

## **Oracle Utilities Customer Care and Billing Release 2.4.0**

Utility Reference Model

3.3.2.1 Start Premise Based Service

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Oracle Utilities Customer Care and Billing Utility Reference Model 3.3.2.1, Release 2.4.0

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## 3.3.2.1 Start Premise Based Service

This section provides a description of the Start Premise Based Service business process. This includes:

- ♦ [Brief Description](#)
  - ♦ [Actors/Roles](#)
- ♦ [Business Process Diagrams](#)
  - ♦ [Start Premise Based Service Process Model - Page 1](#)
  - ♦ [Start Premise Based Service Process Model - Page 2](#)
  - ♦ [Start Premise Based Service Process Model - Page 3](#)
- ♦ [Start Premise Based Service Detailed Process Model Description](#)
- ♦ [Installation Options Control Central Alert Algorithms](#)
- ♦ [Related Training](#)

## Brief Description

**Business Process:** 3.3.2.1 CC&B Start Premise Based Service

**Process Type:** Sub-process

**Parent Process:** 3.3.2 Manage Service Agreement

**Sibling Processes:**

- 3.3.2.3 Stop Premise Based Service
- 3.3.2.2 Start Non-Premise Based Service
- 3.3.2.4 Stop Non Premise Based Service
- 3.3.3.2 Determine Customer Deposit
- 3.3.1.1 Establish Person and/or Account
- 3.4.1.1 Manage Customer Contacts
- 5.3.2.1 Manage Field Activities and Field Orders
- 3.4.4.1a Enroll in Budget
- 3.4.4.1b Enroll in Non-Billed Budget
- 4.3.2.1 Manage Collection Process
- 5.1.5.1 Manage Metered Site

This process describes the typical Start Service processing. After receiving a Customer request to Start Service, 5.1.5.1 Manage Metered Site, 3.3.1.1 Establishing Person and/or Account, a Service Agreements is created that determines relationships between the Service Provider and Customer.

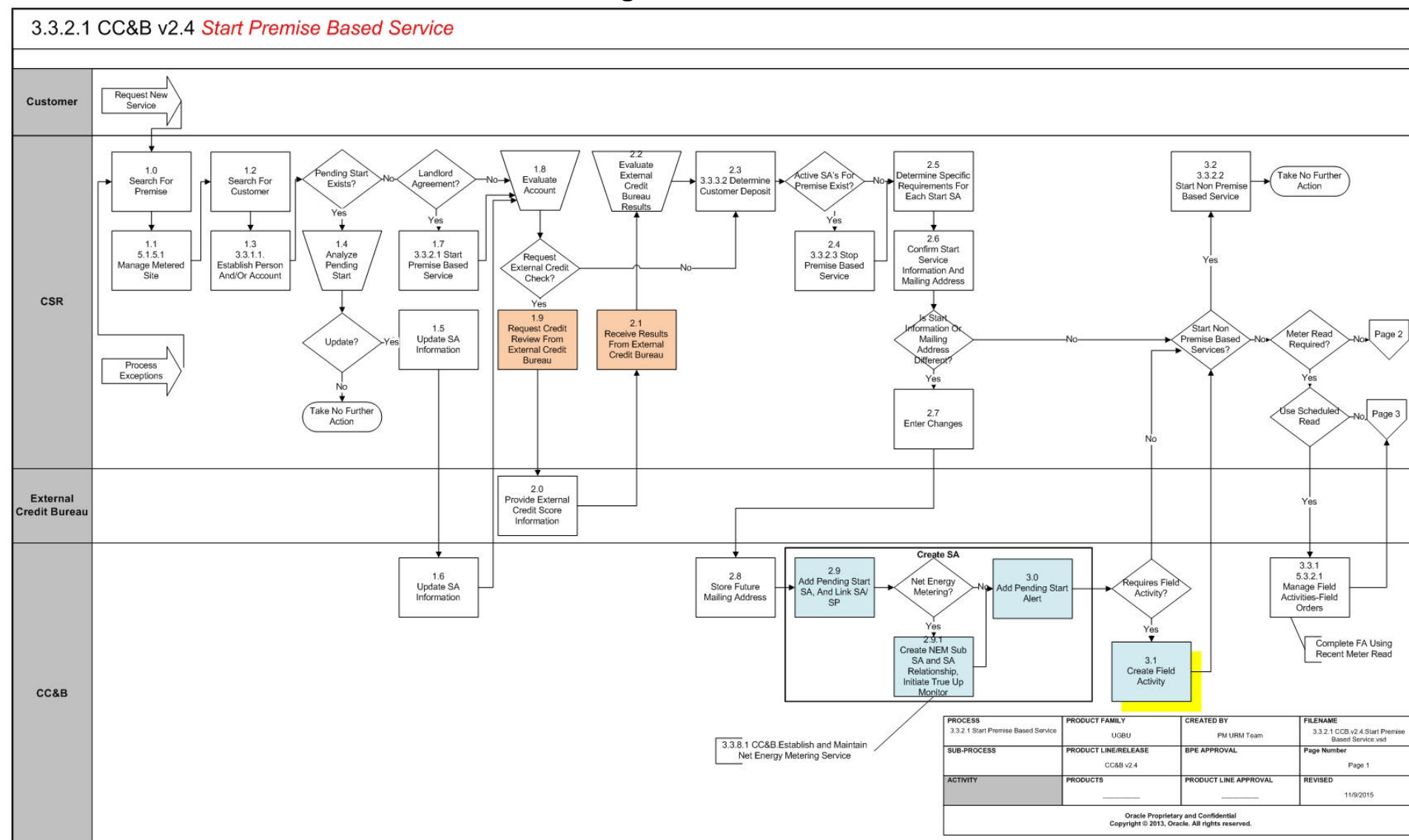
## Actors/Roles

The Start 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

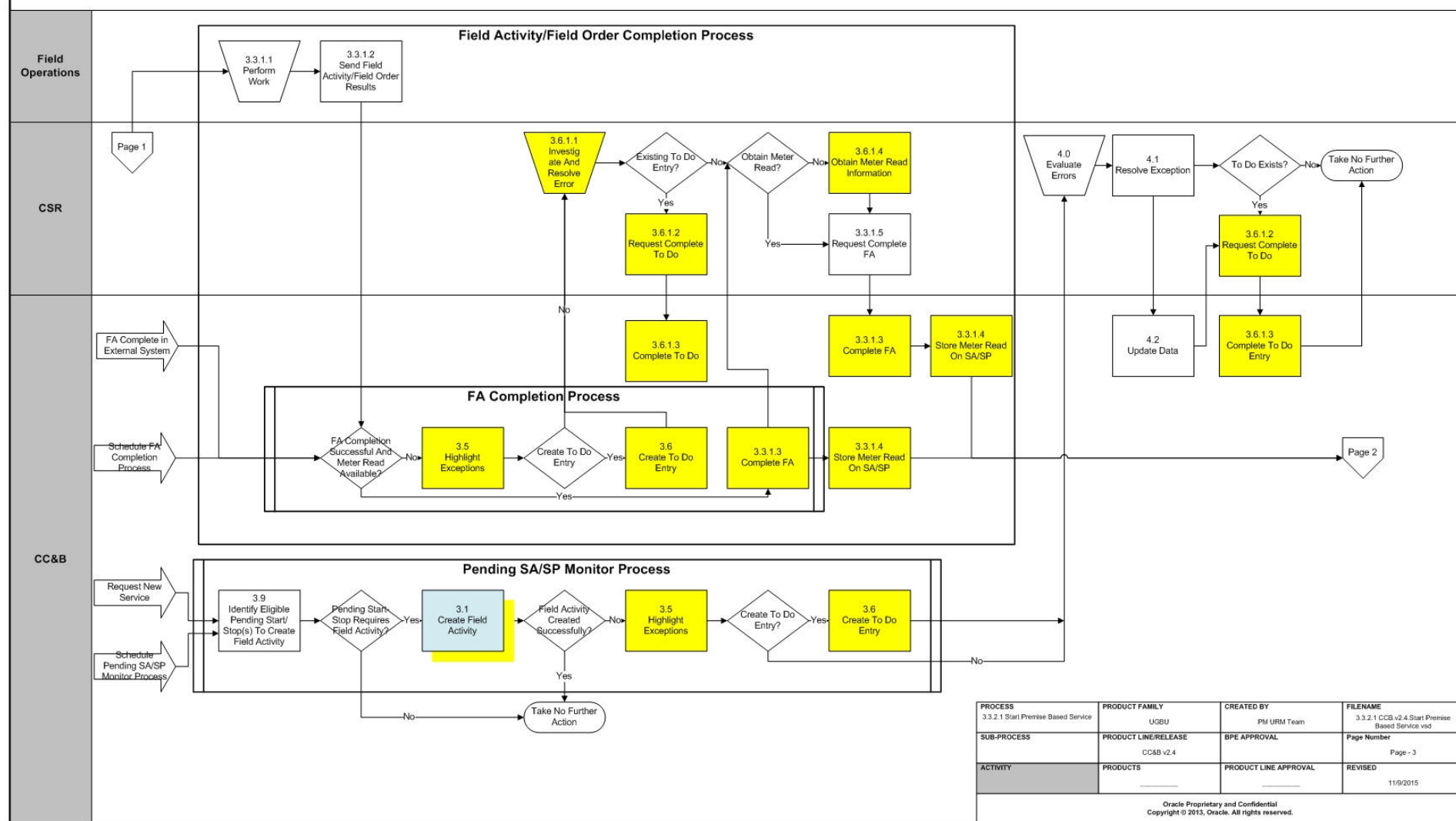
## Start Premise Based Service Process Model - Page 1







## Start Premise Based Service Process Model - Page 3

3.3.2.1 CC&B v2.4 *Start Premise Based Service*

# Start Premise Based Service Detailed Process Model Description

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

- ♦ 1.0 Search for Premise
- ♦ 1.1 5.1.5.1 Manage Metered Site
- ♦ 1.2 Search for Customer
- ♦ 1.3 3.3.1.1 Establish Person and/or Account Process
- ♦ 1.4 Analyze Pending Starts
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- ♦ 2.9 Add Pending Start SA and Link SA/SP
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- ♦ 3.0 Add Pending Start Alert
- ♦ 3.1 Create Field Activity
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- ♦ 3.3 5.3.2.1 Manage Field Activities and Field Orders
- ♦ 3.4 Evaluate Pending Service Start Agreement
- ♦ 3.4.1.1 Initiate Cancel for Pending Start
- ♦ 3.4.1.2 Cancel Pending Start
- ♦ 3.4.1.3 Request Add Customer Contact
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- ♦ 3.4.2.1 Update SA/SP with Read
- ♦ 3.4.2.2 Request Activate SA
- ♦ 3.4.2.3 Update SA and Change Status to Active
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- ♦ 3.4.2.5 Add Bill Cycle
- ♦ 3.5 Highlight Exceptions
- ♦ 3.6 Create To Do Entry
- ♦ 3.6.1.1 Investigate and Resolve Error
- ♦ 3.6.1.2 Request Complete To Do
- ♦ 3.6.1.3 Complete To Do Entry
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- ♦ 3.8.1.2 Initiate Cancel SA
- ♦ 3.8.1.3 Cancel SA
- ♦ 3.8.1.4 Cancel NEM Sub SA and NEM True Up Monitor Service Task
- ♦ 3.8.2.1 3.3.2.3 Stop Premise Based Service
- ♦ 3.3.1.1 Perform Work
- ♦ 3.3.1.2 Send Field Activity/Field Order/ Results
- ♦ 3.3.1.3 Complete FA
- ♦ 3.3.1.4 Store Meter Read on SA/SP
- ♦ 3.3.1.5 Request Complete FA
- ♦ 3.9 Identify Eligible Pending Start/Stops to Create Field Activity

- ♦ 4.0 Evaluate Errors
- ♦ 4.1 Resolve Exception
- ♦ 4.2 Update Data

## 1.0 Search for Premise

**Reference:** [Start 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 premise address in CC&B 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.

### Available Algorithms

- CI\_PREM-INFO - This algorithm formats the “Premise Info” that appears throughout the system. Address 1, City, State, Postal
- Installation Option - Control Central Alert Algorithm ([Installation Options Control Central Alert Algorithms](#))

### Entities to Configure

- Installation Options
- Installation Options-Framework, Algorithms, System Event: Premise Information
- Installation Options-Framework, Algorithms, System Event: Control Central Alert
- Zones

### Business Objects

- C1-UserDisplayAllPremises - User - Display All Premises

## 1.1 5.1.5.1 Manage Metered Site

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

**Actor/Role:** CSR

**Description:** If the Premise is not in the service territory, the CSR or Authorized User refers the caller to appropriate agency and the process stops with no further actions. If the Premise or Service Points need to be created refer to 5.1.5.1 Manage Metered Site.

## 1.2 Search for Customer

**Reference:** [Start 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 Starts.

### Available Algorithms

- CCAL-DECL - This control central alert algorithm highlight Effective Declarations for Account and Premise
- CCAL-WF - This control central alert algorithm Account or Premise linked to Active WF Process.
- C1\_CASH-DF - This control central alert algorithm displays an alert if the current account's cash only score exceeds the cash only threshold on the installation table.
- C1\_LSSL-DF - This control central alert algorithm displays an alert when the account in context is linked to a person has life support/sensitive load information.

- C1-STOP-SA - This control central alert algorithm creates an alert if current account has any stopped service agreements.
- C1\_COLL-DF - This control central alert algorithm highlights Active Collection Processes associated with the account in context.
- C1\_COLLRF-DF - This control central alert algorithm displays an alert if the current account has an active collection agency referral.
- CI\_CCAL-TD - This control central alert algorithm highlight open To Do Entries for the account in current context.
- C1-CCAL-CASE - This control central alert algorithm highlights cases associated with the person, account and premise in context that are currently in a status marked as 'display alert'.
- C1-GLBL-CTXT - This global context algorithm is responsible to complete missing global context values based on values of other context fields.

#### Entities to Configure

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

### 1.3 3.3.1.1 Establish Person and/or Account Process

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

**Actor/Role:** CSR - CC&B

**Description:** Refer to process 3.3.1.1 Establish Person and/or Account Process.

### 1.4 Analyze Pending Starts

**Reference:** [Start 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 reviews the existing Pending Start to determine if updates are required.

### 1.5 Update SA Information

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

**Actor/Role:** CSR

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

### 1.6 Update SA Information

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

**Actor/Role:** CC&B

**Description:** CC&B performs required updates in pending Start Service Agreement records. Refer to CC&B integration for more details.

**Available Algorithms**

- C1-SAI-INFO - This Installation algorithm formats the "SA Information" that appears throughout the system.
- CI\_SWTCH\_SVC - This algorithm create a SA and possibly a SP when a package is selected.
- C1-SAT-INFO - This SA Type SA Information algorithm formats the "SA Information" that appears throughout the system.
- C1-SACR-AT - This SA creation algorithm activates a pending start SA.
- NEW SA TODO - This SA creation algorithm creates a To Do entry when a SA is added.
- SACR-WP - This SA creation algorithm creates a workflow process for SA being created.
- CI\_CREATEPPB - This SA creation algorithm creates prepay biller.
- CI\_SATSARNBD - This SA creation algorithm creates SA Relationship and Sub SA for Net Energy Metering - No Bill Determinants Required.
- CI\_SATSARBD - This SA creation algorithm creates SA Relationship and Sub SA for Net Energy Metering - Bill Determinants Required.
- CI\_SATTUMN6 - This SA creation algorithm creates True Up Monitor of Type N6 for Sub SA.
- C1-TRANSFASA (CC&B and MDM integration) - Transition Related FA From SA Sync.

**Entities to Configure**

- Installation Options-Framework
- SA Type
- SA Type SA Rel Type
- SA Relationship Type

**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

### 1.7 3.3.6.2 Start Premise Based Service for Landlord-Tenant

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

**Actor/Role:** CSR - CC&B

**Description:** Refer to 3.3.6.2 Start Premise Based Service for Landlord-Tenant.

### 1.8 Evaluate Account

**Reference:** [Start 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 evaluates the account. Typically Account Financial History, Billing History, and Account Credit and Collection History are reviewed.

### 1.9 Request Credit Review from External Credit Bureau

**Reference:** [Start 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 determines further information is needed and performs an external credit check. An external review is conducted. CC&B has functionality to interface with Credit Agencies. This is a complete custom process. The information is returned to CC&B.

**Process Name**

- Credit Bureau Interface - 100% Custom Process

### 2.0 Provide External Credit Score Information

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

**Actor/Role:** External Credit Bureau

**Description:** The External Credit Bureau collects and provides the required external credit score information.

**Process Name**

- Credit Bureau Interface - 100% Custom Process

## 2.1 Receive Results from External Credit Bureau

**Reference:** [Start 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 receives the credit information from the External Credit Bureau. This is a complete custom process.

**Process Name**

- Credit Bureau Interface - 100% Custom Process

## 2.2 Evaluate Results from External Credit Bureau

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

**Actor/Role:** CSR

**Description:** Based on established business rules the CSR or Authorized User reviews the credit information to determine the overall credit risk for the Company.

**Process Name**

- Credit Bureau Interface - 100% Custom Process

## 2.3 3.3.3.2 Determine Customer Deposit

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

**Actor/Role:** CSR - CC&B

**Description:** A Customer Deposit may be required. Refer to 3.3.3.2 Determine Customer Deposit.

## 2.4 3.3.2.3 Stop Premise Based Service

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

**Actor/Role:** CSR - CC&B

**Description:** There may be Active SA's. Refer to 3.3.2.3 Stop Premise Based Service.

## 2.5 Determine Specific Requirements for Each Start SA

**Reference:** [Start 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 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.

**Note:** If service about to be started assumes that customer will have NetMetering additional information is required to be populated (e.g. The NEM Master SA Type for Distributed Generation Service). Also Organization



decides how often the “Distributed Generation” customers true up their actual monthly energy charges/ generation credits.

#### **Available Algorithms**

- C1-SAT-INFO - This SA Type SA Information algorithm formats the “SA Information” that appears throughout the system.
- C1-SAI-INFO - This Installation algorithm formats the “SA Information” that appears throughout the system.
- C1-SACR-AT - This SA creation algorithm activates a pending start SA.
- NEW SA TODO - This SA creation algorithm creates a To Do entry when a SA is added.
- SACR-WP - This SA creation algorithm creates a workflow process for SA being created.
- CI\_CREATEPPB - This SA creation algorithm creates prepay biller.

#### **Entities to Configure**

- General Ledger Division
- CIS Division
- Service Type
- SA Type
- SA Type Start Options
- SP Type
- Rate Schedule
- Contract Quantity Type
- Contract Options Type
- Contract Option Event Type
- To Do Type
- To Do Role
- Adjustment Type
- Currency
- Billable Charge Template
- Bill Factor
- Characteristic Type
- Interval Profile Rel type
- TOU Map Relationship Type
- TOU Group
- Terms and Conditions

#### **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-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-PPBSA - This business object is used to retrieve details for a prepaid biller's (PPB) service agreement.
- C1-SABasic - Service Agreement Basic

- 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.

## 2.6 Confirm Start Service Information and Mailing Address

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

**Actor/Role:** CSR

**Description:** There is dialogue with the Customer. Start Information is confirmed including mailing address.

## 2.7 Enter Changes

**Reference:** [Start 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 enters new mailing address or other information. The system defaults to mailing premise. The CSR or Authorized User can change the default. CC&B address sources include Person, Premise, and Account. The address information is effective when the Service Agreement is activated.

### Entities to Configure

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

## 2.8 Store Future Mailing Address

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

**Actor/Role:** CC&B

**Description:** The mailing address information is stored until the Service Agreement is activated.

## 2.9 Add Pending Start SA and Link SA/SP

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

**Group:** Create SA

**Actor/Role:** CC&B

**Description:** CC&B creates a Service Agreement in Pending Start status. Through Start Service Initiation CC&B creates a Service Agreement in pending status and links Service Point information to the Service Agreement.

**Available Algorithms**

- CI\_SWITCH\_SVC - This algorithm create a SA and possibly a SP when a package is selected.
- C1-SACR-AT - This SA creation algorithm activates a pending start SA.
- NEW SA TODO - This SA creation algorithm creates a To Do entry when a SA is added.
- SACR-WP - This SA creation algorithm creates a workflow process for SA being created.
- CI\_CREATEPPB - This SA creation algorithm creates prepay biller.

**Entities to Configure**

- To Do Type
- To Do Role
- SA Type

## 2.9.1 Create NEM Sub SA and SA Relationship, Initiate True Up Monitor

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

**Actor/Role:** CC&B

**Description:** Start Premise Based Service process set up a Master SA for the “Distributed Generation” customer. When the Master SA is setup in the system, a NEM Sub SA and SA Relationship is also created as well as the True Up Monitor. A characteristic is added on the Sub SA to link the True Up Monitor Service Task ID. (See 3.3.8.1 CC&B.Establish and Maintain Net Metering Energy Metering Service for details)

**Available Algorithms**

- C1-SAT-SARL - This algorithm creates an SA Relationship record as well as the Sub SA.
- CI\_SATSARNBD - This SA creation algorithm creates SA Relationship and Sub SA for Net Energy Metering - No Bill Determinants Required.
- CI\_SATSARBD - This SA creation algorithm creates SA Relationship and Sub SA for Net Energy Metering - Bill Determinants Required.
- C1-SAT-TUM - Creates True Up Monitor For Sub SA.
- CI\_SATTUMN6 - This algorithm creates a true up monitor.

**Business Object**

- C1-NEMTrueUpTask
- C1-NEMTrueUpTaskType

**Entities to Configure**

- SA Type
- SA Relationship Type
- Service Task Type
- Characteristic Type

## 3.0 Add Pending Start Alert

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

**Group:** Add Pending Start Alert

**Actor/Role:** CC&B

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

**Available Algorithms**

- C1\_PENDST-DF - Highlight Pending Start SA's

**Entities to Configure**

- Installation Options

## 3.1 Create Field Activity

**Reference:** [Start 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 start Field Activity may be created if configured and is required. CC&B links the Start 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. Please refer CC&B Integration and Field Management Software documents for details if fieldwork is managed outside of CC&B.

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

**Available Algorithms**

- CI\_SASPFWCRCRE - 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.
- SSFW-INTV MR - 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.
- F1-GCHG-CDPCP (CC&B - Field Management Software Integration) - Generic Change Data Capture
- C1-CAPFASSI (CC&B - Field Management Software Integration) - Capture FA-Based Initial Snapshot
- C1-CAPFASSF (CC&B - Field Management Software Integration) - Capture FA Final Snapshot
- F1-COMPSNAPS (CC&B - Field Management Software Integration) - Compares Initial and Final Snapshots
- C1-ADDLFAINF (CC&B - Field Management Software Integration) - Capture Additional FA Information
- C1-TRANSFASP (CC&B - Field Management Software Integration) - Transition Related FA From SP Sync
- C1-TRANSFASA (CC&B - Field Management Software Integration) - Transition Related FA From SA Sync
- C1-FASYNCELG (CC&B - Field Management Software Integration) - Check FA Sync Eligibility
- C1-FA-PDTSY (CC&B - Field Management Software Integration) - Check If Related Non-Final Syncs Exist for the FA
- C1-GETGEOLL (CC&B - Field Management Software Integration) - Retrieve Latitude/ Longitude Geographic Value

**Entities to Configure**

- To Do Type
- To Do Role
- Field Activity Type

- Field Activity Type Profile
- Operations Area
- Dispatch Group
- Field Service Class
- Field Service Control

#### Business Object

- 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
- C1-FASyncReqOutMsg - FA Sync Request Outbound Message
- C1-ServiceRequestOutMsg - Service Request Overview Outbound Message
- C1-DeviceOverviewOutMsg - Device Overview Outbound Message
- C1-DeviceConfigOutMsg - Device Configuration Outbound Message
- C1-FAInfoOutMsg - C1-FAInfoOutMsg
- C1-MDM2SPSyncRequest - MDM2 SP Sync Request
- C1-MDM2SASyncRequest - MDM2 SA Sync Request
- C1-SPLatitudeLongitude - Service Point - Latitude/Longitude
- C1-PremiseLatitudeLongitude - Premise - Latitude/Longitude

### 3.2 3.3.2.2 Start Non-Premise Based Service

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

**Actor/Role:** CSR - CC&B

**Description:** Refer to 3.3.2.2 Start Non-Premise Based Service.

### 3.3 5.3.2.1 Manage Field Activities and Field Orders

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

**Actor/Role:** CSR - CC&B

**Description:** Refer to 5.3.2.1 Manage Field Activities and Field Orders.

**Note:** 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.

## 3.4 Evaluate Pending Service Start Agreement

**Reference:** [Start 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 start Service Agreement. Prior to Service Agreement activation, it may be determined the Service Agreement needs to be canceled. The Customer may call and indicate they are not moving in to the given Premise. They may request to cancel the request to start.

### 3.4.1.1 Initiate Cancel for Pending Start

**Reference:** [Start 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 Start Service Agreement.

### 3.4.1.2 Cancel Pending Start

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

**Actor/Role:** CC&B

**Description:** The Pending Start Service Agreement transaction is removed from CC&B. Any Pending Reciprocal Stop may also be removed.

### 3.4.1.3 Request Add Customer Contact

**Reference:** [Start 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 creates a Customer Contact for the customer, recording pertinent information about the changes to the Service Agreement. Refer to process 3.4.1.1 Manage Customer Contacts.

#### 3.4.1.3.1 Add Customer Contact

**Reference:** [Start 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 can create a Customer Contact online based on established business rules. The Customer Contact is added in CC&B. CC&B 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.

**Entities to Configure**

- Installation Options
- Customer Contact Class
- Customer Contact Type

### 3.4.2.1 Update SA/SP with Read

**Reference:** [Start 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 start date and updates the Service Agreement/Service Point Link with an associated Meter Read for the effective start date.

Refer to section 4.2.1.1a Read Meter for further details.

### 3.4.2.2 Request Activate SA

**Reference:** [Start 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 activates the Service Agreement in CC&B.

### 3.4.2.3 Update SA and Change Status to Active

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

**Group:** Service Agreement Activation Process

**Actor/Role:** CC&B

**Description:** The Service Agreement status is transitioned to active in CC&B.

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

**Process Name**

- SAACT - SA Activation - activates and stops Service Agreements when all required information is available.

### 3.4.2.4 Add Customer Contact

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

**Group:** Service Agreement Activation Process

**Actor/Role:** CC&B

**Description:** The Customer Contact is added in CC&B. If configured, CC&B can automatically create a Customer Contact when Service Agreements are activated. CC&B 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.

**Available Algorithms**

- CI\_SAACT-NB - SA Type - SA Activation - This algorithm creates a customer contact of the specified Customer Contact Class and Customer Contact Type when the non-billed budget service agreement is activated.

**Process Name**

- SAACT - SA Activation - activates and stops Service Agreements when all required information is available.

**Entities to Configure**

- SA Type
- Installation Options
- Customer Contact Class
- Customer Contact Type

**3.4.2.5 Add Bill Cycle**

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

**Group:** Service Agreement Activation Process

**Actor/Role:** CC&B

**Description:** The Bill Cycle is added in CC&B. If that account does not have a bill cycle or account's bill cycle is not protected, the bill cycle will be changed to reflect the service point's service cycle or assign bill cycle as specified on the SA activation algorithm.

- **Manual Process:** The CSR or Authorized User can add or update bill cycle on the account based on established business rules.
- **Automated Process:** Based on configuration and service point's service cycle, a bill cycle can be assigned automatically.

**Available Algorithms**

- **CI\_ASSIGNNBC** - This algorithm type assigns a bill cycle to an account if that account does not have a bill cycle.

**Process Name**

- **SAACT** - SA Activation - activates and stops Service Agreements when all required information is available.

**Entities to Configure**

- SA Type
- Installation Options
- Customer Contact Class
- Customer Contact Type
- Bill Cycle
- Service Cycle

**3.5 Highlight Exceptions**

**Reference:** [Start 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:** The background process, SAACT, Service Agreement Activation, periodically checks to see if 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. 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.



**Process Name**

- 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.

**Entities to Configure**

- To Do Types
- To Do Roles

## 3.6 Create To Do Entry

**Reference:** [Start 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.

**Process Name**

- 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 unfulfilled start/stop requests gone.

**Entities to Configure**

- To Do Types
- To Do Roles

### 3.6.1.1 Investigate and Resolve Error

**Reference:** [Start 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 the missing or incomplete information related to Service Agreement Activation or Field Activity Completion. The CSR or Authorized User enters this information in CC&B.

### 3.6.1.2 Request Complete To Do

**Reference:** [Start 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 Role
- To Do Type

### 3.6.1.3 Complete To Do Entry

**Reference:** [Start 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 Role
- To Do Type

### 3.6.1.4 Obtain Meter Read Information

**Reference:** [Start 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.

## 3.7 Analyze Active SA

**Reference:** [Start 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 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 may request to cancel the original request after the Service Agreement is activated.

## 3.8 Evaluate Cancellation

**Reference:** [Start 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, the CSR or Authorized User determines if any financial transactions are associated with the Active Service Agreement.

### 3.8.1.1 4.2.2.2 Manage Meter Charges and 4.3.1.1 Manage Payments

**Reference:** [Start 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 Manage Meter Charges and 4.3.1.1 Manage Payments.

**Entities to Configure**

- Cancel Reason- for Bill
- Payment or Adjustment

### 3.8.1.2 Initiate Cancel SA

**Reference:** [Start 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.

### 3.8.1.3 Cancel SA

**Reference:** [Start 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. If configured, a To Do entry can be created when a Service Agreement is canceled.

**Available Algorithms**

- SACA-CRTODO - Create To Do Entry when SA Canceled

**Entities to Configure**

- To Do Type
- To Do Role

### 3.8.1.4 Cancel NEM Sub SA and NEM True Up Monitor Service Task

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

**Actor/Role:** CC&B

**Description:** Cancellation of NEM Master SA causes cancellation of NEM Sub SA. Application cancels associated Active True Up Monitor when the NEM Sub SA is canceled or deleted or the SA's Stop Date is before the relevant SA Relationship's Effective Date. See 3.3.8.1 CC&B.Establish and Maintain Net Metering Energy Metering Service for details.

**Available Algorithms**

- C1-CNC-TUM - This algorithm cancels active true up monitors.

**Business Object**

- C1-NEMTrueUpTask
- C1-NEMTrueUpTaskType

**Entities to Configure**

- SA Type
- Service Task Type
- Characteristic Type

**3.8.2.1 3.3.2.3 Stop Premise Based Service**

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

**Actor/Role:** CSR - CC&B

**Description:** The Financial Transactions cannot be canceled. Refer to 3.3.2.3 Stop Premise Based Service.

**3.3.1.1 Perform Work**

**Reference:** [Start 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:** Field Operations

**Description:** A technician is dispatched to the field to obtain read, and/or connect, or perform 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.

**3.3.1.2 Send Field Activity/Field Order/ Results**

**Reference:** [Start 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:** Field Operations

**Description:** The Field Operations office communicates and returns the Field Activity/Field Order results. Refer to:

- 5.3.2.1 Manage Field Activities and Field Orders
- 4.2.1.1a Read Meters
- 4.2.1.2a Load Meter Reads

**3.3.1.3 Complete FA**

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

**Group:**

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

**Actor/Role:** CC&B

**Description:** Application completes FA. 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 Manage Field Activities and Field Orders.

#### Available Algorithms

- C1-FAIN-INFO- Installation algorithm Field Activity Information
- C1-FAAD-INFO - Installation algorithm Field Activity Additional Information
- OFSDGRP DFLT - FA Type Dispatch Group Criteria - Gets the default dispatch group from FS control.
- C1-FACCHARGE - Field Activity Completion - Applies charges by creating an adjustment.
- FACMPL-FLATC - This algorithm levies a flat charge.
- C1-CREOBJFAC - This algorithm type creates a new object when a field activity is completed.

#### Process Name

- 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

### 3.3.1.4 Store Meter Read on SA/SP

**Reference:** [Start 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 meter read associated with the Start Service Agreement is stored in CC&B and available for the background process, Service Agreement Activation, to activate the Service Agreement. This read is now linked to the SA/SP.

- **Manual Process:** The CSR or Authorized User uses this meter read information entered to manually complete the Field Activity.
- **Automated Process:** CC&B links the read to the Service Point associated with the newly activated Service Agreement.

#### Process Name

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

### 3.3.1.5 Request Complete FA

**Reference:** [Start 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 CSR or Authorized User manually completes the Field Activity using the meter read information.

## 3.9 Identify Eligible Pending Start/Stops to Create Field Activity

**Reference:** [Start 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 Name**

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

## 4.0 Evaluate Errors

**Reference:** [Start 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.

## 4.1 Resolve Exception

**Reference:** [Start 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 in CC&B to resolve the exception. This may include creating a Field Activity, or updating a Meter record, Service Point record, or SP Meter/Item History records.

## 4.2 Update Data

**Reference:** [Start 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 WFACCTX	Display Active WF for Account Based on Context
CCAL WFPREMX	Display Active WF for Premise Based on Context
C1_CCAL-TD	Highlight Outstanding To Do Entries
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

## Related Training

Following User Productivity Kit (UPK ) training modules are available for the Start Non-Premise Based Service Utility Reference Model (URM):

- 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