**CCS**

**24B**

**3.4.4.2b** **Renew Non-Billed Budget**

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Contents

Brief Description 4

Business Process Model 5

Detail Business Process Model Description 6

Test Assets related to the Current Process 11

Document Control 12

Attachments: 13

Account/Non-Billed Budget 13

Admin Menu/Non Billed Budget Recommendation Rule 15

Admin Menu/Installation Options 16

Customer Contact Created After Renewal 16

## Brief Description

**Business Process: 3.4.4.2b CCS.Renew Non-Billed Budget**

**Process Type: Sub Process**

**Parent Process: 3.4.4 CCS.Manage Budget**

Sibling Processes: 4.3.1 CCS.Perform Settlement Activities, 4.1.1.4 CCS.Develop Arrears Procedures, 4.2.2 CCS.Manage Bill, 3.4.1 CCS.Manage Contacts, 3.3.2.2 CCS.Start Non-Premise Based Service, 3.3.2.4 CCS.Stop Non-Premise Based Service

This process describes the activities associated with updating as well as renewal for a [Non Billed Budget](#AccountNBB).

A Non-Billed Budget can be renewed either manually or via a background process. When the Non-Billed Budget SA is created, the expiration date, renewal date and the [Recommendation Rule](#NBBRecommendationRule) used to create the initial budget are kept with the SA. A renewal flag on the Non-Billed Budget SA type controls if a renewal is required, optional or not allowed. The renewal date is defaulted on to an SA based on the valued of the Days Before Expiration for Renewal field on the SA type.

An algorithm on the SA type can customize the processing required to renew an SA.

A user can manually launch the renewal process by clicking Renew on the Non-Billed Budget maintenance page.

## Business Process Model



## Detail Business Process Model Description

[**1.1**](#BusinessProcessModel) **Search for Customer**

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

**Description:**

Upon receipt of request for renewal or inquiry for [Non Billed Budget](#AccountNBB) Billing the CSR or Authorized User accesses [Control Central Search](#CCSearch) to locate the customer in CCS(CCB). There are a number of algorithms that can be stored on Installation Options for [Control Central Alerts](#AdminMenuInstallationOptions). These algorithms provide the CSR or Authorized User with valuable insight for overall analysis of the customer.

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

|  |
| --- |
| [Installation Options – Control Central Alerts](#AdminMenuInstallationOptions) |

[**1.2**](#BusinessProcessModel) **Review Customer/Account Eligibility/Renewal**

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

**Description:**

There is dialogue with Customer. The CSR or Authorized User evaluates the account. Account Financial History, Premise and Service Agreement Billing History, Credit Rating, and Credit and Collection History may be reviewed. Control Central Alerts assist the CSR or Authorized User in determining continued eligibility based on established business rules for [Non Billed Budget](#AccountNBB).

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

|  |
| --- |
| [Installation Options – Control Central Alerts](#AdminMenuInstallationOptions) |

[**1.3**](#BusinessProcessModel)  **3.4.1.1 Manage Customer Contacts**

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

**Description:**

Associated with established Business Rules the CSR or Authorized User enters necessary information about the Non Billed Budget Plan for the Customer. Refer to 3.4.1.1. Manage Customer Contacts

**Configuration required Y Entities to Configure:**

|  |
| --- |
| Customer Contact Class, Customer Contact Type |

[**1.4**](#BusinessProcessModel) **Review – Verify Non Billed Budget Information**

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

**Description:**

The CSR or Authorized User has dialogue with the customer and reviews the past [Non Billed Budget](#AccountNBB) information. The account may have more than one Non-Billed Budget SA.

[**1.5**](#BusinessProcessModel) **Determine Covered Service Agreements**

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

**Description:**

All SA’s configured as eligible for Non Billed Budget will be listed. The CSR or Authorized User confirms the Service Agreements to be considered for Non Billed Budget.

[**1.6**](#BusinessProcessModel) **Request Renewal**

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

**Description:**

The CSR or Authorized User requests renewal of the [Non-Billed Budget](#AccountNBB).

[**1.7**](#BusinessProcessModel) **Calculate Payments Group: Automated Non Billed Budget Renewal Process**

**Group: Non-billed Budget SA Renewal**

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

**Description:**

The SA renewal algorithm for the Non-Billed Budget SA type is called and determines the current [Recommendation Rule](#NBBRecommendationRule) and executes the associated payment schedule algorithm. The CCS(CCB) base package only handles service-point related SA’s.

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

|  |
| --- |
| SARN-NB - Determines the current [Recommendation Rule](#NBBRecommendationRule) for a Non-Billed Budget SA and executes the associated payment schedule algorithm to generate a new schedule. NBDA-DA – this algorithm type calculates the Average Daily Amount. |

**Configuration required Y Entities to Configure:**

|  |
| --- |
| Associated Algorithm, Recommendation Rule, SA Type for Non Billed Budget, and define SA’s eligible for NBB |

**Business Object Y Business Object:**

|  |
| --- |
| C1-NBBRulePhysicalBO- Physical BO for Non-billed Budget Rule |

[**1.8**](#BusinessProcessModel) **Set Payment Schedule/Update NBB with Specific Defined Rules Group: Automated Non-Billed Budget Renewal Process**

**Group: Non-billed Budget SA Renewal**

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

Description:

The [Recommendation Rule](#NBBRecommendationRule) establishes the amount to be paid and payment due dates. Rounding Rule, Rounding Unit, Day of Month, # of Payments, True Up Rule for outstanding balances are included as parameters of the recommendation rule. The Non-Billed Budget Payment Schedule algorithm generates a recommended payment schedule for a Non-Billed Budget. The expiration and renewal dates are also calculated.

**Customizable process N Process Name:**

|  |
| --- |
| SARENEW - The service agreement renewal process renews all active SAs that are due for renewal (i.e. where the renewal date is populated and is less than or equal to the process date). |

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

|  |
| --- |
| SARN-NB - Determines the current [recommendation rule](#NBBRecommendationRule) for a Non-Billed Budget SA and executes the associated payment schedule algorithm to generate a new schedule. NBPS-MON or NBPS-PS - algorithm type is used to generate payment schedule and to establish other specific defined parameters. |

**Configuration required Y Entities to Configure:**

|  |
| --- |
| Associated Algorithm, Recommendation Rule, SA Type for [Non Billed Budget](#AccountNBB), and define SA’s eligible for NBB |
| To do Type TD-SARN SA renewal error – Created when the batch process SARENEW has an error |

[**1.9**](#BusinessProcessModel) **Update Existing NBB with New Effective Period Group: Automated Non-Billed Budget Renewal Process**

**Group: Non-billed Budget SA Renewal**

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

**Description:**

If the Non-Billed Budget is configured for renewal, it is updated with a new effective renewal and expiration dates.

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

|  |
| --- |
| NBPS-MON or NBPS-PS algorithm - The new schedule is appended to the Non-Billed Budget SA and the renewal and expiration dates are updated accordingly. |

**Configuration required Y Entities to Configure:**

|  |
| --- |
| Associated Algorithm, [Recommendation Rule](#NBBRecommendationRule), SA Type for Non Billed Budget, and define SA’s eligible for NBB |

[**2.0**](#BusinessProcessModel) **Create Customer Contact Group: Automated Non-Billed Budget Renewal Process**

**Group: Non-billed Budget SA Renewal**

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

**Description:**

If configured, a customer contact will be created automatically.

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

|  |
| --- |
| SARN-NB – in addition to described above this algorithm. If a Customer Contact Class and Customer Contact Type are specified, a customer contact is created and linked to the main person associated with the account. |

**Configuration required Y Entities to Configure:**

|  |
| --- |
| Customer Contact Class and Type |

[**2.1**](#BusinessProcessModel) **Request to Update Non-Billed Budget Information**

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

**Description:**

Based on established Business Rules the CSR or Authorized User may override the payment schedule amounts or number of payments. The payment schedule may require updating based on a change to the start date or an expected up-front payment from the customer. Based on established Business Rules the CSR or Authorized User may change the expiration date or renewal date.

[**2.2**](#BusinessProcessModel) **Update Non-Billed Budget Information**

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

**Description:**

The [Non-Billed Budget](#AccountNBB) information is then updated in CCS(CCB).

[**2.3**](#BusinessProcessModel)  **4.3.1.1c Process Non-Billed Unmonitored Budget Payments**

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

**Description:**

Based on established business rules the CSR or Authorized User will gather autopay information from the customer and enter this information at the Account level.

[**2.4**](#BusinessProcessModel)  **Update Account Autopay Information**

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

**Description:**

Autopay information is updated in CCS(CCB).

[**2.5**](#BusinessProcessModel)  **Update Non-Billed Budget Autopay Information**

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

**Description:**

The CSR or Authorized User chooses the option to allow autopay for the Non-Billed Budget.

[**2.6**](#BusinessProcessModel) **Update Non-Billed Budget Autopay Information**

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

**Description:**

The [Non-Billed Budget](#AccountNBB) auto-pay information is updated in CCS(CCB).

[**2.7**](#BusinessProcessModel) **Create Letter for Non-Billed Budget Renewal**

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

**Description:**

If configured, CCS(CCB) will create a letter to be sent to the customer. A letter template is identified and associated with the Customer Contact Type.

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

|  |
| --- |
| Various algorithms – two algorithm types included in base package are LTEXGEN – Generic Letter Extract, C1-LTREX-RPT – Create letter using reporting engine |

**Customizable process N Process Name:**

|  |
| --- |
| LTRPRT – Letter Extract - The customer contact letter download process creates the flat file(s) that are interfaced to your letter print software to print letters associated with letter-oriented customer contacts. This process extracts all customer contact records associated with its batch control ID that are marked with a supplied run number. If a run number is not supplied, the process uses all customer contact records associated with its batch control ID that are marked with the current run number. |

**Configuration required Y Entities to Configure:**

|  |
| --- |
| Letter Template and Template defined on associated Customer Contact Type |

[**2.8**](#BusinessProcessModel) **Evaluate Eligibility for Renewal Group: Automated Non-Billed Budget Renewal Process**

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

**Description:**

CCS(CCB) will review the Account’s [Non-Billed Budget](#AccountNBB) Information and determine if the Active Non-Billed Budget is eligible for renewal.

**Customizable process N Process Name:**

|  |
| --- |
| SARENEW - The service agreement renewal process renews all active SAs that are due for renewal (i.e. where the renewal date is populated and is less than or equal to the process date). |

## Test Assets related to the Current Process

| Testing Asset Sr.No | Use Case | No Of Data sets |
| --- | --- | --- |
|  |  |  |
| 1 | URM-CCS-3442b-001-Renew-Non-Billed-Budget-SA | 3 |
| 2 | URM-CCS-3442b-002-Renew-Non-Billed-Budget-SA-Via-Batch-Process | 3 |

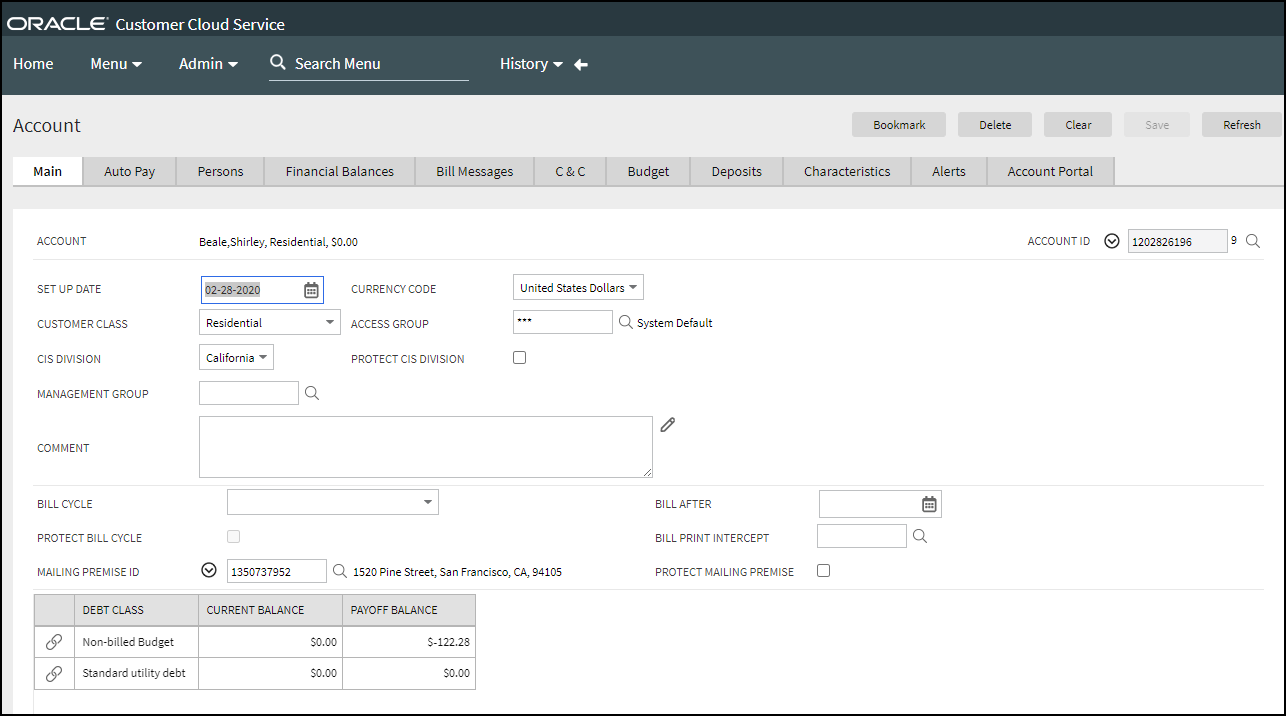
## Document Control

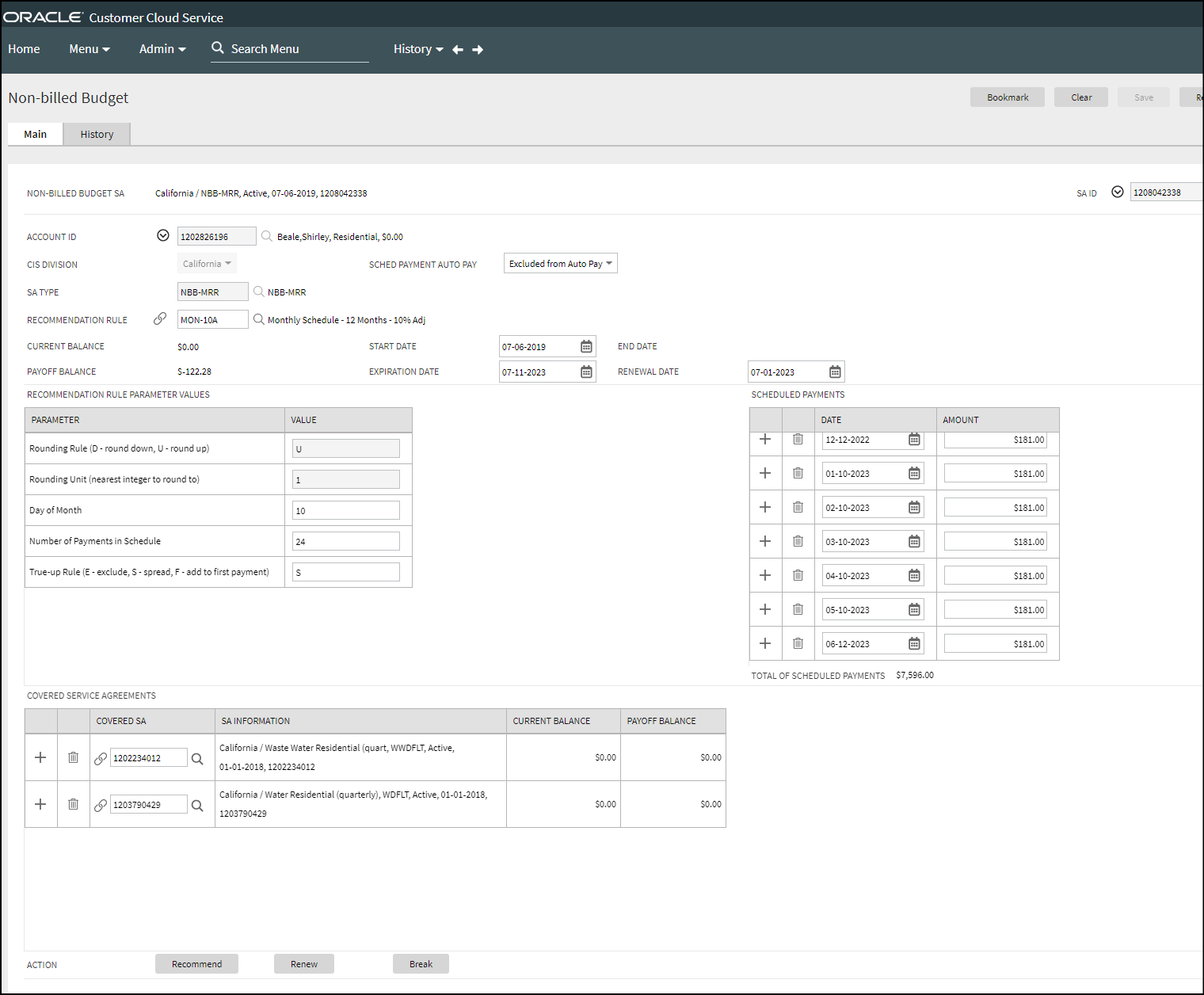
**Change Record**

| Date | Author | Version | Change Reference |
| --- | --- | --- | --- |
|  |  |  |  |
| 2/22/09 | Galina Polonsky | Draft 1a | No Previous Document |
| 4/12/09 | Colleen King |  | Multiple Changes in April |
| 5/19/09 | Colleen King |  | Updates per new guidelines |
| 10/21/10 | Geir Hedman |  | Updated Title and Content page |
| 2/8/11 | Geir Hedman |  | Updated Document and Visio |
| 9/5/2013 | Don Lee |  | Updated Document and Visio |
| 9/20/2017 | James Foreman |  | Updated algorithms |
| 09/30/2017 | Galina Polonsky |  | Reviewed, Approved |
| 06/03/2019 | Satya Kalavala |  | Updated format for v2.7 |
| 09/13/2024 | Kunal Nerkar |  | Updated Document and Visio for CCS 24B |
| 10/23/2024 | Line Prado |  | Reviewed |
| 12/16/2024 | Galina Polonsky |  | Reviewed, Approved |

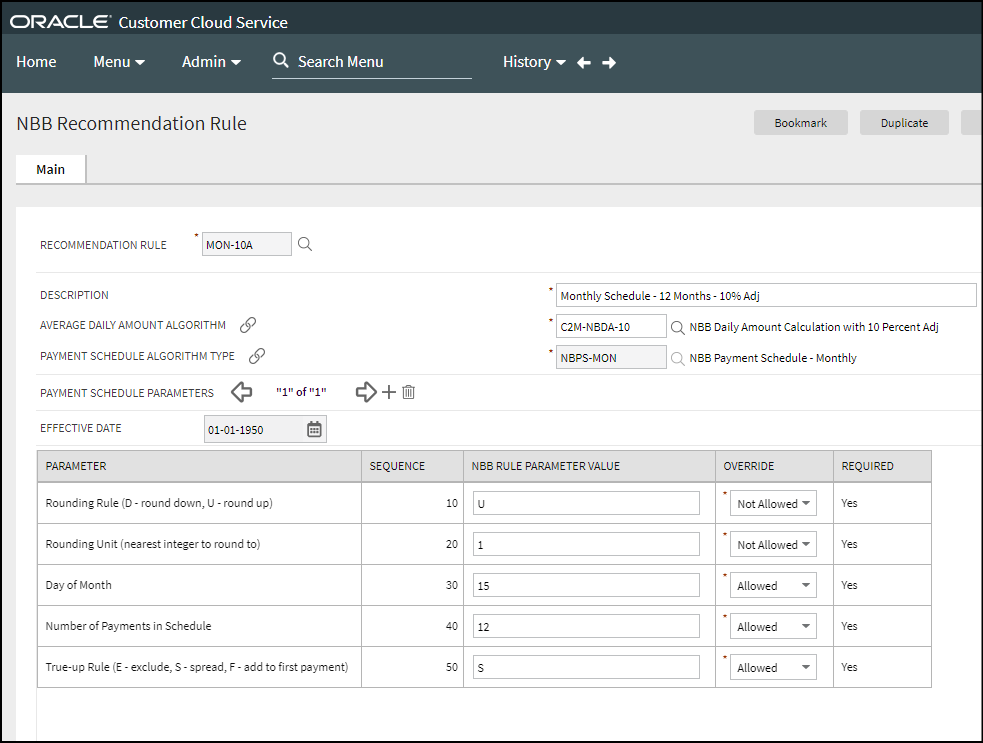
## Attachments:

### Account/Non-Billed Budget





### Admin Menu/Non Billed Budget Recommendation Rule

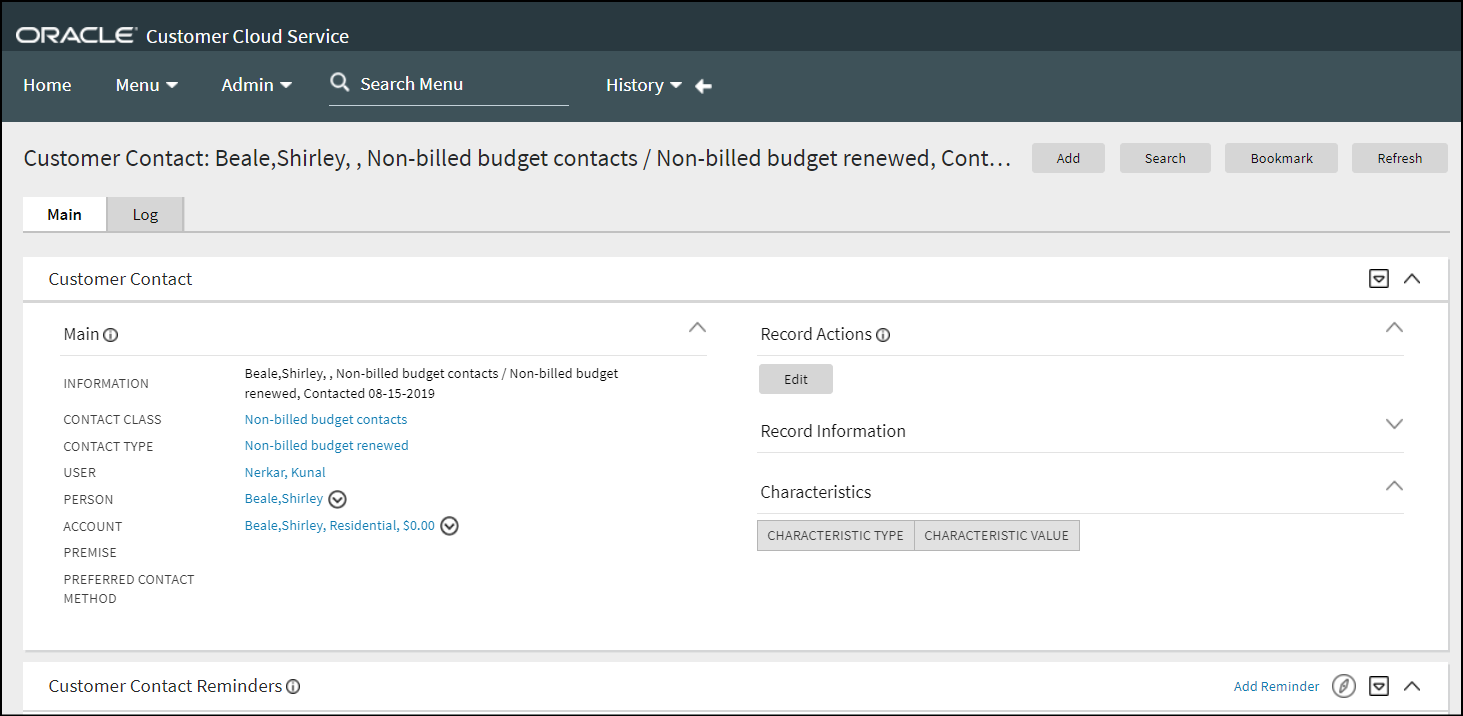


### Admin Menu/Installation Options

Installation Options Control Central Alert Algorithms

C1HNBBSA - Highlight Non-Billed Budget SA

### Customer Contact Created After Renewal

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