

Oracle Utilities Customer Care and Billing Release 2.5.0

Utility Reference Model

3.3.2.3 Stop Premise Based Service

August 2016

Oracle Utilities Customer Care and Billing Release 2.5.0 Utility Reference Model 3.3.2.3 Stop Premise Based Service

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3.3.2.3 Stop Premise Based Service

This section provides a description of the Stop Premise Based Servicebusiness process, including:

- ♦ [Brief Description](#)
 - ♦ [Actors/Roles](#)
- ♦ [Business Process Diagrams](#)
 - ♦ [Stop Premise Based Service Process Model - Page 1](#)
 - ♦ [Stop Premise Based Service Process Model - Page 2](#)
- ♦ [Stop Premise Based Service Detailed Process Model Description](#)
- ♦ [Installation Options - Control Central Alert Algorithms](#)
- ♦ [Related Training](#)

Brief Description

Business Process: 3.3.2.3 CC&B v2.5 Stop Premise Based Service

Process Type: Sub-Process

Parent Process: 3.3.2 CC&B v2.5 Manage Service Agreement

Sibling Processes:

- 5.3.2 CC&B v2.5 Manage Fieldwork
- 3.3.3.1 CC&B v2.5 Refund Deposit
- 3.4.4.3a CC&B v2.5 Cancel Budget
- 3.4.4.3b CC&B v2.5 Expire Non-Billed Budget
- 4.2.2 CC&B v2.5 Manage Bill
- 4.3.1.1 CC&B v2.5 Manage Payments
- 3.4.1.1 CC&B v2.5 Manage Customer Contacts
- 4.3.2.1 CC&B v2.5 Manage Collection Process
- 4.3.2.2 CC&B v2.5 Manage Severance Process
- 3.3.2.1 CC&B v2.5 Start Premise Based Service
- 3.3.2.2 CC&B v2.5 Start Non-Premise Based Service
- 3.3.2.4 CC&B v2.5 Stop Non-Premise Based Service
- 3.3.6.3 CC&B v2.5 Stop Premise Based Service for Landlord-Tenant
- 5.3.2.1 CC&B v2.5 Manage Field Activities and Field Orders
- 4.1.1.1 CC&B v2.5 Manage Adjustment

This process describes the typical Stop Service processing. In the Stop Service process the relationship between the Service Provider and Customer is terminated. There is an effective end date and end read for the Service Agreement.

The request for Stop Service could be for:

- Start Service for a new or existing customer and a Stop Service are created automatically by the system. Refer to the Sibling Process 3.3.2.1 CC&B v2.5 Start Premise Based Service.
- Customer no longer receives service from the Service Provider.
- Customer has been cut for non-pay. Refer to 4.3.2.2 CC&B v2.5 Manage Severance Process for details.

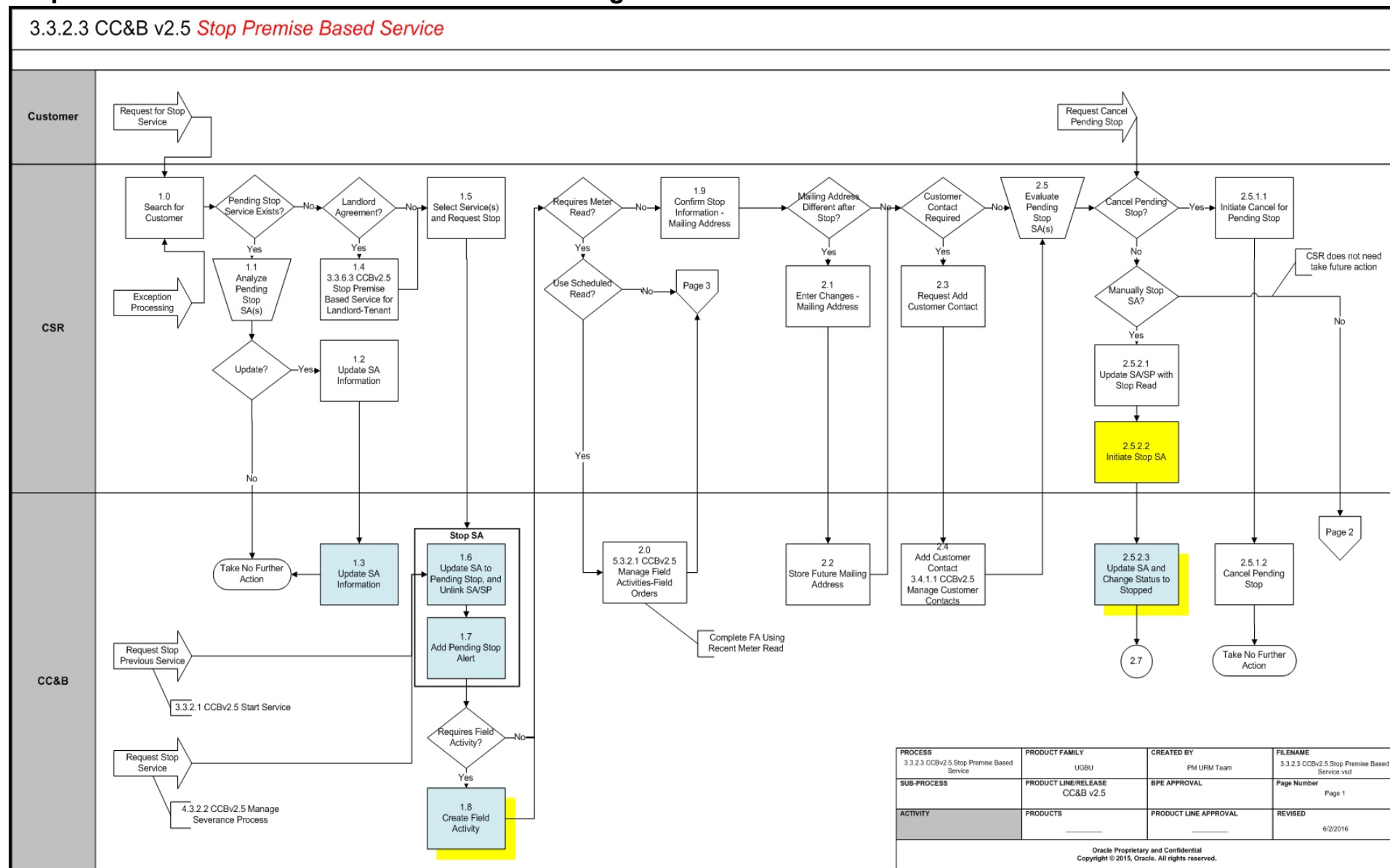
Actors/Roles

The Stop Premise Based Service business process involves the following actors and roles.

- **CC&B:** The Customer Care and Billing application. Steps performed by this actor/role are performed automatically by the application, without the need for user initiation or intervention.
- **CSR CC&B:** CSR or Authorized User of the Customer Care and Billing application.

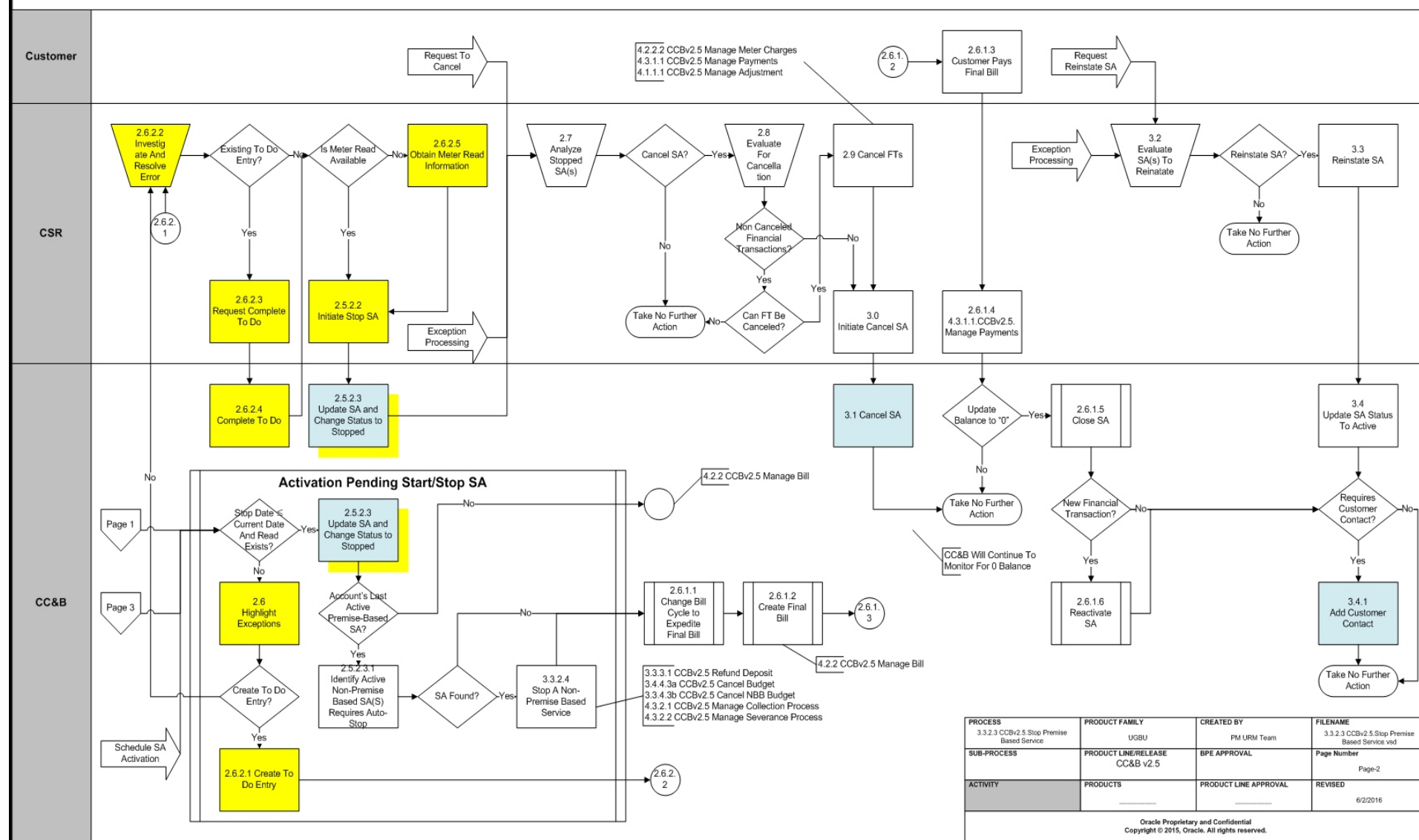
Business Process Diagrams

Stop Premise Based Service Process Model - Page 1



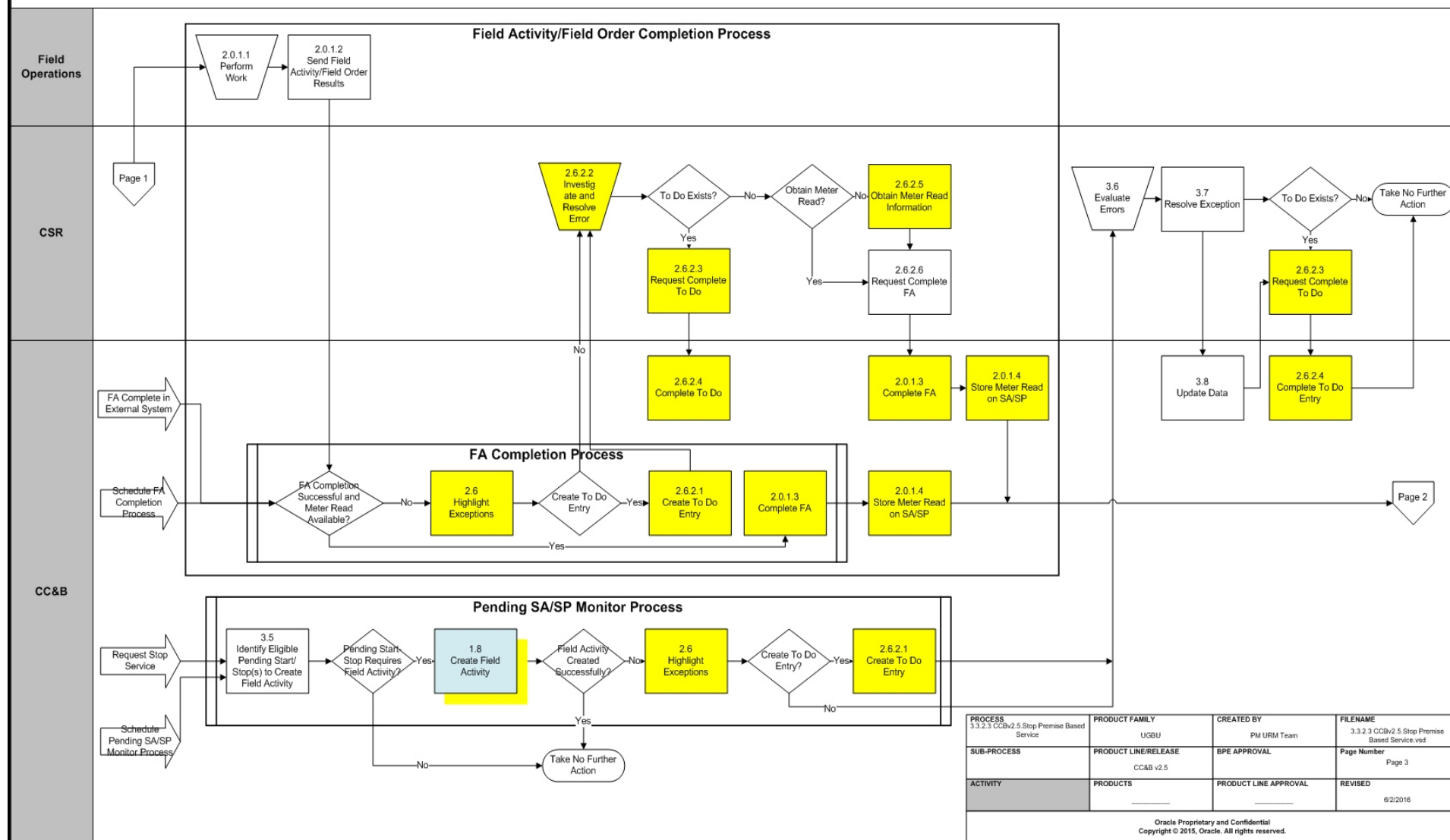
Stop Premise Based Service Process Model - Page 2

3.3.2.3 CC&B v2.5 *Stop Premise Based Service*



Stop Premise Based Service Process Model - Page 3

3.3.2.3 CC&B v2.5 *Stop Premise Based Service*



Stop Premise Based Service Detailed Process Model Description

This section provides a detailed description of the “Stop Premise Based Service” business process, including:

- ♦ 1.0 Search for Customer
- ♦ 1.1 Analyze Pending Stop SAs
- ♦ 1.2 Update SA Stop Information
- ♦ 1.3 Update SA Information
- ♦ 1.4 3.3.6.3 CC&B v2.5 Stop Premise Based Service for Landlord-Tenant
- ♦ 1.5 Select Services and Request Stop
- ♦ 1.6 Update SA to Pending Stop and Unlink SA/SP
- ♦ 1.7 Add Pending Stop Alert
- ♦ 1.8 Create Field Activity
- ♦ 1.9 Confirm Stop Information -Mailing Address
- ♦ 2.0 5.3.2.1 CC&B v2.5 Manage Field Activities and Field Orders
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- ♦ 2.5.2.1 Update SA/SP with Read
- ♦ 2.5.2.2 Initiate Stop SA
- ♦ 2.5.2.3 Update SA and Change Status to Stopped
- ♦ 2.5.2.3.1 Check for Active Non-Premise Based SAs with Auto-Stop Flag
- ♦ 2.6 Highlight Exceptions
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- ♦ 2.6.1.2 Create Final Bill
- ♦ 2.6.1.3 Customer Pays Final Bill
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- ♦ 2.6.1.6 Reactivate SA
- ♦ 2.6.2.1 Create To Do Entry
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- ♦ 2.8 Evaluate for Cancellation
- ♦ 2.9 Cancel FTs 4.2.2.2 CC&B v2.5 Manage Meter Charges, 4.3.1.1 CC&B v2.5 Manage Payments and 4.1.1.1 CC&B v2.5 Manage Adjustment
- ♦ 3.0 Initiate Cancel SA
- ♦ 3.1 Cancel SA
- ♦ 3.2 Evaluate SA to Reinstate
- ♦ 3.3 Reinstate SA
- ♦ 3.4 Update SA Status to Active
- ♦ 3.5 Identify Eligible Pending Start/Stops to Create Field Activity
- ♦ 3.6 Evaluate Errors
- ♦ 3.7 Resolve Exception
- ♦ 3.8 Update Data

1.0 Search for Customer

Reference: [Stop Premise Based Service Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: Upon receipt of request for Start Service, the CSR or Authorized User locates the customer in CC&B 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 for the customer including Pending Stops.

Entities to Configure

- Installation Options
- Zones
- Installation Options-Framework
- Identifier Type
- Geographic Type

Available Algorithms

- [Installation Options - Control Central Alert Algorithms](#)
- CI_PER-INFO - This person information algorithm display summary information (name, phone number) that appears adjacent to a person ID throughout the system.
- CI_ACCT-INFO - This algorithm formats the “Account Information” that appears throughout the system.
- CI_PHNFMT_NA - This phone type algorithm validate North American phone format.
- CI_PER-INFO - This person information algorithm display summary information (name, phone number) that appears adjacent to a person ID throughout the system.
- C1-GLBL-CTXT - This global context algorithm is responsible to complete missing global context values based on values of other context fields.

1.1 Analyze Pending Stop SAs

Reference: [Stop Premise Based Service Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User analyzes the existing Pending Stop Service Agreement to ensure all information is received from customer and confirms stop date.

1.2 Update SA Stop Information

Reference: [Stop Premise Based Service Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: A stop date or other Service Agreement information may need to be changed. The CSR or Authorized User enters the changes.

1.3 Update SA Information

Reference: [Stop Premise Based Service Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CC&B

Description: Any updates for the Service Agreement are made in CC&B.

Entities to Configure

- Installation Options
- SA Type

Available Algorithms

- CI_SAI-STD - This Installation algorithm formats the "SA Information" that appears throughout the system.
- CI_SAT-NRT, CI_SAT-NOBAL - This SA Type SA Information algorithms formats the "SA Information" that appears throughout the system.
- CI_LLREV - This initiate a stop for a SA algorithm causes service to be started under a landlord's account when a tenant stops service at a service point covered by a landlord agreement.
- C1-SAIS-ST - This SA Type initiate stop SA algorithm automatically stops a pending stop service agreement (instead of waiting for the background process that transitions SAs from pending stop to stopped).
- CI_SASPFWCRE - This algorithm type causes field activities to be created for pending start and pending stop service agreements shortly before the pending start / stop date IF FIELD ACTIVITIES DO NOT ALREADY EXIST.
- CI_SASP-INMR - This algorithm creates a start or stop meter read and updates the SA/SP with the meter read if the SA/SP is associated with an interval meter.

Business Objects

- C1-AccountManagementSA - Service Agreement - Account Management
- WX-ServiceAgreement - This business object is used to read an instance of a service agreement.
- CI_SAIInfo - SA Information
- CI_DepositSAAmount - Maintain Deposit SA Amount
- C1-SAServiceTaskDetails - SA Service Task Details BO
- C1-MDM1SA (CC&B - MDM Integration) - SA Information for MDM1 SA Sync
- C1-MDM2SA (CC&B - MDM Integration) - MDM2 SA
- C1-NMSSA (CC&B - NMS Integration) - SA Information for NMS Sync
- C1-NextScheduleReadDate - MDM Next Read Schedule Read Date. This business object is used to read, add, and update an SA characteristic that holds the next read schedule date.
- C1-PPBSA - This business object is used to retrieve details for a prepaid biller's (PPB) service agreement.
- C1-SABasic - Service Agreement Basic
- C1-SAContractDetails - Service Agreement Contract Details
- C1-SARelationship - SA Relationship BO
- C1-SARelTypePhysicalBO - Physical BO for SA Relationship Type
- C1-SATypeStartOptionPhysicalBO - Physical BO for SA Type Start Option
- C1-SATypeBasic - SA Type Basic
- WX-SAType - Service Agreement Type
- CI_SAType - SA Type Basic
- CI_SATypeStartOptionRequired - SA Type Start Option Required

- C1-SATypePhysicalBO - Physical BO for SA Type
- C1-SATypeSARelTypePhysicalBO - Physical BO for SA Type SA Relationship Type
- C1-ServiceRequestIntegration - This business object captures additional configuration required by the service request integration.
- C1-ServiceRequestFieldActivity - Service Request Field Activity
- C1-FASyncRequest - FA Sync Request

1.4 3.3.6.3 CC&B v2.5 Stop Premise Based Service for Landlord-Tenant

Reference: [Stop Premise Based Service Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: Refer to 3.3.6.3 CC&B v2.5 Stop Premise Based Service for Landlord-Tenant.

1.5 Select Services and Request Stop

Reference: [Stop Premise Based Service Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User selects Service Agreements to stop. The CSR or Authorized User is presented with the following choices:

- Stop Selected SA's - To Stop selected Service Agreements linked to the Account
- Stop a Premise - To Stop All Services at the Premise (Address)
- Stop a SA - To Stop a specific SA
- Stop all Active SA's - To Stop All service agreements linked to the Account

1.6 Update SA to Pending Stop and Unlink SA/SP

Reference: [Stop Premise Based Service Process Model - Page 1 on page 3](#) for the associated business process diagram.

Group: Stop SA

Actor/Role: CC&B

Description: The status of the Service Agreement changes to Pending Stop. The SA/SP link is populated with an effective end date (stop) date. A Field Activity may be created if configured. CC&B links the Field Activity to the SA/SP.

Entities to Configure

- Installation Options

Available Algorithms

- CI_SAI-STD - This Installation algorithm formats the "SA Information" that appears throughout the system.
- CI_SAT-NRT, CI_SAT-NOBAL - This SA Type SA Information algorithm formats the "SA Information" that appears throughout the system.
- CI_LLREV - This initiate a stop for a SA algorithm causes service to be started under a landlord's account when a tenant stops service at a service point covered by a landlord agreement.
- C1-SAIS-ST - This SA Type initiate stop SA algorithm automatically stops a pending stop service agreement (instead of waiting for the background process that transitions SAs from pending stop to stopped).

1.7 Add Pending Stop Alert

Reference: [Stop Premise Based Service Process Model - Page 1 on page 3](#) for the associated business process diagram.

Group: Add Pending Stop Alert

Actor/Role: CC&B

Description: CC&B creates a Dashboard Alert for the Pending Stop Service Agreement.

Entities to Configure

- Installation Options

Available Algorithms

- [Installation Options - Control Central Alert Algorithms](#)

1.8 Create Field Activity

Reference: [Stop Premise Based Service Process Model - Page 1 on page 3](#) for the associated business process diagram.

Group: Pending SA/SP Monitor Process

Actor/Role: CC&B

Description: A stop Field Activity may be created if configured and is required. CC&B links the Stop Field Activity to the SA/SP. The Pending SA/SP Monitor Process also creates Field Activities for Pending Starts and Stops if the Field Activity is not already created and is required.

- **Manual Process:** A Field Activity may be created when the CSR or Authorized User initiates the Stop Service.
- **Automated Process:** A Field Activity may be created when the Pending SA/SP Monitor Process is executed.

Process Names

- Pending SA/SP Monitor - PSASPM - Creates field activities shortly before the start/stop date if field activities have not already been created.

Entities to Configure

- To Do Type
- To Do Role
- SA Type
- FA Type
- FA Type Profile

Available Algorithms

- CI_SASPFWCRE - This algorithm type causes field activities to be created for pending start and pending stop service agreements shortly before the pending start / stop date IF FIELD ACTIVITIES DO NOT ALREADY EXIST.
- CI_SASP-INMR - This algorithm creates a start or stop meter read and updates the SA/SP with the meter read if the SA/SP is associated with an interval meter.

1.9 Confirm Stop Information -Mailing Address

Reference: [Stop Premise Based Service Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User confirms the mailing address for the final bill or if the address is changing for future bills for remaining active service agreements.

2.0 5.3.2.1 CC&B v2.5 Manage Field Activities and Field Orders

Reference: [Stop Premise Based Service Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR - CC&B

Description: If fieldwork is required, a Field Activity is created. The Field Activity Type is configured based on specific profiles. Each Field Activity eligible for dispatch will have a specific Dispatch Group defined for every Service Point Type and Operations Area. The SA type SA/SP Fieldwork Creation algorithm determines if a Field Activity is necessary. The background process, Pending SA/SP Monitor, creates Field Activities for Pending Start and Stop Agreements shortly before the start/stop date if Field Activities have not already been created. Once the Field Activity is completed the start read is made available in CC&B. The background process, Service Agreement Activation, uses this Field Activity information to determine if the Pending Service Agreement can be activated. Refer to 5.3.2.1 CC&B v2.5 Manage Field Activities and Field Orders.

Process Names

- Pending SA/SP Monitor - PSASPM - Creates field activities shortly before the start/stop date if field activities have not already been created.
- FANRMRCO - The complete field activity using a recent read process looks for pending start / stop field activities for a meter read recently. It prorates the read into an end read and starts read for the start and stop SA's.
- FA Completion - FACOMPL - The field activity completion process completes field activities and field orders using the records in the various field activity staging tables.
- SASP - The find read for SA/SP process updates SA/SP records of active service agreements with the appropriate start or stop read.

Entities to Configure

- FA Types
- FA Type Profiles
- Operations Area
- Dispatch Group
- Field Service Class
- Field Service Control
- FA Remark

Business Objects

- C1-ServiceRequestIntegration - This business object is used as a parent service task type BO for service request related task type BOs.
- C1-NotifyAppointmentTaskType - This business object is used to capture the To Do Type and optional Role to use for appointment notification.
- C1-NotifyMissedApptTaskType - This business object is used to capture the Adjustment Type to use for missed appointment compensation.
- C1-CreateCustContactTaskType - Service Task Type BO for Customer Contact Notification.
- C1-ServiceRequestTask - This parent business object defines the behavior of certain service requests.
- C1-NotifyAppointmentTask - This business object defines the behavior of an appointment notification update request in the service request integration.
- C1-NotifyMissedAppointmentTask - This business object defines the behavior of a missed appointment notification update request in the service request integration.
- C1-CreateCustomerContactTask - This business object defines the behavior of a customer contact creation update request in the service request integration.

2.0.1.1 Perform Work

Reference: [Stop Premise Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

Group: Field Activity /Field Order Completion Process

Actor/Role: Field Operations

Description: A technician is routed to the field to obtain read, and/or connect, or other tasks. This represents a combined set of processes that includes dispatching, performing the work, recording of a read or other activity at the site, and uploading results.

2.0.1.2 Send Field Activity/Field Order Results

Reference: [Stop Premise Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

Group: Field Activity /Field Order Completion Process

Actor/Role: Field Operations

Description: The Field Operations office communicates and returns the Field Activity/Field Order results. Refer to 5.3.2.1 CC&B v2.5 Manage Field Activities and Field Orders, 4.2.1.1a CC&B v2.5 Read Meters and 4.2.1.2a CC&B v2.5 Load Meter Reads.

Process Names

- Process for Populating MR Upload Staging and FA Upload Staging are custom. MUP1 and MUP2 reference the background processes for populating the meter configuration and creating the meter read.

2.0.1.3 Complete FA

Reference: [Stop Premise Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

Group:

- Field Activity Completion
- Field Activity /Field Order Completion Process

Actor/Role: CSR

Description: If fieldwork is required, a Field Activity is created. The Field Activity Type is configured based on specific profiles. Each Field Activity eligible for dispatch will have a specific Dispatch Group defined for every Service Point Type and Operations Area. The SA type SA/SP Fieldwork Creation algorithm determines if a Field Activity is necessary. The background process, Pending SA/SP Monitor, creates Field Activities for Pending Start and Stop Agreements shortly before the start/stop date if Field Activities have not already been created. Once the Field Activity is completed the start read is made available in CC&B. The background process, Service Agreement Activation, uses this Field Activity information to determine if the Pending Service Agreement can be activated. Refer to 5.3.2.1 CC&B v2.5 Manage Field Activities and Field Orders.

Process Names

- Pending SA/SP Monitor - PSASPM - Creates field activities shortly before the start/stop date if field activities have not already been created.
- FANRMRCO - The complete field activity using a recent read process looks for pending start / stop field activities for a meter read recently. It prorates the read into an end read and starts read for the start and stop SA's.
- FA Completion - FACOMPL - The field activity completion process completes field activities and field orders using the records in the various field activity staging tables.

- SASP - The find read for SA/SP process updates SA/SP records of active service agreements with the appropriate start or stop read.

Entities to Configure

- FA Types
- FA Type Profiles
- Operations Area
- Dispatch Group
- Field Service Class
- Field Service Control

Available Algorithms

- CI_SASPFWCRE - This algorithm creates field activities to be created for pending start and pending stop service agreements shortly before the pending start / stop date if field activities do not already exist.
- C1-FAIN-INFO- Installation algorithm Field Activity Information
- C1-FAAD-INFO - Installation algorithm Field Activity Additional Information
- C1-DGRP-DFLT - FA Type Dispatch Group Criteria - Get the default dispatch group from FS control
- CI_FACCHARGE - Field Activity Completion - this algorithm applies charges by creating an adjustment.
- CI_FA-SVCCHG, CI_FA-INSCHG - These algorithms levies a flat charge.
- CI_CREFACSE - This algorithm type creates a new object when a field activity is completed.

2.0.1.4 Store Meter Read on SA/SP Link

Reference: [Stop Premise Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

Group: Field Activity /Field Order Completion Process

Actor/Role: CC&B

Description: The meter read associated with the stop Service Agreement is stored in CC&B and available for the Background Process, Service Agreement Activation to stop the Service Agreement.

Customizable Processes

- SAACT - SA Activation. The service agreement activation process updates pending start and pending stop service agreements.

2.0.1.5 Request Complete FA

Reference: [Stop Premise Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

Group: Field Activity /Field Order Completion Process

Actor/Role: CSR

Description: The CSR or Authorized User manually completes the Field Activity using the Meter Read information.

2.1 Enter Changes - Mailing Address

Reference: [Stop Premise Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User enters new information including a forwarding address. The system defaults to mailing premise. The CSR may change the default. CC&B address sources include Person, Premise, and Account. The address information is effective when the Service Agreement is stopped.

Entities to Configure

- Postal Code Default
- Installation Options
- Bill Route Type
- Country

2.2 Store Future Mailing Address

Reference: [Stop Premise Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: The new mailing address is stored in CC&B and is updated when the Service Agreement is stopped.

2.3 Request Add Customer Contact

Reference: [Stop Premise Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CSR

Description: Based on established business rules the CSR or Authorized User creates a Customer Contact for the customer, recording pertinent information about the changes for the Service Agreement.

Entities to Configure

- Customer Contact Class
- Customer Contact Type

2.4 Add Customer Contact

Reference: [Stop Premise Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: The Customer Contact information is added in CC&B.

Entities to Configure

- Customer Contact Class
- Customer Contact Type

2.5 Evaluate Pending Stop SAs

Reference: [Stop Premise Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User reviews the pending stop Service Agreement. The customer may call to indicate they are not moving from the given premise. It is determined to cancel the Pending Stop.

2.5.1.1 Initiate Cancel for Pending Stop

Reference: [Stop Premise Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User cancels the Pending Stop Service Agreement.

2.5.1.2 Cancel Pending Stop

Reference: [Stop Premise Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: The CSR or Authorized User cancels the Pending Stop Service Agreement.

2.5.2.1 Update SA/SP with Read

Reference: [Stop Premise Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User confirms the stop date and updates the Service Agreement/Service Point Link with an associated Meter Read for the effective stop date.

2.5.2.2 Initiate Stop SA

Reference: [Stop Premise Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User manually stops the Service Agreement in CC&B.

2.5.2.3 Update SA and Change Status to Stopped

Reference: [Stop Premise Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: When all necessary information is available, CC&B transitions the Service Agreement to stopped.

- **Manual Process:** The CSR or Authorized User may transition the Service Agreement to Stopped as a result of exception processing.
- **Automated Process:** CC&B will automatically transition the Service Agreement to Stopped status when all required information is made available.

Entities to Configure

- SA Type

Available Algorithms

- CI_LLREV-C - This algorithm causes service to be started under a landlord's account at a service point covered by a landlord agreement.
- CI_NB-SAST- This SA Type Stop Algorithm executes additional logic that should be executed when a non-billed budget SA is stopped.
- CI_REFMFEE - This SA Type Stop algorithm refunds a service credit membership fee.

Process Names

- SAACT - SA Activation - The service agreement activation process updates pending start and pending stop service agreements.

2.5.2.3.1 Check for Active Non-Premise Based SAs with Auto-Stop Flag

Reference: [Stop Premise Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: If the SA is the account's last active premise-based service, CC&B proceeds to stop account's remaining active non-premise based services configured with auto-stop indicator. Refer to 3.3.2.4 Stop Non-Premise Based Service.doc.

Entities to Configure

- SA Type

Process Names

- SAACT - SA Activation - The service agreement activation process updates pending start and pending stop service agreements.

2.6 Highlight Exceptions

Reference: [Stop Premise Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Group:

- Service Agreement Activation Process
- FA Completion Process
- Pending SA/SP Monitor Process

Actor/Role: CC&B

Description: The CC&B background process, Service Agreement Activation, periodically verifies whether or not Service Agreements can be activated. CC&B creates an exception processing record for each service agreement with the Service Agreement's effective start date less than the current business date and with missing or incomplete information.

Entities to Configure

- To Do Type
- To Do Role

Process Names

- TD-FAUPL - This background process creates a To Do entry for every field activity upload staging record that's in error.
- TD-XAIUP - This background process creates a To Do entry for every XAI upload staging in error.
- SAACT - SA Activation - Activates and stops Service Agreements when all required information is available.

- TD-SSFTL - To Do for Old Pending Start/Stops-catches start/stop requests that have gone unfulfilled.
- PSASPM - Pending SA/SP Monitor - Creates field activities shortly before the start/stop date if field activities have not already been created.

2.6.1.1 Change Bill Cycle to Expedite Final Bill

Reference: [Stop Premise Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: CC&B changes the bill cycle when the last service agreement for the account is stopped to allow for final bill creation.

2.6.1.2 Create Final Bill

Reference: [Stop Premise Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: The Batch Billing process creates the final bill for the Customer.

2.6.1.3 Customer Pays Final Bill

Reference: [Stop Premise Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: Customer

Description: The Customer receives and pays the final bill.

2.6.1.4 4.3.1.1 CC&B v2.5 Manage Payments

Reference: [Stop Premise Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User enters the payment in CC&B. Refer to 4.3.1.1 CC&B v2.5 Manage Payments.

2.6.1.5 Close SA

Reference: [Stop Premise Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: The Service Agreement is automatically transitioned to Closed Status when the balance is "0".

2.6.1.6 Reactivate SA

Reference: [Stop Premise Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: The system moves the Service Agreement to Reactivated status if a Financial Transaction is created after a Service Agreement is closed. When the financial balance returns to "0", the Service Agreement is closed again.

2.6.2.1 Create To Do Entry

Reference: [Stop Premise Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Group:

- Service Agreement Activation Process
- Field Activity /Field Order Completion Process
- Pending SA/SP Monitor Process

Actor/Role: CC&B

Description: If configured, this background process creates To Do Entries for exception processing. The exception is also available for viewing and resolution on a separate page in CC&B.

Entities to Configure

- To Do Types
- To Do Roles

Process Names

- TD-FAUPL - Creates a To Do entry for every field activity upload staging record that's in error.
- TD-XAIUP - Creates a To Do entry for every XAI upload staging in error.
- SAACT - SA Activation - Activates and stops Service Agreements when all required information is available.
- TD-SSFIL - To Do for Old Pending Start/Stops-catches start/stop requests that have gone unfulfilled.
- Pending SA/SP Monitor - PSASPM - Creates field activities shortly before the start/stop date if field activities have not already been created.

2.6.2.2 Investigate and Resolve Error

Reference: [Stop Premise Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Group: Field Activity /Field Order Completion Process

Actor/Role: CSR

Description: Based on established business rules the CSR or Authorized User investigates possible solutions or workarounds for missing or incomplete information.

2.6.2.3 Request Complete To Do

Reference: [Stop Premise Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Group: Field Activity /Field Order Completion Process

Actor/Role: CSR

Description: If the background process creates a To Do Entry, the CSR or Authorized User marks the To Do Entry as complete and requests completion of the To Do Entry once the error is resolved. The CSR or Authorized User may add comments or a log entry for future reference.

Entities to Configure

- To Do Types
- To Do Roles

2.6.2.4 Complete To Do Entry

Reference: [Stop Premise Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Group: Field Activity /Field Order Completion Process

Actor/Role: CC&B

Description: The To Do Entry is updated to Complete status in CC&B.

Entities to Configure

- To Do Types
- To Do Roles

2.6.2.5 Obtain Meter Read Information

Reference: [Stop Premise Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Group: Field Activity /Field Order Completion Process

Actor/Role: CSR

Description: The read may not be readily available. The CSR or Authorized User manually enters available information in CC&B. This may require creation of a new Field Activity, estimated read, or further investigation to provide necessary read information.

2.7 Analyze Stopped SA

Reference: [Stop Premise Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User may review the Stopped Service Agreement. Information made available requires further evaluation. The Service Agreement may need to be canceled.

2.8 Evaluate for Cancellation

Reference: [Stop Premise Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CSR

Description: As part of the cancellation process it is determined there are Financial Transactions associated with the Service Agreement.

2.9 Cancel FTs 4.2.2.2 CC&B v2.5 Manage Meter Charges, 4.3.1.1 CC&B v2.5 Manage Payments and 4.1.1.1 CC&B v2.5 Manage Adjustment

Reference: [Stop Premise Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CSR

Description: Subject to established business rules, the CSR or Authorized User cancels the existing Financial Transactions. An applicable Cancel Reason is selected. Refer to 4.2.2.2 CC&B v2.5 Manage Meter Charges, 4.3.1.1 CC&B v2.5 Manage Payments. And 4.1.1.1 CC&B v2.5 Manage Adjustment.

Entities to Configure

- Cancel Reason - For Bill, Payment or Adjustment

3.0 Initiate Cancel SA

Reference: [Stop Premise Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User changes the Service Agreement status to Canceled.

3.1 Cancel SA

Reference: [Stop Premise Based Service Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: The Service Agreement is transitioned to a canceled status. Canceled is a final status.

Entities to Configure

- To Do Type
- To Do Role

Available Algorithms

- CL_SACA-CRTD - Create To Do Entry when SA Canceled

3.2 Evaluate SA to Reinstate

Reference: [Stop Premise Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User reviews and gathers available information to reinstate SA.

3.3 Reinstate SA

Reference: [Stop Premise Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User initiates the Reinstate SA function.

3.4 Update SA Status to Active

Reference: [Stop Premise Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CC&B

Description: The Reinstate action in CC&B changes the status of the Service Agreement to Active. The Reinstate action can be used to reinstate a closed, reactivated, or stopped Service Agreement.

3.5 Identify Eligible Pending Start/Stops to Create Field Activity

Reference: [Stop Premise Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

Group: Pending SA/SP Monitor Process

Actor/Role: CC&B

Description: The Pending SA/SP Monitor Process selects and creates Field Activities for Pending Starts and Stops if the Field Activity is not already created and is required.

Process Names

- Pending SA/SP Monitor - PSASPM - Creates field activities shortly before the start/stop date if field activities have not already been created.

3.6 Evaluate Errors

Reference: [Stop Premise Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CSR

Description: Based on established Business Rules the CSR or Authorized User investigates possible solutions or workarounds for missing or incomplete information.

3.7 Resolve Exception

Reference: [Stop Premise Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User enters required information to resolve the exception in CC&B. This may include creating a Field Activity, or updating a Meter record, Service Point record, or SP Meter/Item History records.

3.8 Update Data

Reference: [Stop Premise Based Service Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: CC&B

Description: Any resolution or change information is updated in CC&B.

Installation Options - Control Central Alert Algorithms

The following installation options are available:

Value	Description
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
CCAL-WF	Display Account or Premise linked to Active Workflow Process
C1_CCAL-TD	Highlight Outstanding To Do Entries
CI_CCAL_DECL	Highlight Effective Declarations for Account and Premise
C1-CCAL-CASE	Highlight Open Cases
CCAL-FAERMSG	Highlight FA's with outstanding outgoing messages
CI_WO_BILL	Highlight Written off Bills
CI_OD-PROC	Highlight Active Overdue Processes
CI_OPN_MEVT	Highlight Open and Disputed Match Event
CI_STOPSA	Highlight Stopped SA's
C1-CCAL-CLM	Highlight Open Rebate Claims
C1_COLL-DF	Highlight Active Collection Processes
C1_COLLRF-DF	Highlight Active Collection Agency Referral
C1_PENDST-DF	Highlight Pending Start Service Agreements
C1_CASH-DF	Cash Only Account
C1_CRRT-DF	Credit Rating Alert
C1_LSSL-DF	Highlight Life Support/Sensitive Load on Person
C1_LSSLPR-DF	Highlight Life Support/Sensitive Load on Premise
C1_SEVPR-DF	Highlight Active Severance Processes
C1-CCAL-OCBG	Highlight Open Off Cycle Bill Generators
F1-SYNRQALRT	Retrieve Outstanding Sync Request
C1-PPBALERT	Prepaid Biller Task Alert
C1-OPENLDALR	Retrieve Open Leads
C1-STASKALRT	Retrieve Open Service Tasks
C1-PPBALERT	Prepay Biller Task Alert

Related Training

The following User Productivity Kit (UPK) modules provide training related to this business process:

- Oracle Utilities UPK for Customer Care and Billing, Administrative Setup
- Oracle Utilities UPK for Customer Care and Billing, User Tasks
- Oracle Utilities UPK for Customer Care and Billing, Credit and Collections
- Oracle Utilities UPK for Customer Care and Billing, Rating and Billing
- Oracle Utilities UPK for Customer Care and Billing, Rating and Billing for Interval Data