C2M.CCB v2.6

3.3.6.2 Start Premise Based Service For Landlord - Tenant

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ORACLE

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Brief Description

Business Process: **3.3.6.2 C2M.CCB.Start Premise Based Service for Landlord - Tenant**
Process Type: **Sub Process**
Parent Process: **3.3.2 C2M.CCB.Manage Service Agreement**
Sibling Processes: **3.3.2.1 C2M.CCB.Start Premise Based Service, 3.3.2.3 C2M.CCB.Stop Premise Based Service, 3.3.2.2 C2M.CCB.Start Non-Premise Based Service, 3.3.2.4 C2M.CCB.Stop Non-Premise Based Service, 3.3.6.3 C2M.CCB.Stop Premise Based Service for Landlord - Tenant, 3.3.3.2 C2M.CCB.Determine Customer Deposit, 3.3.1.1 C2M.CCB.Establish Person and/or Account, 3.4.1.1 C2M.CCB.Manage Customer Contacts, 5.3.2.1 C2M.CCB.Manage Field Activities and Field Orders, 3.4.4.1a C2M.CCB.Enrollment in Budget, 3.4.4.1b C2M.CCB.Enrollment in Non-Billed Budget, 4.3.2.1 C2M.CCB.Manage Collection Process, 5.1.5.1 C2M.CCB.Manage Metered Site**

This process describes the Start process for Premise based service for when a landlord is responsible for the property between tenants, or when the Service is transferring from tenant to tenant.

When a landlord is associated with a property and would like to have service reverted when a tenant moves out, a contract called a Landlord Agreement is established in the system. The Landlord can indicate preferences for each type of service provided at the property. The landlord can choose to have seasonal preferences. It is possible some services may not revert at all depending on the landlord's preferences.

An Account is established to use for reversion of service and then associated with the Landlord Agreement.

Based on configured business rules the system uses the information defined on landlord agreement to create a Service Agreement(s) for the landlord when service for an existing tenant is stopped.

Many organizations need to group and manage multi-unit properties quickly and effectively. The organization can make use of Premise Management functionality to assist with large multi-unit properties. If configured, Premise Management functionality can facilitate grouping of Premises together under a defined single premise called a Parent Premise. It can provide for a single view of properties for a landlord, including status of service. Premise Management functionality provides the ability to change landlord or service status for a group of premises at the same time in one transaction.

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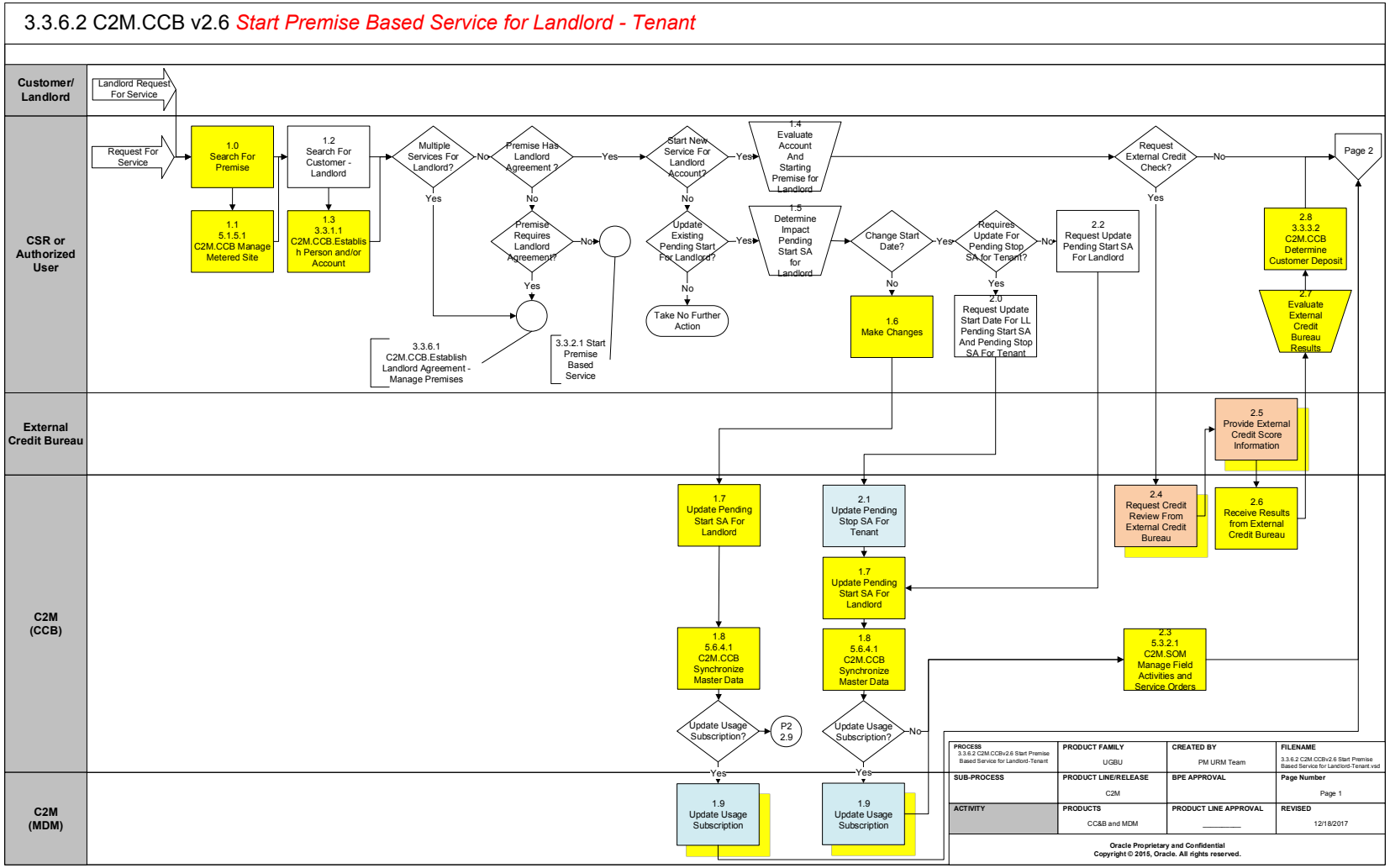
Business Process Model Page 1



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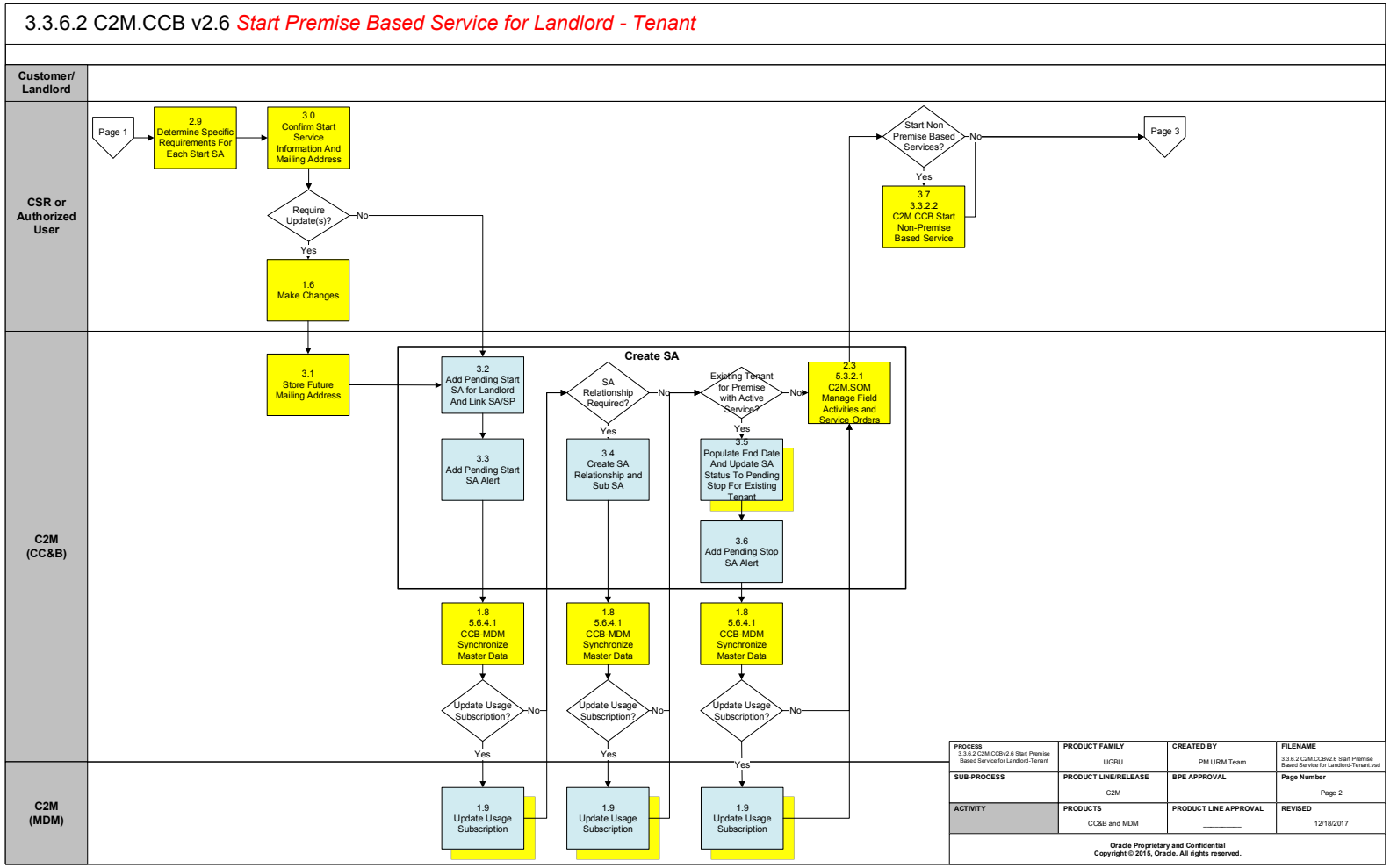

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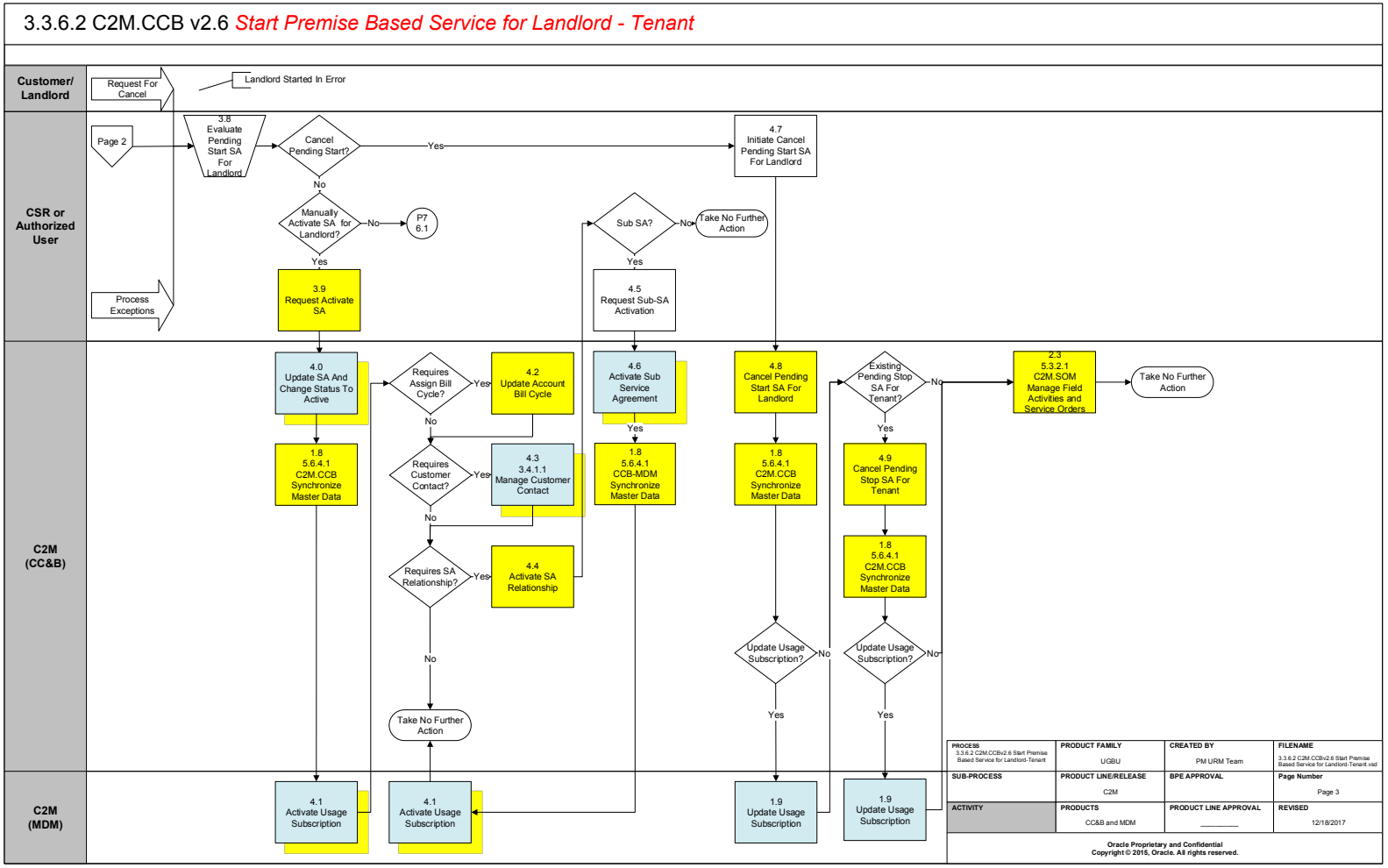

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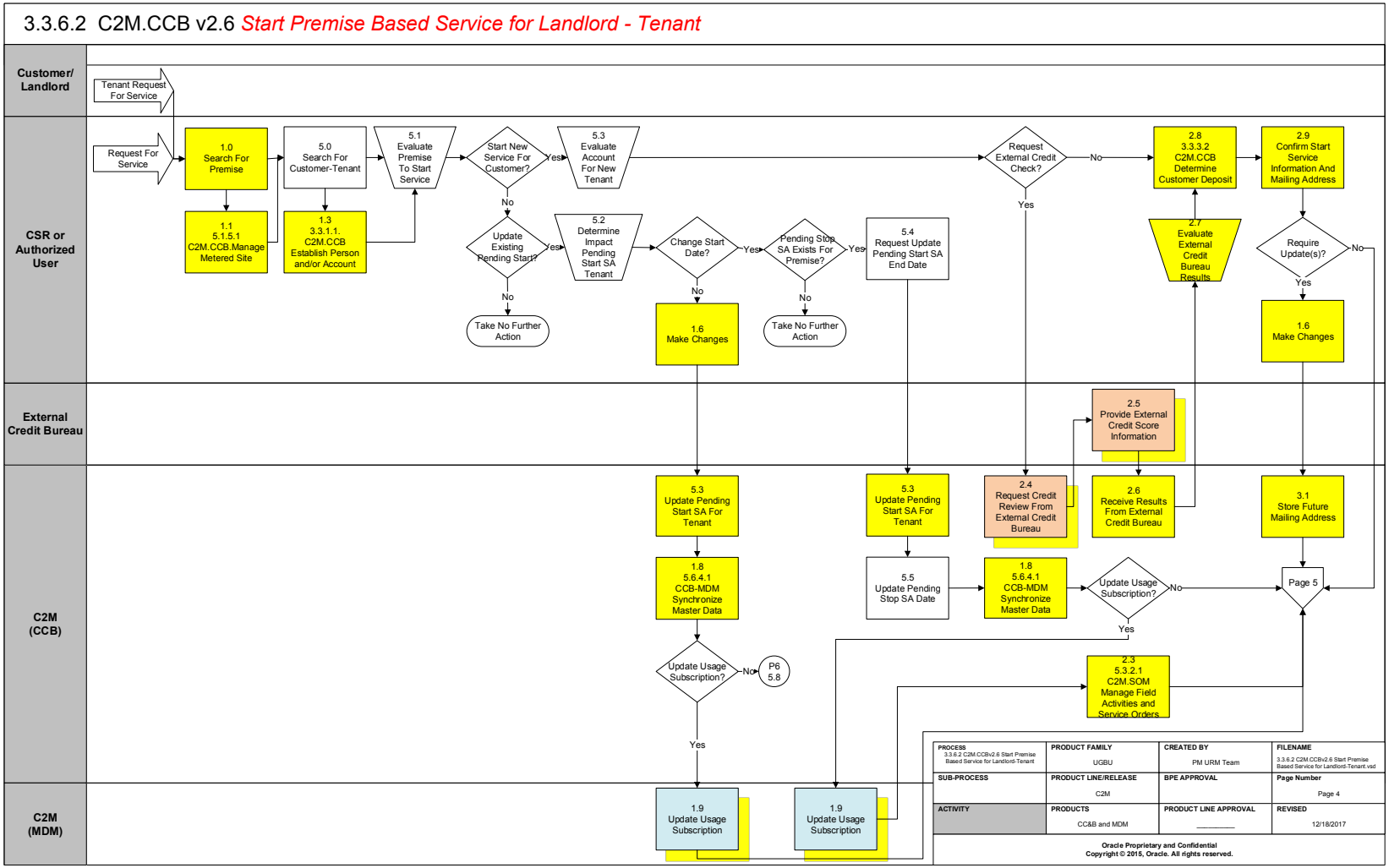

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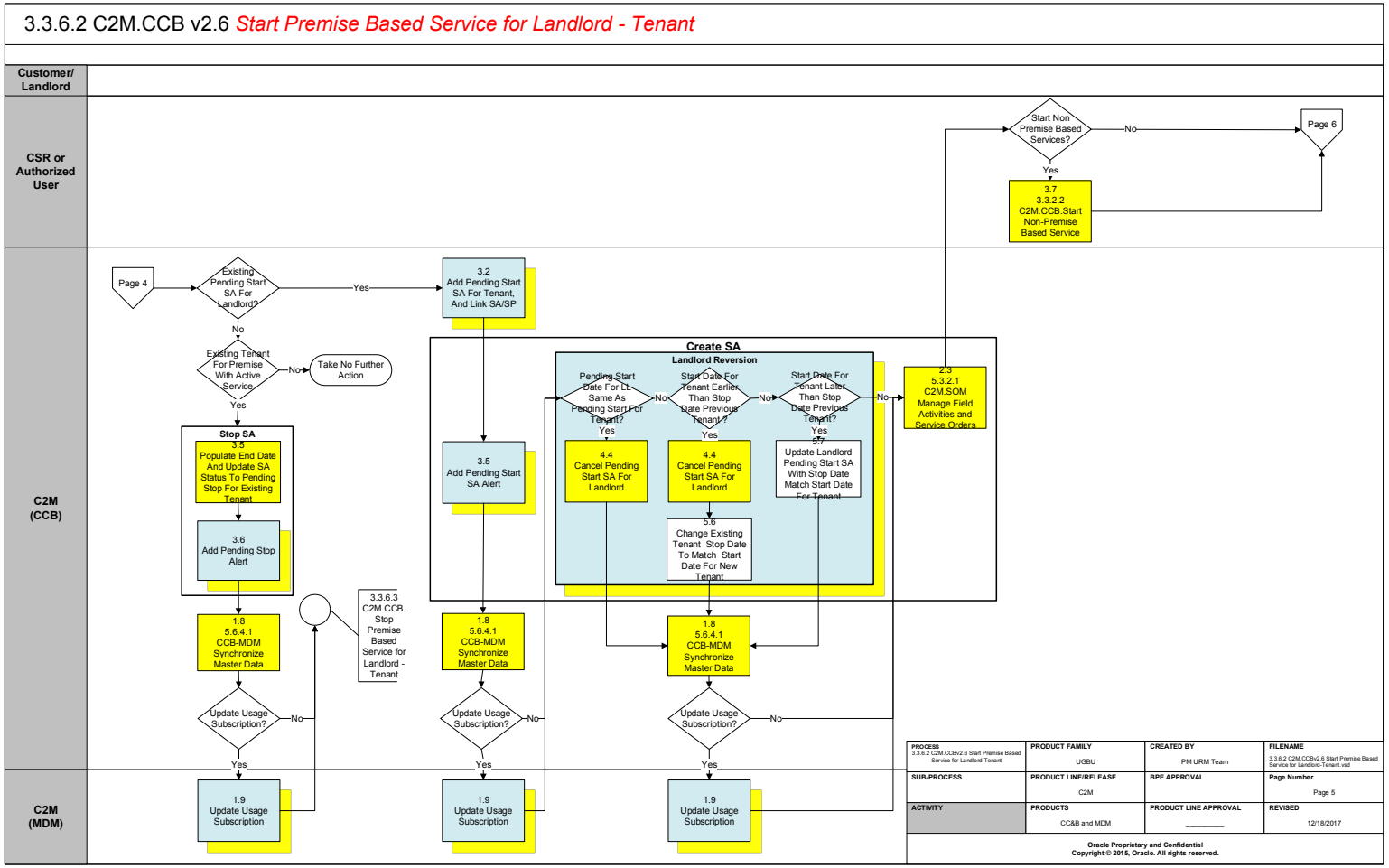

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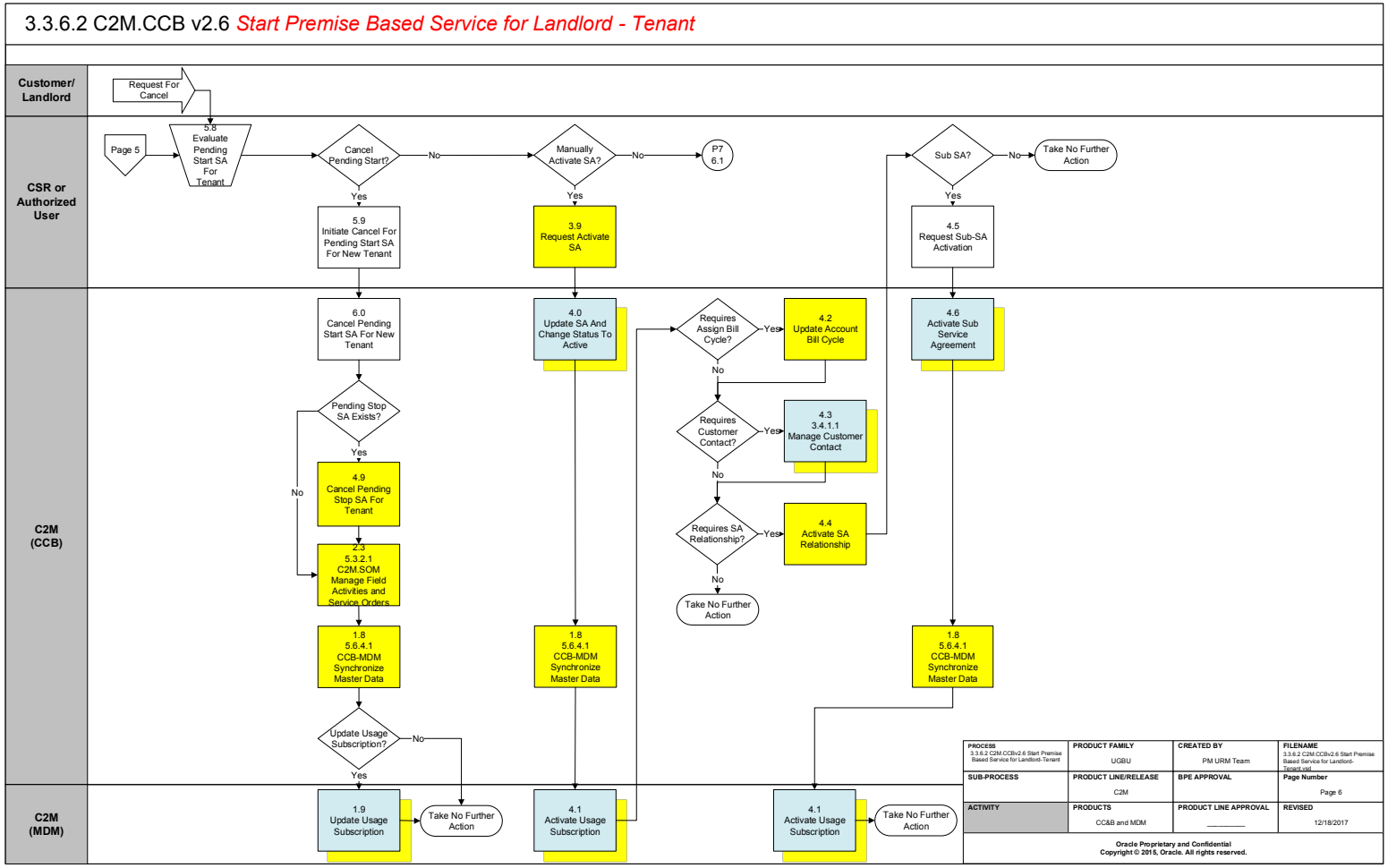

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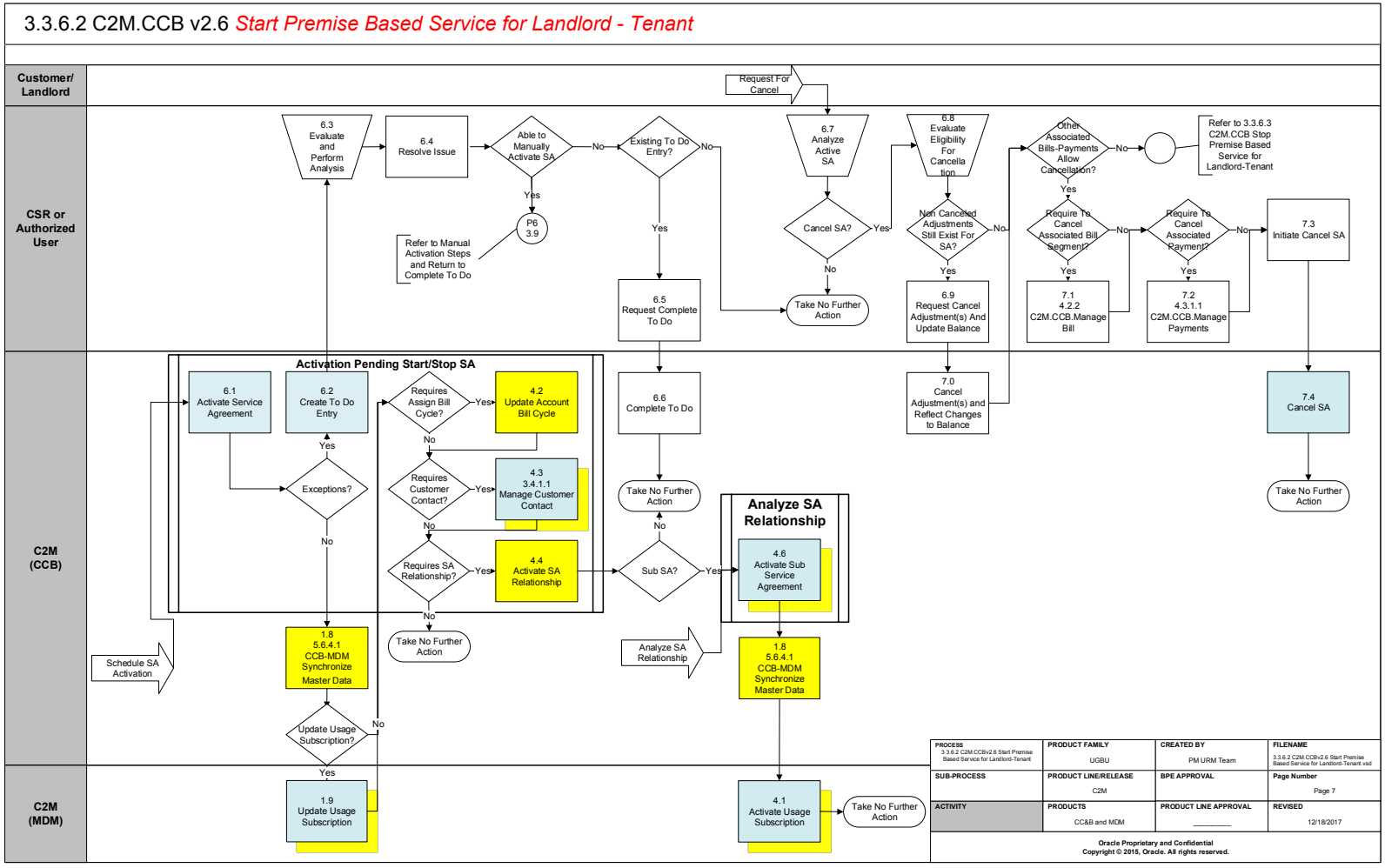

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Detail Business Process Model Description

1.0 Search for Premise
Actor/Role: CSR or Authorized User
Description:
Upon receipt of request for Start Service, the CSR or Authorized User locates the premise address in CCB using Control Central Search The CSR or Authorized User first determines the address is in the service territory. If not, the CSR or Authorized User refers the caller to appropriate agency and process stops with no further action.

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

Installation Option – Control Central Alert Algorithm
C2MPREM-INFO – This algorithm formats the "Premise Info" that appears throughout the system. Address 1, City, State, Postal

Configuration required Y **Entities to Configure:**

Installation Options - Framework
Zones

1.1 5.1.5.1 C2M.CCB Manage Metered Site
Actor/Role: CSR or Authorized User
Description:
The Premise is associated with a new development or new property to be established in C2M(CCB). The customer request could be from a Property Manager, Developer, owner or tenant. Refer to 5.1.5.1 C2M.CCB Manage Metered Site.

1.2 Search for Customer - Landlord
Actor/Role: CSR or Authorized User
Description:
Upon receipt of request for Start Service, the CSR or Authorized User locates the customer (landlord) 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 for the customer including Pending Starts.

C2MPERS-INFO – This person information

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Process Plug-in enabled Y	**Available Algorithm(s):**	algorithm display summary information (name, phone number) that appears adjacent to a person ID throughout the system.
		C1-ACCT-INFO - This algorithm formats the "Account Information" that appears throughout the system.
		C1_PENDST-DF - Highlight Pending Start Service Agreements

Configuration required Y	**Entities to Configure:**	Installation Options - Framework

1.3 3.3.1.1 C2M.CCB Establish Person and or Account

Actor/Role: CSR or Authorized User

Description:

The landlord needs to be established in C2M(CCB) as a customer, requires a separate account to associate with the Landlord Agreement. If a tenant is starting service, they need to be established in C2M(CCB) as a customer. Refer to 3.3.1.1 Establish Person and or Account

1.4 Evaluate Account and Starting Premise for Landlord

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User reviews both the Account and Premise to determine if service can be started for the landlord as a customer in C2M(CCB). Typically, there are business rules and procedures to make this decision for starting service.

1.5 Determine Impact on Pending Start SA for Landlord

Actor/Role: CSR or Authorized User

Description:

Before any changes or updates are made for a Pending Start SA for a landlord, the CSR or Authorized User reviews how the changes impact the existing Pending Start SA or other related Starts or Stops.

1.6 Make Changes

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Actor/Role: CSR or Authorized User
Description:
After confirming the change. The CSR or Authorized User enters required information in C2M(CCB). These changes could be updates for the Account or Person record, i.e. Mailing address. These changes do not impact start or stop dates. The system defaults to mailing premise. The CSR or Authorized User can change the default. C2M(CCB) address sources include Person, Premise, and Account. The address information is effective when the Service Agreement is activated. The CSR or Authorized User may need to make changes to Pending Start/Pending Stop dates.

1.7 Update Pending Start SA for Landlord

Actor/Role: C2M(CCB)
Description:
The Pending Start SA for the landlord/tenant is updated in C2M(CCB) with any changes including effective dates.

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

C2MSAI-INFO - This Installation algorithm formats the "SA Information" that appears throughout the system.
C2M-SASPFWCR – Create field activities for pending start and pending stop service agreements if Field Activities do not already exist.
C2M-SAT-INFO – This SA Type algorithm formats the “SA Information” that appears throughout the system.
C1_PENDST-DF - Highlight Pending Start Service Agreements as Control Central alerts.

Configuration required Y **Entities to Configure:**

Installation Options-Framework
SA Type

C1-SABasic - Service Agreement Basic
C1-MDM1SA - SA Information for MDM1 SA Sync – Used only when Integrating to Oracle MDM
C1-MDM2SA - MDM2 SA – Used only when Integrating to Oracle MDM
C1-NMSSA - SA Information for NMS Sync - Used only when Integrating to Oracle MDM
C1-NextScheduleReadDate - MDM Next Read Schedule Read Date SA – Used only when

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Business Object Y	**Business Object:**	Integrating to Oracle MDM

1.8 CCB-MDM Synchronize Master Data
Actor/Role: C2M(CCB)
Description:
Master Data is synchronized for the Pending Start SA for the Landlord.

1.9 Update Usage Subscription
Actor/Role: C2M(MDM)
Description:
Pending Start Usage Subscription for the Landlord is updated in C2M.MDM.

Process Plug-in algorithm-in enabled Y	**Available Algorithm(s):**	D2-USINFO - Usage Subscription Information
		D1-DEFTIMZON - Default Time Zone value based on Installation Option
		D2-USSPDTVAL - Validate Start and Stop Dates of Usage Subscription's Service Points
		D2-USUGDTVAL - Validate Effectivity Period of Usage Subscription's Usage Groups
		D2-USFOVAL - Validate the Start and Stop Dates of US Factor Overrides
		D2-VALUSTMZN - Validate Usage Subscription Time Zone
		D2-VAL-SUBUS - Validate sub usage Subscription
		D2-VALUSMC - Validate Measuring Component Class of Direct Channel

Configuration required Y	**Entities to Configure:**	Usage Subscription Type
		Usage Recipient (Service Provider)
Business Object Y	**Business Object:**	D2-UsageSubscriptionType

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2.0 Request Update Start Date for LL Pending Start SA and Pending Stop SA for Tenant
Actor/Role: CSR or Authorized User
Description:
Based on information received and established business rules, The CSR or Authorized User changes dates for the Pending Start SA for the landlord and Pending Stop SA for the tenant.

2.1 Update Pending Stop SA for Tenant
Actor/Role: C2M(CCB)
Description:
The Pending Stop SA for an existing tenant is updated in C2M(CCB).

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

C2M-SASPFWCR – Create field activities for pending start and pending stop service agreements if Field Activities do not already exist.
C2M-SAT-INFO – This SA Type algorithm formats the “SA Information” that appears throughout the system.
C2M LL REV - This algorithm causes service to be reverted to a landlord's account when a tenant stops service at a service point covered by a landlord agreement

Configuration required Y **Entities to Configure:**

Installation Options-Framework
SA Type

Business Object Y **Business Object:**

ServiceAgreement – ServiceAgreement
C1-MDM1SA - SA Information for MDM1 SA Sync – Used only when Integrating to Oracle MDM
C1-MDM2S - MDM2 SA – Used only when Integrating to Oracle MDM

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2.2 Request Update Pending Start SA for Landlord
Actor/Role: CSR or Authorized User
Description:
There may be a Pending Start SA for the landlord without any existing customer at the Premise. The CSR or Authorized User enters changes for the Pending Start SA for the landlord.

2.3 5.3.2.1 C2M.SOM Manage Field Activities and Service Orders Group: Create SA
Actor/Role: C2M(CCB)
Description:
Refer to 5.3.2.1 C2M.SOM Manage Field Activities and Service Orders for creation, update, cancel and completion of Field Activities. Algorithms here are reference only. 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.

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

C2M-SASPFWCR – Create field activities for pending start and pending stop service agreements if Field Activities do not already exist.
C1-FAIN-INFO - This Installation algorithm formats the "FA Information" that appears throughout the system.–
C1-FAAD-INFO - Formats the field activity additional information that appears on the field activity page.
C2M-FACCHARG – Field Activity Completion – this algorithm applies charges by creating an adjustment
CCAL-FAERMSG - Highlight (Alert) FAs with outstanding outgoing message

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.
FACOMPL - The field activity completion process completes field activities and field orders using the

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records in the various field activity staging tables.
SAACT - The service agreement activation process updates the status and SA/SP reads for pending start and pending stop service agreements.

Configuration required Y **Entities to Configure:**

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

2.4 Request Credit Review from External Credit Bureau
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User determines further information is needed and performs an external credit check. An external review is conducted. C2M(CCB) has functionality to interface with Credit Agencies. This is a complete custom process. The information is returned to C2M(CCB).

Customizable Process Y

Credit Bureau Interface – 100% Custom Process.

2.5 Provide External Credit Score Information
Actor/Role: External Credit Bureau
Description:
The External Credit Bureau collects and provides the required external credit score information.

Customizable Process Y

Credit Bureau Interface – 100% Custom Process.

2.6 Receive Results from External Credit Bureau
Actor/Role: C2M(CCB)
Description:
The CSR or Authorized User receives the credit information from the External Credit Bureau. This is a complete custom process.

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Customizable Process Y

Credit Bureau Interface – 100% Custom Process.

2.7 Evaluate External Credit Bureau Results
Actor/Role: CSR or Authorized User
Description:
Based on established business rules, the CSR or Authorized User reviews credit information to determine the overall credit risk for the Company.

2.8 3.3.3.2 C2M.CCB Determine Customer Deposit
Actor/Role: CSR – C2M(CCB)
Description:
A Customer Deposit may be required. Refer to Determine Deposit Process 3.3.3.2 C2M.CCB Determine Customer Deposit for calculating and updating deposit requirements.

2.9 Determine Specific Requirements for Each Start SA
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User gathers information to initiate the Start Service process. Start Service can be the result of backdating or reconnection due to a previous cut for non-pay. The CSR or Authorized User selects the Premise and determines the Service Points to start. The CSR or Authorized User determines the SA Type, Start Option, SIC or Budget information. Start options may include Connection fees, Characteristics for specific charges, Contract riders, Contract Terms, or Rate determination. The Service Agreement Type can default based on Service Point Type.
.

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

C2MSAI-INFO - This Installation algorithm formats the "SA Information" that appears throughout the system.
C2M-SASPFWCR – Create field activities for pending start and pending stop service agreements if Field Activities do not already exist.
C2M-SAT-INFO – This SA Type algorithm formats the “SA Information” that appears throughout the system.

Configuration required Y **Entities to Configure:**

SA Type
SA Start Options
Installation Options - Frameworks

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3.0 Confirm Start Service Information and Mailing Address
Actor/Role: CSR or Authorized User
Description:
There is dialogue with the Customer. Start Information is confirmed including mailing address.

3.1 Store Future Mailing Address
Actor/Role: C2M(CCB)
Description:
The mailing address information is stored until the Service Agreement is activated.

Business Object (Y/N)	**Business Object:**	Address Premise business object for address

Configuration required Y	**Entities to Configure:**	Postal Code Default
		Installation Options - Framework
		Bill Route Type
		Country

3.2 Add Pending Start SA for Landlord and Link SA/SP Group: Create SA
Actor/Role: C2M(CCB)
Description:
C2M(CCB) creates a Service Agreement for the landlord in Pending Start status. Through Start Service Initiation, Service Point information is linked to the Service Agreement.

Process Plug-in enabled Y	**Available Algorithm(s):**	C2M-SASPFWCR – Create field activities for pending start and pending stop service agreements.

Configuration Y	**Entities to Configure:**	FA Type
		SA Type
		SA start option
		FA Type Profile
		Dispatch Groups

3.3 Add Pending Start Alert Group: Create SA
Actor/Role: C2M(CCB)
Description:
C2M(CCB) creates a Dashboard Alert for the Pending Start Service Agreement.

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Process Plug-in enabled Y	**Available Algorithm(s):**	C1_PENDST-DF - Highlight Pending Start Service Agreements as Control Central alerts.
		CCAL-FAERMSG Highlight FAs with outstanding outgoing messages

Configuration Y	**Entities to Configure:**	Installation Options - Framework

3.4 Create SA Relationship and Sub SA Group: Create SA

Actor/Role: C2M(CCB)

Description:

If configured, C2M(CCB) creates the SA Relationship and Sub SA for the associated Pending Start Service Agreement as applicable. A "SA Type – SA Creation" algorithm can trigger the creation of an SA Relationship record. The details in SA Type SA Relationship Type indicate if and how a Sub-Service Agreement(s) should be created. The creation of a Sub-Service Agreement can trigger other actions such as the creation of a True Up Monitor (See 3.3.8.1 C2M.CCB.Establish and Maintain Net Metering Energy Metering Service for details on True Up Monitors).

Process Plug-in enabled Y	**Available Algorithm(s):**	C1_PENDST-DF - Highlight Pending Start Service Agreements as Control Central alerts.
		C1-SAT-SARL – This algorithm type creates an SA Relationship record as well as the Sub Service Agreement.
		C1-SAT-TUM Creates a True Up Monitor for a Sub Service Agreement

Configuration required Y	**Entities to Configure:**	SA Type
		SA Relationship Type
		SA Type SA Relationship Type
		Service Task Type
		Characteristic Type
		Start Options

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Business Object Y	**Business Object:**	C1-NEMTrueUpTask C1-NEMTrueUpTaskType

3.5 Populate End Date and Update SA Status to Pending Stop for Existing Tenant Group: Create SA Group: Stop SA

Actor/Role: C2M(CCB)
Description:
When service is started for a landlord or tenant, a Pending Stop SA(s) is created for the existing customer that has existing active service.

Process Plug-in enabled Y	**Available Algorithm(s):**	C2M-SASPFWCR – Create field activities for pending start and pending stop service agreements if Field Activities do not already exist. C2M-SAT-INFO – This SA Type algorithm formats the "SA Information" that appears throughout the system.

Configuration required Y	**Entities to Configure:**	Installation Options-Framework SA Type

3.6 Add Pending Stop SA Alert Group: Create SA Group: Stop SA

Actor/Role: C2M(CCB)
Description:
C2M(CCB) creates a Dashboard Alert for the Pending Stop Service Agreement.

Process Plug-in enabled Y	**Available Algorithm(s):**	C1-STOP-SA – Highlight Pending Stop Service Agreements as Control Central alerts

Configuration required Y	**Entities to Configure:**	Installation Options - Framework

3.7 3.3.2.2 Start Non-Premise Based Service

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Actor/Role: CSR or Authorized User
Description:
Refer to 3.3.2.2 C2M.CCB Start Non-Premise Based Service.

3.8 Evaluate Pending Start SA for Landlord

Actor/Role: CSR or Authorized User

Description:
The CSR or Authorized User reviews the pending start Service Agreement. Prior to Service Agreement activation, it may be determined the Service Agreement needs to be canceled. The customer (landlord) may call and indicate they are not moving in or taking responsibility for utility charges for the given Premise. They may request to cancel the request to start. The CSR or Authorized User may need to manually start the Service Agreement to expedite Billing or to process an anomaly.

3.9 Request Activate SA

Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User manually activates the Service Agreement in C2M(CCB).

4.0 Update SA and Change Status to Active Group: Service Agreement Activation Process

Actor/Role: C2M(CCB)
Description:
The Service Agreement status is transitioned to active in C2M(CCB).
Manual Process: The CSR or Authorized User less frequently may transition the Service Agreement to Active as a result of exception processing.
Automated Process: C2M(CCB) will automatically transition the Service Agreement to Active status when all required information is made available.

Process Plug-in enabled N	**Available Algorithm(s):**	C1-SACR-AT This SA creation algorithm activates a pending start SA at the time of creation and is only applicable for non-service SA Types
Customizable process N	**Process Name:**	SAACT - The service agreement activation process updates the status and SA/SP reads for pending start and pending stop service agreements.

4.1 Activate Usage Subscription

Actor/Role: C2M(MDM)

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Description:
The Usage Subscription for the Landlord is transitioned to active in C2M.MDM.

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

D2-USINFO - Usage Subscription Information
D1-DEFTIMZON - Default Time Zone value based on Installation Option
D2-USSPDTVAL - Validate Start and Stop Dates of Usage Subscription's Service Points
D2-USUGDTVAL - Validate Effectivity Period of Usage Subscription's Usage Groups
D2-USFOVAL - Validate the Start and Stop Dates of US Factor Overrides
D2-VALUSTMZN - Validate Usage Subscription Time Zone
D2-VAL-SUBUS - Validate sub usage Subscription
D2-VALUSMC - Validate Measuring Component Class of Direct Channel

Configuration required Y **Entities to Configure:**

Usage Subscription Type
Usage Recipient (Service Provider)

Business Object Y **Business Object:**

D2-UsageSubscriptionType

4.2 Update Account's Bill Cycle

Actor/Role: C2M (CCB)
Description:
If the account's bill cycle is not protected, the bill cycle will be changed to reflect the service point's measurement cycle.

Configuration required Y **Entities to Configure:**

Bill Cycle
Measurement Cycle

4.3 Add Customer Contact

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Actor/Role: C2M (CCB)
Description:
A Customer Contact is added in C2M (CCB). If configured, C2M (CCB) can automatically create a Customer Contact when a Service Agreement is activated. Note C2M (CCB) creates a Dashboard Alert for the Customer Contact information and displays the last contact in the Dashboard Alert, refer to process 3.4.1.1 Manage Customer Contacts.

Process Plug-in enabled Y	**Available Algorithm(s):**	SAAT-CC – Creates a customer contact of the specified Customer Contact Class and Customer Contact Type when the service agreement is activated.

Configuration required Y	**Entities to Configure:**	SA Type
		Customer Contact Class
		Customer Contact Type

4.4 Activate SA Relationship Group: Activation Pending Start/Stop SA
Actor/Role: C2M(CCB)
Description:
The related SA Relationship records are activated in C2M (CCB).

4.5 Request Sub-SA Activation
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User at times may need to initiate manual activation of a Sub Service Agreement in C2M (CCB).

4.6 Activate Sub Service Agreement Group: Analyze SA Relationship
Actor/Role: C2M (CCB)
Description:
Activate related Sub-Service Agreements in C2M (CCB).

Customizable process N	**Process Name:**	ANLYZSAR - Activates Sub-Service Agreements for new activated SA Relationships.

4.7 Initiate Cancel Pending Start SA for Landlord

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Actor/Role: CSR or Authorized User
Description:
After review, the CSR or Authorized User cancels the Pending Start SA for the landlord.

4.8 Cancel Pending Start SA for Landlord Group: Create SA
Actor/Role: C2M(CCB)
Description:
The Pending Start SA for the landlord is canceled in C2M(CCB).

4.9 Cancel Pending Stop SA for Tenant
Actor/Role: C2M(CCB)
Description:
If a Pending Stop SA exists for the tenant it is also canceled in C2M(CCB).

5.0 Search for Customer - Tenant
Actor/Role: CSR or Authorized User
Description:
Upon receipt of request for Start Service, the CSR or Authorized User locates the customer (tenant) 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 for the customer including Pending Starts.

Process Plug-in enabled Y	**Available Algorithm(s):**	C2MPERS-INFO - This Installation algorithm formats the "Person Information" that appears throughout the system.
		C2M-PERNMVAL – This Installation algorithm validates the name for person type entries.
Configuration required Y	**Entities to Configure:**	Installation Options - Framework

5.1 Evaluate Premise to Start
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User reviews the Premise to determine if service can be started for the tenant at this location. Typically, there are business rules and procedures to make this decision for starting service.

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5.2 Determine Impact on Pending Start SA for Tenant
Actor/Role: CSR or Authorized User
Description:
Before any changes or updates are made for a Pending Start SA for a tenant, the CSR or Authorized User reviews how the changes impact the existing Pending Start SA or other related Starts or Stops.

5.3 Evaluate Account for New Tenant
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User reviews the Account to determine if service can be started for the tenant as a customer in C2M(CCB). Typically, there are business rules and procedures to make this decision for starting service.

5.2 Update Pending Start SA for Tenant
Actor/Role: C2M(CCB)
Description:
The Pending Start SA for the tenant is updated in C2M(CCB).

5.4 Request Update Pending Start SA End Date
Actor/Role: CSR or Authorized User
Description:
There is an existing Pending Stop SA for the Premise. Based on a customer request or correction, the CSR or Authorized User determines to update the Pending Start SA. The Pending Stop SA is changed to match the Pending Start SA date.

5.5 Update Pending Stop SA Date
Actor/Role: C2M(CCB)
Description:
The Pending Stop SA for a previous customer is updated in C2M(CCB).

5.6 Change Existing Tenant Pending Stop Date to Match Pending Start Date for New Tenant Group: Landlord Reversion Group: Create SA

Actor/Role: C2M(CCB)

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Description:
When a Pending Start for a landlord exists between tenants and the start date changes for the new tenant, the system will change the Pending Stop Date for the existing tenant to match the Pending Start Date for the new tenant.

Process Plug-in enabled Y	**Available Algorithm(s):**	C2M LL REV - This algorithm causes service to be started under a landlord's account at a service point covered by a landlord agreement
Configuration required Y	**Entities to Configure:**	SA Type

5.7 Update Landlord Pending Start SA with Pending Stop Date to Match Pending Start Date for Tenant Group: Landlord Reversion Group: Create SA

Actor/Role: C2M(CCB)
Description:
There is a Pending Start and a Pending Stop for the landlord. The landlord's Pending Stop SA is updated with the new future dated Pending Start date for the new tenant.

Process Plug-in enabled Y	**Available Algorithm(s):**	C2M LL REV - This algorithm causes service to be started under a landlord's account at a service point covered by a landlord agreement
Configuration required Y	**Entities to Configure:**	SA Type Service Type

5.8 Evaluate Pending Start SA for Tenant
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User reviews the pending start Service Agreement. Prior to Service Agreement activation, it may be determined the Service Agreement needs to be canceled. The Customer (tenant) may call and indicate they are not moving in or taking responsibility for utility charges for the given Premise. They may request to cancel the request to start. The CSR or Authorized User may need to manually start the Service Agreement to expedite Billing or process an anomaly.

5.9 Initiate Cancel for Pending Start SA for New Tenant

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Actor/Role: CSR or Authorized User
Description:
After review, the CSR or Authorized User cancels the Pending Start SA for the new tenant.

6.0 Cancel Pending Start SA for New Tenant
Actor/Role: C2M(CCB)
Description:
The Pending Start SA for the new tenant is canceled in C2M(CCB).

6.1 Activate Service Agreements Group: Activation Pending Start/Stop SA
Actor/Role: C2M(CCB)
Description:
The Service Agreement Activation background process, **SAACT**, periodically checks and selects Service Agreements with a start read and Start Date less than or equal to the current date. This background process then attempts to transition the Service Agreement to Active.
Manual Process: The CSR or Authorized User may transition the Service Agreement to Active as a result of exception processing as shown earlier in this process.
Automated Process: C2M(CCB) will automatically transition the Service Agreement to Active status when all required information is made available.

Customizable process N	**Process Name:**	SAACT - The service agreement activation process updates the status and SA/SP reads for pending start and pending stop service agreements.
Process Plug-in enabled N	**Available Algorithm(s):**	C1-SACR-AT This SA creation algorithm activates a pending start SA at the time of creation and is only applicable for non-service SA Types.
Configuration required Y	**Entities to Configure:**	SA Type Batch Control

6.2 **Create To Do Entry Group: Service Agreement Activation Process**
Actor/Role: C2M(CCB)
Description:
The background process, **SAACT**, Service Agreement Activation, periodically checks to see if Service Agreements can be activated. C2M(CCB) creates an exception processing record for each Service Agreement with the Service Agreement's effective start date less than the current date and with missing or incomplete information. The Service Agreement may also be manually activated. A separate background process creates To Do Entries for Pending Start/Stops that are older than a configured date. To Do Type and To Do Roles must also be configured.

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

C1-ADJAREQEM - Create Email For Adjustment Approval
C1-CAPREMAIL - This algorithm type creates an email outbound message requesting the user to respond to an approval request for the rebate claim linked to the To Do being processed.
C1-CREMAILTD - This algorithm creates an outbound message that sends email related to the To Do Entry being processed.
F1-TDT-INFO - This algorithm formats the "To Do Information" that appears throughout the system. It concatenates the to do fields and delimiters specified as algorithm parameters
C1-VALTDROLE - This algorithm prevents the To Do Role from being changed. This algorithm would typically be used on To Do Types that are used for Adjustment Approval. This ensures that the corresponding Approval Roles are preserved.
F1-VAL-SKILL - This algorithm validates user assignment changes with respect to minimum required skills defined for the To Do and the currently assigned user. Skill validation is performed when a To Do is assigned for the first time to a specific user or when the To Do is reassigned to another user.

Configuration required Y **Entities to Configure:**

To Do Types
To Do Roles
Batch Control

6.3 Evaluate and Perform Analysis

Actor/Role: CSR or Authorized User

Description:

Based on established business rules, the CSR or Authorized User investigates viable solutions or workarounds for the missing or incomplete information related to Service Agreement Activation.

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6.4 Resolve Issue

Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User determines what needs to be done and enters applicable information in C2M(CCB) or MDM.

6.5 Request Complete To Do

Actor/Role: CSR or Authorized User
Description:
If there is an associated 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 issue is resolved. The CSR or Authorized User may add comments or a log entry for future reference.

Configuration required Y **Entities to Configure:**

To Do Role
To Do Type

6.6 Complete To Do

Actor/Role: C2M(CCB)
Description:
The To Do Entry is updated to Complete status in C2M(CCB).

Configuration required Y **Entities to Configure:**

To Do Role
To Do Type

Configuration required Y **Entities to Configure:**

Batch Control

6.7 Analyze Active SA

Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User may review the Active Service Agreement. Information becomes available that requires further evaluation. The Service Agreement may need to be canceled. The customer may call and indicate they are not moving in to the given Premise. The customer (landlord or tenant) may request to cancel the original request after the Service Agreement is activated.

6.8 Evaluate Eligibility for Cancellation

Actor/Role: CSR or Authorized User

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Description:
At times, a Service Agreement requires cancellation. Typically, this occurs when the Service Agreement was created in error. As part of the cancellation process, the CSR or Authorized User determines if any associated financial transactions for the Active Service Agreement require cancellation. All financial transactions (bills, payments or adjustments) must be canceled before a Service Agreement can transition to Canceled status. At times, it is not possible to cancel financial transactions. The Service Agreement must be stopped. Refer to 3.3.6.3 C2M.CCB.Stop Premise Based Service for Landlord - Tenant.

6.9 Request Cancel Adjustment(s) and Update Balance
Actor/Role: CSR or Authorized User
Description:
The CSR or Authorized User cancels applicable adjustment(s) to allow cancellation of the Service Agreement. The Service Agreement balance is updated accordingly.

Configuration required Y **Entities to Configure:** Adjustment Cancel Reason

7.0 Cancel Adjustment(s) and Reflect Changes to Balance
Actor/Role: C2M(CCB)
Description:
The Service Agreement balance is updated in C2M(CCB) to reflect the adjustment cancellation.

Configuration required Y **Entities to Configure:** Adjustment Cancel Reason

7.1 4.2.2 C2M.CCB Manage Bill
Actor/Role: CSR or Authorized User
Description:
Refer to 4.2.2. C2M.CCB Manage Bill for cancellation of Bill Segments. Refer specifically to 4.2.2.2 C2M.CCB-MDM for Manage Meter Charges or 4.2.3.3 C2M.CCB-MDM Manage Item Charges.

7.2 4.3.1.1 C2M.CCB Manage Payments
Actor/Role: CSR or Authorized User
Description:
Refer to 4.3.1.1 C2M.CCB Manage Payments for cancellation of Payments.

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7.3 Initiate Cancel SA

Actor/Role: CSR or Authorized User

Description:

When all financial transactions are canceled, the CSR or Authorized User changes the Service Agreement to Canceled.

7.4 Cancel SA

Actor/Role: C2M(CCB)

Description:

The Service Agreement is transitioned to a canceled status. Canceled is a final status. If configured, a To Do entry can be created when a Service Agreement is canceled.

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

C2M-SACA-CRT – Create To Do Entry when SA Canceled

Configuration required Y **Entities to Configure:**

To Do Type
To Do Role
SA Type

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Test Documentation related to the Current Process

ID	Document Name	Test Type

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Document Control

Change Record

Date	Author	Version	Change Reference
11/16/09	Colleen King	Draft 1a	No Previous Document
10/20/10	Geir Hedman		Update Title and Content page
01/14/11	Zeev Lavee		Update Algorithms Batch and Business modules
2/8/11	Geir Hedman		Update Document and Visio
05/16/13	Cynthia Fisher		Update to v2.4
06/12/13	Galina Polonsky		Reviewed, Approved
09/11/17	Ekta Dua		Updated Document and Visio to v2.6
12/05/17	Colleen King		Updated Document and Visio
12/21/2017	Galina Polonsky		Reviewed, Approved

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Attachments:

Control Central Search

Control Central Search.doc

Dashboard

Dashboard - LL Exists.doc

Admin Menu Installation Options Control Central Alerts

Installation Options Framework Control C

Pending Start-Stop – Landlord - Tenant

Start Stop Landlord - Tenant.doc

Landlord Agreement

Landlord Agreement.doc

Service Agreement

Service Agreement LL Pending Start.doc

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