**CCS**

**24B**

**3.4.4.3a** **Cancel Budget**

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Last Updated: January 21, 2025

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2. To add additional approval lines, press [Tab] from the last cell in the table above.

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## Brief Description

**Business Process: 3.4.4.3a CCS.Cancel Budget**

**Process Type: Sub Process**

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

**Sibling Processes: 3.4.4.2a CCS.Monitor and True Up Budget, 3.4.4.3a CCS.Enroll in Budget, 4.2.2.10a CCS.Manage Budget Billing, 4.3.1.1a CCS.Process Budget Payments, 4.3.2.1 CCS.Manage Collection Process, 3.4.1.1 CCS.Manage Customer Contacts,**

This process describes the process used to cancel a [Budget Plan](#AdminMenuBudgetPlan). The process can be initiated by:

* Customer Inquiry
* Collection Process Event
* Stop Service

## Business Process Model Page 1



## Business Process Model Page 2



## Detail Business Process Model Description

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

**Actor/Role: CSR**

**Description:**

Upon receipt of request or inquiry about canceling the Budget Plan the CSR or Authorized User accesses Control Central Search to locate the customer in CCS(CC&B). The [Customer 360](#ControlCentralSearch) portal provide the CSR or Authorized User with valuable insight for overall budget related analysis of the customer.

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

|  |
| --- |
| Installation Options – Control Central Alerts |
| C1CIBUDGENRL - Budget Billing Enrollment |

**Configuration required Y Entities to Configure:**

|  |
| --- |
| Insight Group |
| Insight Type |

[**1.1**](#BusinessProcessModel) **Analyze/Review Customer/Account**

**Actor/Role: CSR**

**Description:**

There is dialogue with Customer. The CSR or Authorized User evaluates the account. [Account Financial History](#AccountFinancialHistory), [Billing History](#BillingHistory), [Credit Rating](#CreditCollectionHistory), and Credit and Collection History may be reviewed.

[**1.2**](#BusinessProcessModel) **Initiate Cancel Budget**

**Actor/Role: CSR/ Self-Service Application User**

**Description:**

At [Account](#AccountBudget) level the CSR or Authorized User will cancel the Budget.

The request for budget cancellation can also be initiated from Self-Service Application User.

[**1.3**](#BusinessProcessModel) **Request to Cancel Budget**

**Actor/Role: Self-Service Application**

**Description:**

The Self-Service Application will capture request for budget cancellation.

[**1.4**](#BusinessProcessModel) **Transform Message and Send Request**

**Actor/Role: OIC or SOA**

**Description**

The Oracle Integration Cloud/SOA will capture the request from the Self-Service Application and pass it to the CCS system.

Customizable process Y Process Name:

|  |
| --- |
| Custom Process |

[**1.**](#BusinessProcessModel)**5 Retrieve Budget Details**

**Actor/Role: CCS(CC&B)**

**Description:**

The CCS(CCB) will retrieve budget details and initiate budget cancellation.

**Scripts(s):**

|  |
| --- |
| C1BudgetDeta - Budget Details Service |

**Inbound Web Service(s):**

|  |
| --- |
| C1-Budget – Budget |

[**1.**](#BusinessProcessModel)**6 Cancel Budget**

**Actor/Role: CCS(CC&B)**

**Description:**

The Budget is canceled in CCS(CC&B).

Manual Process: The CCS (CCB) will cancel the budget based on request from the CSR or Authorized User on the basis of established business rules.

Automated Process: The CCS (CCB) will cancel the budget:

1. During collection process (if the collection process contains a Cancel Budget collection event)
2. When the service agreement is stopped.

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

|  |
| --- |
| COLL COND BG - Check if account is on a budget |

**Configuration required Y Entities to Configure:**

|  |
| --- |
| Collection Event Type |
| Collection Process Template |
| Collection Class Control |

**Scripts(s):**

|  |
| --- |
| C1BudgetDeta - Budget Details Service |

**Inbound Web Service(s):**

|  |
| --- |
| C1-Budget – Budget |

Customizable process N Collection Event:

|  |
| --- |
| The Collection Event Trigger –CET will activate a collection event to cancel the Budget |

**Note:** This task can be triggered manually by CSR or via Web Service from an external system.

[**1.7**](#BusinessProcessModel) **Update Account Budget/SA Recurring Charge History**

**Actor/Role: CCS(CC&B)**

**Description:**

When the Budget is canceled, any recurring charge with an effective date beyond the cancellation date is deleted. A new [recurring charge](#SARecurringCharge) amount of “0” is added for each affected Service Agreement. Each Service Agreement’s Current Balance is synchronized with its payoff balance (using sync adjustment type defined on the Service Agreement’s SA type). When a Service Agreement is stopped the Budget is canceled. Refer to 3.3.2.2 Stop Service.

Manual Process: When the CSR or Authorized User cancels the Budget, the Account’s Service Agreement(s) Recurring Charge History, and Current Balance is updated.

Automated Process: When a covered Service Agreement is stopped the Budget is canceled. Recurring Charge History and Current Balance is updated.

**Scripts(s):**

|  |
| --- |
| C1BudgetDeta - Budget Details Service |

**Inbound Web Service(s):**

|  |
| --- |
| C1-Budget – Budget |

**Note:** This task can be triggered manually by CSR or via Web Service from an external system.

[**1.8**](#BusinessProcessModel) **Sync Current Balance And Payoff Balance Of Covered SA’s**

**Actor/Role: CCS(CC&B)**

**Description:**

CCS(CCB) synchronizes Each Service Agreement’s Current Balance with its payoff balance (using sync adjustment type defined on the Service Agreement’s SA type).

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

|  |
| --- |
| C1-ADJT-CA - Payoff Amt = 0 / Current Amt = Adj Amount (no GL) |

**Configuration required Y Entities to Configure:**

|  |
| --- |
| Adjustment Type |
| SA Type |

**Note:** This task can be triggered manually by CSR or via Web Service from an external system.

[**1.9**](#_Business_Process_Model) **Determine Notification Method to Notify Customer**

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

**Description:**

CCS(CCB) determines the notification preference set by customer and initiates notification through preferred delivery method.

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

|  |
| --- |
| C1-NTF-DFPRF - Determine Default Contact for Notification Type |
| C1CRETMPLNTF – Create Template-Based Notification |
| C1-NT-VALCC - Validate Contact Class and Contact Type (BO Pre-Processing) |
| C1NTTSUBVL - Template-Based Subscription Notification Type Validation |
| C1BUDNFTMPD - Budget Notification Template Data |

**Business Object (Y/N) Business Object**

|  |
| --- |
| C1-NotifTypeTmplSubscription - Template-Based Subscription Notification Type |

**Configuration required Y Entities to Configure:**

|  |
| --- |
| Master Configuration |
| Notification Type |

[**2.0**](#BusinessProcessModel) **Transform Message and Process Details**

**Actor/Role: OIC or SOA**

**Description**

The Oracle Integration Cloud/SOA will transform the response to Self-Service Application.

Customizable process Y Process Name:

|  |
| --- |
| Custom Process |

[**2.1**](#BusinessProcessModel) **Receive Notification for Budget Cancellation**

**Actor/Role: Customer or Self-Service Application User**

**Description:**

The Customer or Self-Service Application User will Receive Notification about cancellation of Budget.

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

**Actor/Role: CSR**

**Description:**

Associated with established Business Rules the CSR or Authorized User enters necessary information about the [Budget Plan](#AdminMenuBudgetPlan) for the Customer. Refer to 3.4.1.1 Manage Customer Contacts.

[**2.3**](#BusinessProcessModel) **Process Response**

**Actor/Role: Self-Service Application**

**Description:**

The Self-Service Application will process the response about successful budget cancellation and initiate notification**.**

[**2.4**](#BusinessProcessModel) **Receive Message about Budget Cancellation**

**Actor/Role: Customer or Self-Service Application User**

**Description:**

The Customer or Self-Service Application User will Receive Message Receive Message about Successful Budget Cancellation.

## Test Assets related to the Current Process

| Testing Asset Sr.No | Testing Asset-Flows | No Of Data sets |
| --- | --- | --- |
|  |  |  |
| 1 | URM-CCS-3443a-001-Cancel-Existing-Budget | 3 |
| 2 | URM-CCS-3443a-002-Cancel-Existing-Budget-Via-Stop-SA | 3 |
| 3 | URM-CCS-3443a-003-Budget-Is-Cancelled-Via-Collection-Process | 3 |

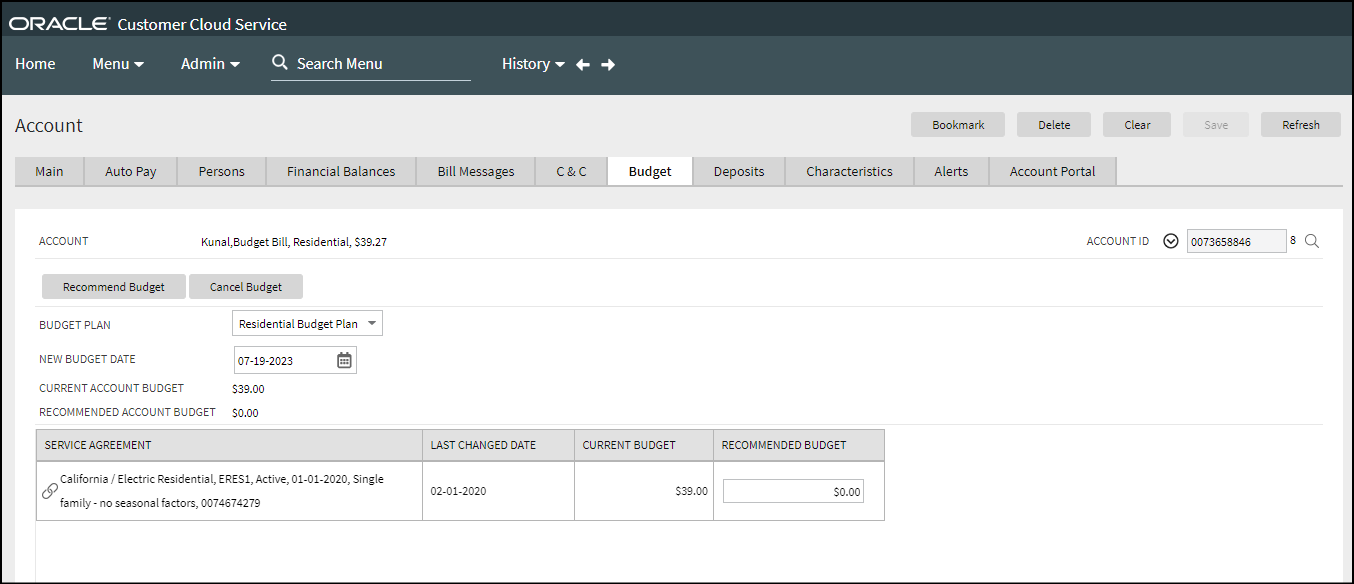
## Document Control

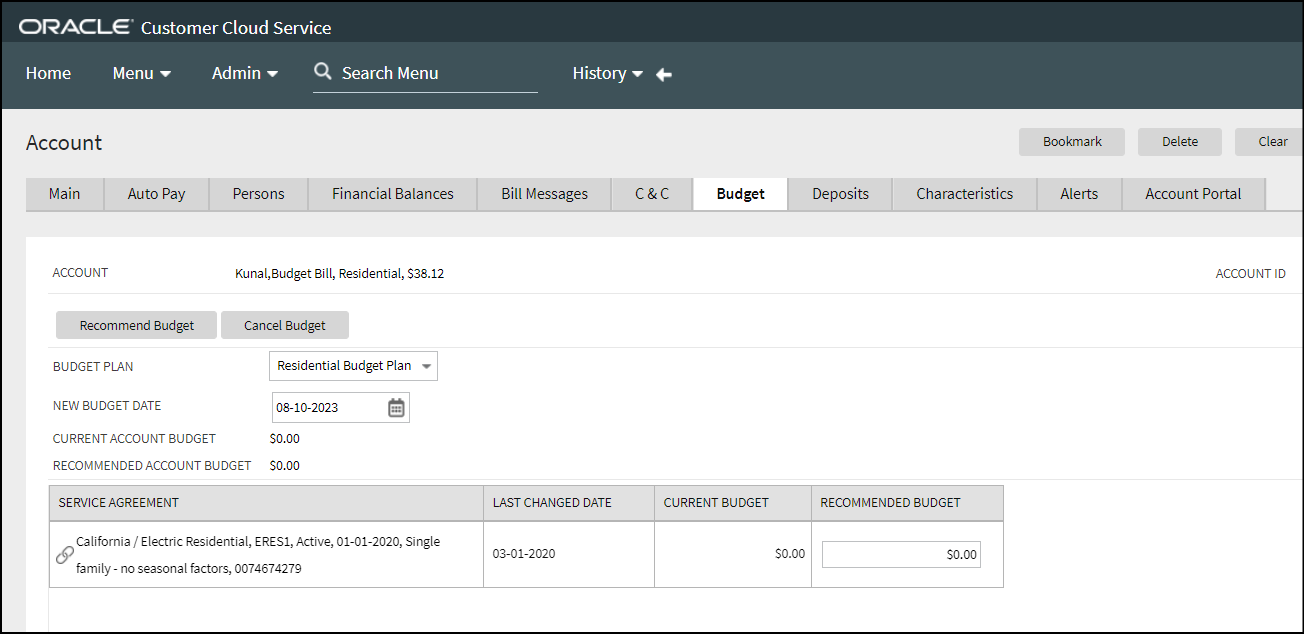
**Change Record**

| Date | Author | Version | Change Reference |
| --- | --- | --- | --- |
|  |  |  |  |
| 4/15/09 | Colleen King |  | Multiple Changes in April |
| 5/18/09 | Colleen King |  | Changes based on new guidelines |
| 8/20/09 | Colleen King |  | After Review |
| 10/21/10 | Geir Hedman |  | Updated Title and Content page |
| 11/30/10 | Ze’ev Lavee |  | Technical Updates |
| 2/8/11 | Geir Hedman |  | Updated Document and Visio |
| 8/7/13 | Ahad G.Abbasi |  | Updated for CC&B v2.4 |
| 08/15/13 | Galina Polonsky |  | Reviewed, Approved |
| 09/07/2017 | Ekta Dua |  | Updated doc and visio to v2.6 |
| 09-19-2017 | James Foreman |  | Updated algorithms |
| 09/30/2017 | Galina Polonsky |  | Reviewed, Approved |
| 06/03/2019 | Satya Kalavala |  | Updated format for v2.7 |
| 08/10/2024 | Kunal Nerkar |  | Updated Document and Visio for CCS 24B |
| 10/23/2024 | Line Prado |  | Reviewed |
| 12/15/2024 | Galina Polonsky |  | Reviewed, Approved |

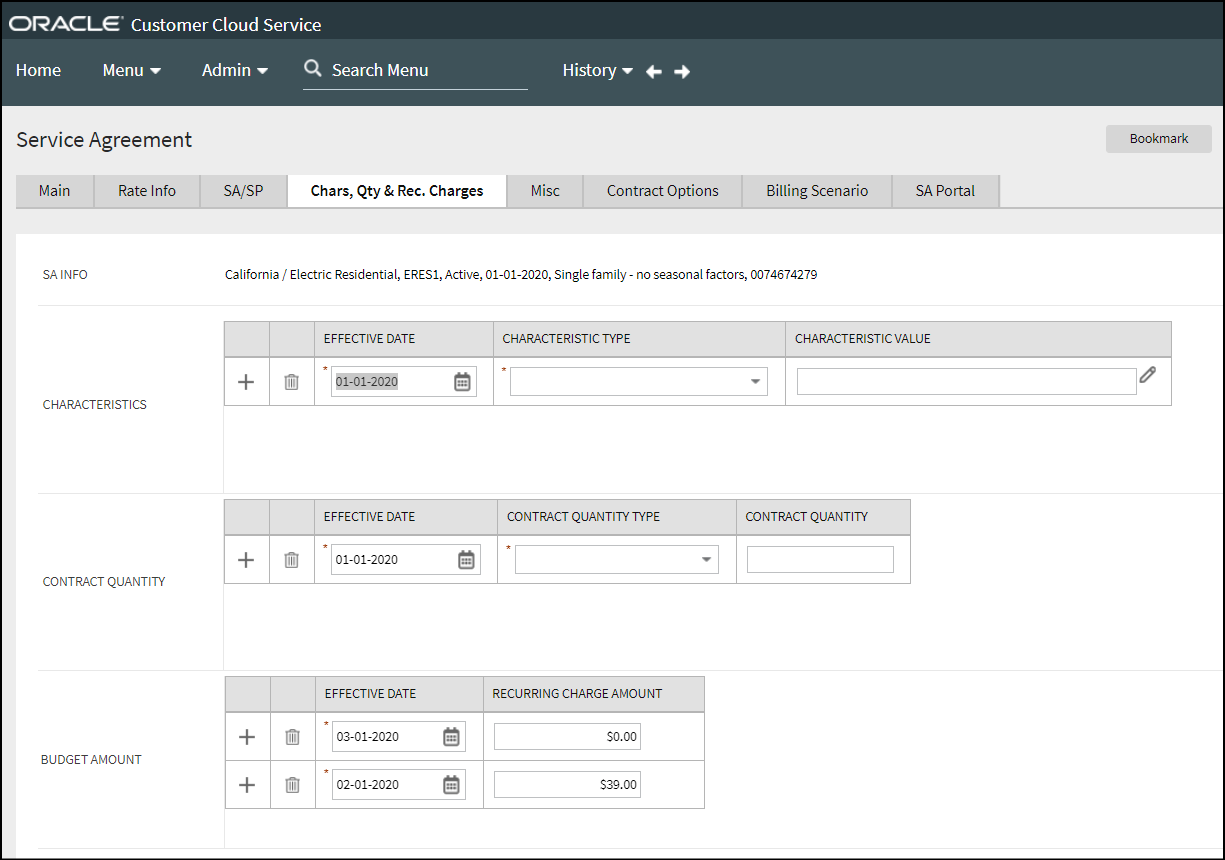
## Attachments:

### Account/Budget

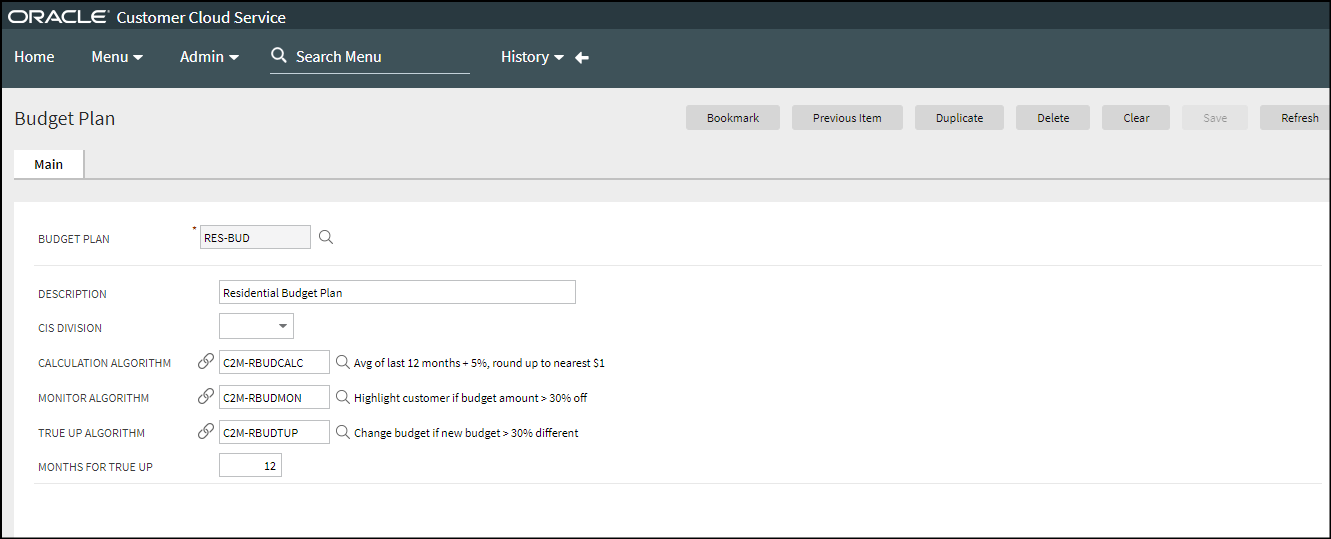




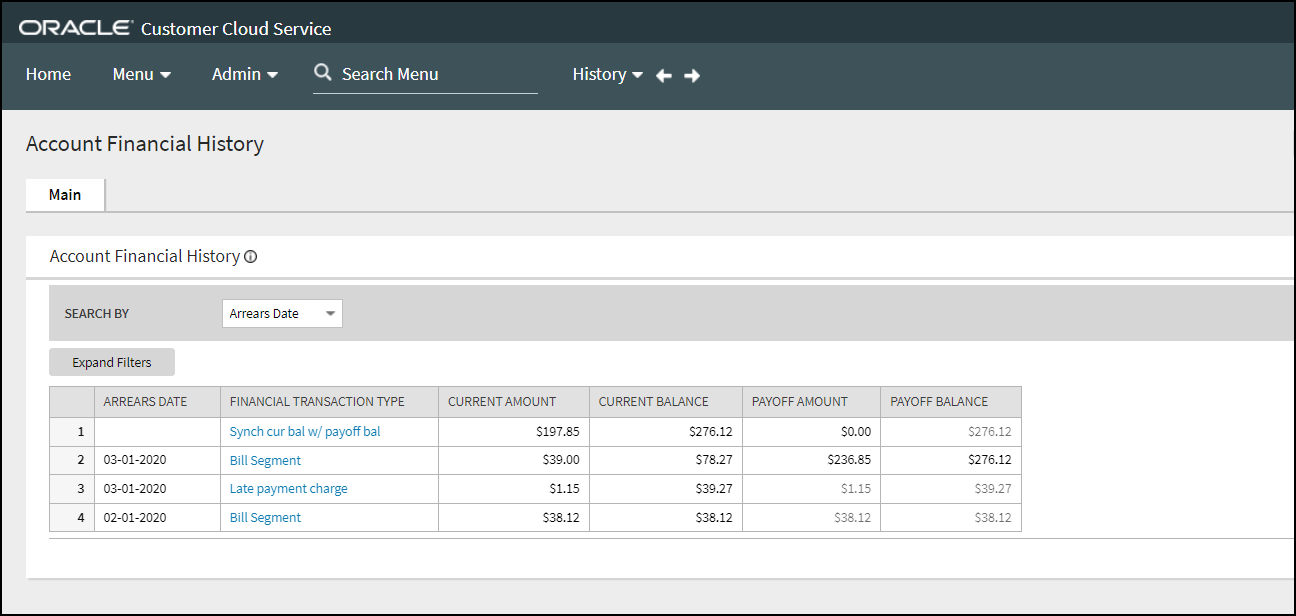
### Service Agreement/Chars, Qty & Rec Charges



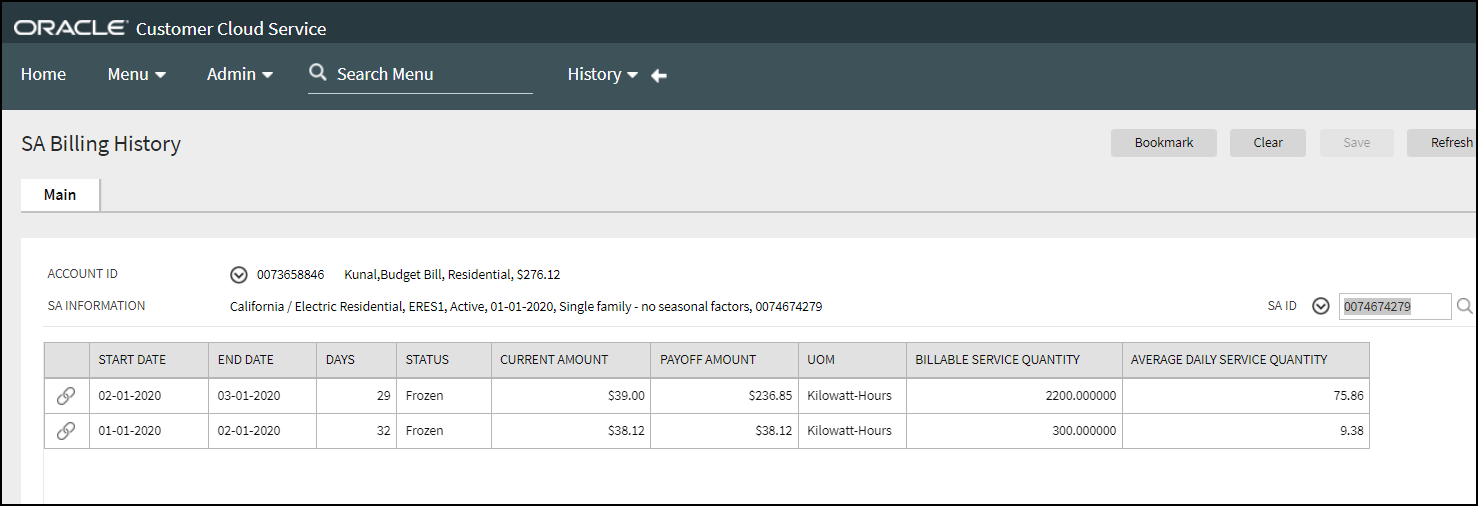
### Admin Menu/Budget Plan



### Account Financial History



### Billing History

****

### Miscellaneous Information:

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.

**Inbound Web Services:**

|  |  |
| --- | --- |
| C1-Budget - Budget | REST |
| CXBudgetDetails - Retrieve Budget Details | SOAP |
| WXBudgetDetails - Retrieve Budget Details | SOAP |