customizable process N Process Name:

PPM - Pay Plan Monitor

Configuration required Y Entities to Configure:

Pay Plan
Pay Method

3.1 Mark Account for Review by Credit and Collection Group: Pay Plan Monitor

Actor/Role: C2M(CCB)

Description:

C2M(CCB) “tags” the account for review by the background process, Account Debt Monitor. The Account Debt Monitor reviews this account the next time the background process is executed.

Customizable process N	Process Name:	PPM - Pay Plan Monitor
Configuration required Y	Entities to Configure:	Pay Plan
		Pay Method

3.2 Mark Pay Plan as Kept Group: Pay Plan Monitor

Actor/Role: C2M(CCB)

Description:

If all scheduled payments are made on time, C2M(CCB) transitions the status of the Pay Plan to Kept.

Customizable process N	Process Name:	PPM - Pay Plan Monitor
Configuration required Y	Entities to Configure:	Pay Plan
		Pay Method

3.3 Highlight Exceptions Group: Pay Plan Monitor

Actor/Role: C2M(CCB)

Description:

If C2M(CCB) is not able to process certain Accounts with Active [Pay Plans](#), an exception record is created.

Customizable process N	Process Name:	PPM - Pay Plan Monitor
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3.4 Create To Do Entry Group: Pay Plan Monitor

Actor/Role: C2M(CCB)

Description:

If configured, C2M(CCB) creates a separate To-Do Entry for the exception record to be reviewed by a CSR or Authorized User.

Customizable process N	Process Name:	PPM - Pay Plan Monitor
Configuration required Y	Entities to Configure:	To-Do Role
		To-Do Entry

3.5 Evaluate Exception

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User reviews the exceptions to determine the cause and possible solutions. Exceptions are typically the result of missing or incomplete information.

3.6 Resolve Exception

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User resolves the error and enters information in C2M(CCB).

3.7 Update Data

Actor/Role: C2M(CCB)

Description:

Information required for resolution is updated in C2M(CCB).

3.8 Request Complete To-Do

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.

3.9 Complete To-Do Entry

Actor/Role: C2M(CCB)

Description:

The To-Do Entry is updated to Complete Status in C2M(CCB).

4.0 Populate Pay Plan Details and Request Add Pay Plan

Actor/Role: Self-Service Application

Description:

The Self-Service Application populate pay plan details and requests to add Pay Plan. This will invoke pay plan web service to create active pay plan in C2M(CCB).

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

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

C1PayPlan – Pay Plan Service

Web Service(s):

C1-PayPlan- Pay Plan

4.1 Receive Message about Successful Pay Plan Activation

Actor/Role: Self-Service Application

Description:

The Self-Service Application receives message about successful pay plan activation.

4.2 Request Pay Plan Details Group: Invoke Pay Plan - Read

Actor/Role: Self-Service Application

Description:

The Self-Service Application requests to view pay plan details.

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

4.3 Get Pay Plan Details Group: Invoke Pay Plan - Read

Actor/Role: C2M(CCB)

Description:

The C2M(CCB) will identify the request and will respond with pay plan details

Process Plug-in enabled (Y/N)

Scripts(s):

C1PayPlan – Pay Plan Service

Web Service(s):

C1-PayPlan- Pay Plan

4.4 Receive Pay Plan Details Group: Invoke Pay Plan - Read

Actor/Role: Self-Service Application

Description:

The Self-Service Application receives and reviews Pay Plan details.

Test Assets related to the Current Process

Testing Asset Sr.No	Use Case	No Of Data sets
1	URM-C2M-4323a-001-Create-Pay-Plan-With-Collection-Process	2
2	URM-C2M-4323a-002-Create-Pay-Plan-With-Severence-Process	2
3	URM-C2M-4323a-003-Cancel-Pay-Plan-Manual	2
4	URM-C2M-4323a-004-Cancel-Pay-Plan-Stop-SA	2
5	URM-C2M-4323a-005-Cancel-Pay-Plan-Batch	2
6	URM-C2M-4323a-006-Transition-Pay-Plan-To-Kept	2
7	URM-C2M-4323a-007-Transition-Pay-Plan-To-Broken	2

Document Control

Change Record

Date	Author	Version	Change Reference
10/22/09	Colleen King	Draft 1a	No Previous Document
10/22/10	Geir Hedman		Updated Title and Content page
11/22/10	Yoko Iwahiro		Update Algorithms and configuration.
12/22/10	Ayelet Lavee		Review before release made minor changes to document and Visio.
2/9/11	Geir Hedman		Updated Document and Visio
9/30/13	Mel Bachmeier	V2.4	Updated Document and Visio
10/11/2013	Galina Polonsky		Reviewed
08/31/17	Joshua Piccott		Updated Document and Visio to v2.6
1/17/2018	Chetan Raut		Updated C2M related changes and algorithms
01/17/2018	Galina Polonsky		Reviewed, Approved
08/23/2018	Jerry Chick		Replaced Visio flows for pages 1, 2, 3, and 4. Numerous grammatical and syntax corrections.
09/30/2018	Galina Polonsky		Reviewed, Approved
6/4/2019	Satya Kalavala		Updated format for v2.7
07/23/2024	Kunal Nerkar		Updated document and visio for C2M v2.9
09/02/2024	Pablo Siegrist		Reviewed
12/17/2024	Galina Polonsky		Reviewed, Approved

Attachments:

Pay Plan

Pay Plan

Main

Bookmark

Clear

Save

Refresh

Pay Plan

04-04-2020, \$104.69, Residential Payment Plan,, Electronic Funds Transfer

Pay Plan ID 1722618650

Account ID

1720589936

Brazil,Mark PP, Residential, \$0.00

Status

Active

Created by

RRADHAKR 04-04-2020 0:00:00

Cancel

Last Updated by

KNERKAR 07-01-2020 6:40:03

Type

RES

Residential Payment Plan

Debt Class

Standard utility debt

Current Balance

\$1.52

Delinquent Debt

\$0.00

Third Party Payor

Payor Account ID

1720589936

Brazil,Mark PP, Residential, \$0.00

Start Date

04-04-2020

Pay Method

Electronic Funds Transfer

Scheduled Payments

	Scheduled Date	Scheduled Amount	Auto Pay Clear
+	07-01-2020	\$40.00	172542274965
+	08-01-2020	\$40.00	
+	09-01-2020	\$24.69	

Total Amount \$104.69

Comments

Alerts

Overpayment exists

Pending Stop

Field Activity Pending

Auto-Pay Active

3 sync request(s) outstanding

1 Active pay plans in the last 12 months

2 day(s) until next bill

Pending Activities Exist

Full Context

Brazil,Mark PP

Brazil,Mark PP, Residential, \$0.00

8510, East Street, San Francisco, CA, 94105

8510, East Street, San Francisco, CA, 94105 / Electric Residential / Electric / SD-DVC-E-MANUAL-80239 / Read Cycle 01, Route 100 / Active

SD-DVC-E-MANUAL-80239 / Electric Manual Read Meter - Digital / Install Date/Time: 01-01-2020 0:00:10 PST / On / Active

SD-DVC-E-MANUAL-80239 / Electric Scalar kWh - Manual Read

Current To Do

Assign me a To Do

Control Central Search

Control Central Search

Bookmark

Refresh

Main

Control Central Search

Search By

Name and Address

Name

Brazil,mark

Address

City

Postal

CIS Division

Show All Premises

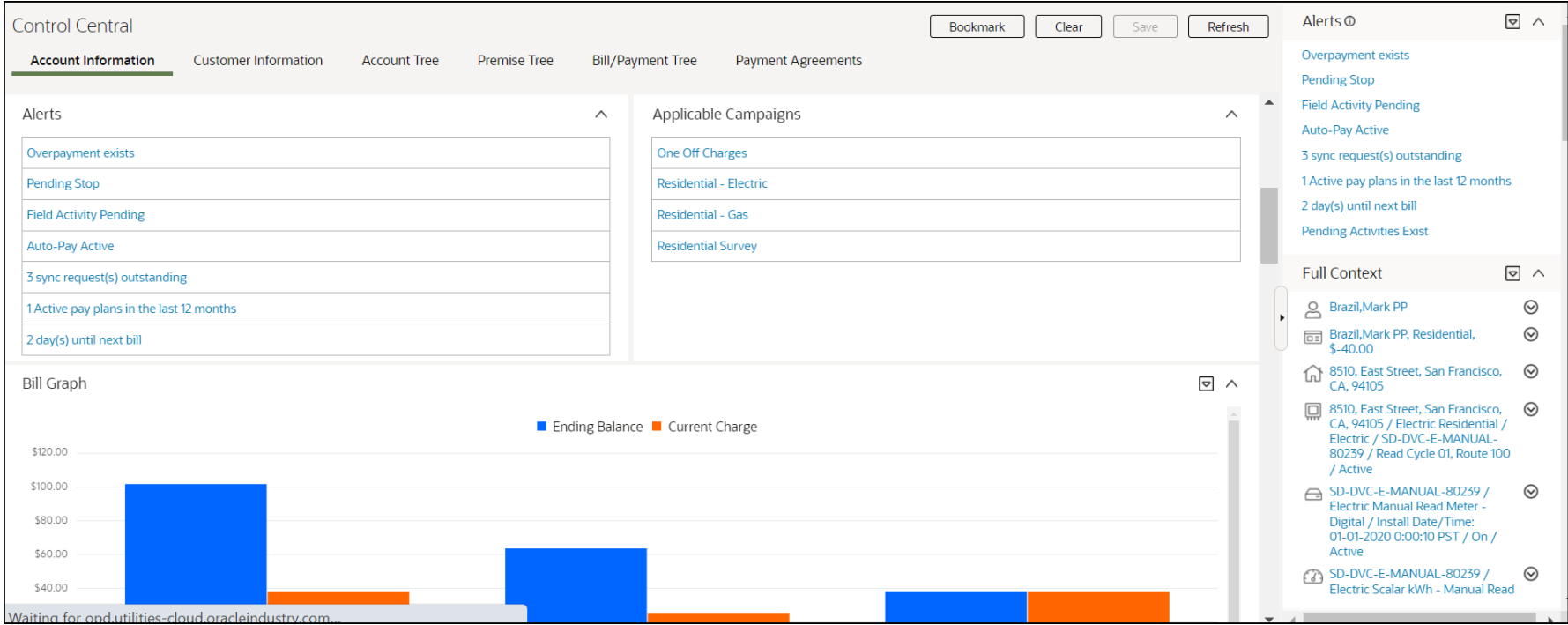
☒

Search

Hide Filters

Person/Account	Premise	ID Type	ID Nbr
Brazil,Mark - Home Phone: (650) 276-1234 (Main customer - Acct. 7881973462)	500 Guerrero St, San Francisco, CA, 94103	Social security number	*****1789
Brazil,Mark NBB (Main customer - Acct. 1202826196)	1520 Pine Street, San Francisco, CA, 94105	Social security number	*****3216
Brazil,Mark PP (Main customer - Acct. 1720589936)	8510, East Street, San Francisco, CA, 94105	Social security number	*****8358
Brazil,Mark S - Home Phone: (510) 576-0055 (Main customer - Acct. 3066882735)	389 Church Street, San Francisco, CA, 94111	Drivers license	CA-8929204

Dashboard



Waiting for opnd.utilities-cloud.oracleindustry.com...

Account Financial History

Account Financial History

Main

Account Financial History ⓘ

Search By

Arrears Date

Account ID

1720589936

🔍 Brazil,Mark PP, Residential, \$-40.00

Search

Hide Filters

	Arrears Date	Financial Transaction Type	Current Amount	Current Balance	Payoff Amount	Payoff Balance
1		Late payment charge	\$3.04	\$-38.48	\$3.04	\$-38.48
2	06-29-2020	Pay Segment	\$-40.00	\$-41.52	\$-40.00	\$-41.52
3	06-01-2020	Pay Segment	\$-103.17	\$-1.52	\$-103.17	\$-1.52
4	04-01-2020	Bill Segment	\$38.12	\$101.65	\$38.12	\$101.65
5	03-01-2020	Bill Segment	\$25.41	\$63.53	\$25.41	\$63.53
6	02-01-2020	Bill Segment	\$38.12	\$38.12	\$38.12	\$38.12

Billing History

SA Billing History

BookmarkPrevious ItemClearSaveRefresh

Main

Account ID

🔒 1720589936

Brazil,Mark PP, Residential, \$-40.00

SA Information

California / Electric Residential, ERES1, Pending Stop, 01-01-2020 - 07-01-2021, Single family - no seasonal factors, 1724013694

SA ID 🔒 1724013694 🔍

	Start Date	End Date	Days	Status	Current Amount	Payoff Amount	UOM	Billable Service Quantity	Average Daily Service Quantity
🔗	03-01-2020	04-01-2020	31	Frozen	\$38.12	\$38.12	Kilowatt-Hours	300.000000	9.68
🔗	02-01-2020	03-01-2020	29	Frozen	\$25.41	\$25.41	Kilowatt-Hours	200.000000	6.90
🔗	01-01-2020	02-01-2020	32	Frozen	\$38.12	\$38.12	Kilowatt-Hours	300.000000	9.38

Account-Credit and Collection

Account

Bookmark

Clear

Save

Refresh

Main

Auto Pay

Persons

Financial Balances

Bill Messages

C & C

Budget

Deposits

Characteristics

Alerts

Account Portal

Account

Brazil,Mark PP, Residential, \$-40.00

Account ID 1720589936 6

Collection Class

Residential

Postpone Credit Review Until

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

Admin Menu-Installation Options-Control Central Alerts

Installation Framework Options Control Central Alert Algorithms

PP-Active	Show Count of Active Pay Plans
PP-Broken	Show Count of Broken Pay Plans
PP-Kept	Show Count of Kept Pay Plans
CC-PPDENIAL	Count Pay Plan Denial Customer Contacts