

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

Utility Reference Model

3.3.6.2 Start Premise Based Service for Landlord-Tenant

December 2015

Oracle Utilities Customer Care and Billing Utility Reference Model 3.3.6.2, Release 2.4.0

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## 3.3.6.2 Start Premise Based Service for Landlord-Tenant

This section provides a description of the “Start Premise Based Service for Landlord-Tenant” business process, including:

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

**Business Process:** 3.3.6.2 Start Premise Based Service for Landlord - Tenant

**Process Type:** Sub-Process

**Parent Process:** 3.3.2 Manage Service Agreement

**Sibling Processes:**

- 3.3.2.1 Start Premise Based Service
- 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
- 3.3.6.3 Stop Premise Based Service for Landlord - Tenant
- 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 Enrollment in Budget
- 3.4.4.1b Enrollment in Non-Billed Budget
- 4.3.2.1 Manage Collection Process
- 5.1.5.1 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 Agreements 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.

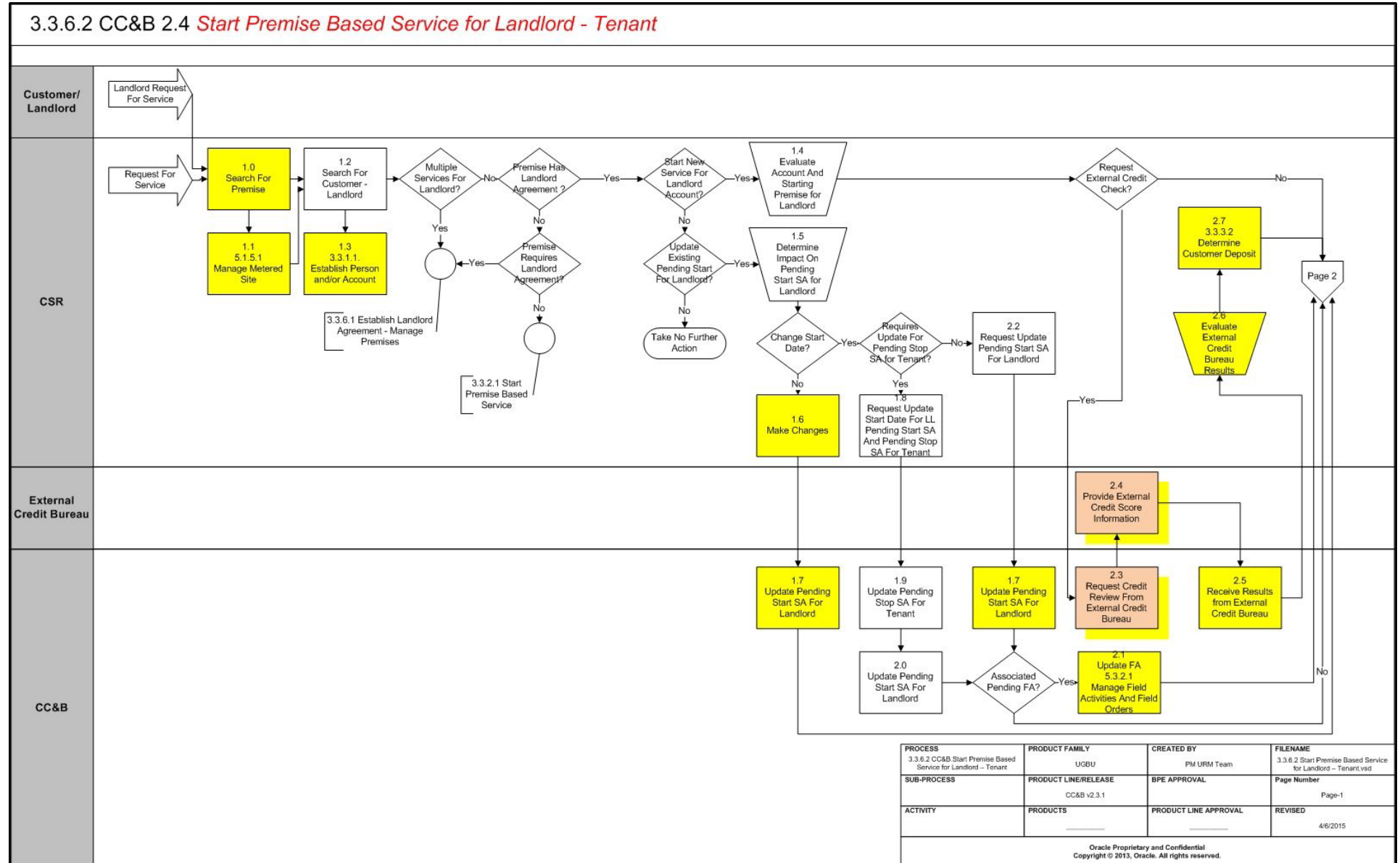
## Actors/Roles

The Start Premise Based Service for Landlord-Tenant 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.
- **CC&B:** CSR or Authorized User of the Customer Care and Billing application.
- **Field Operations:** Company or department that provides operational support, coordinates and performs field work (installation, repair, maintenance, investigations etc. that allows Utilities to provide services to customers).

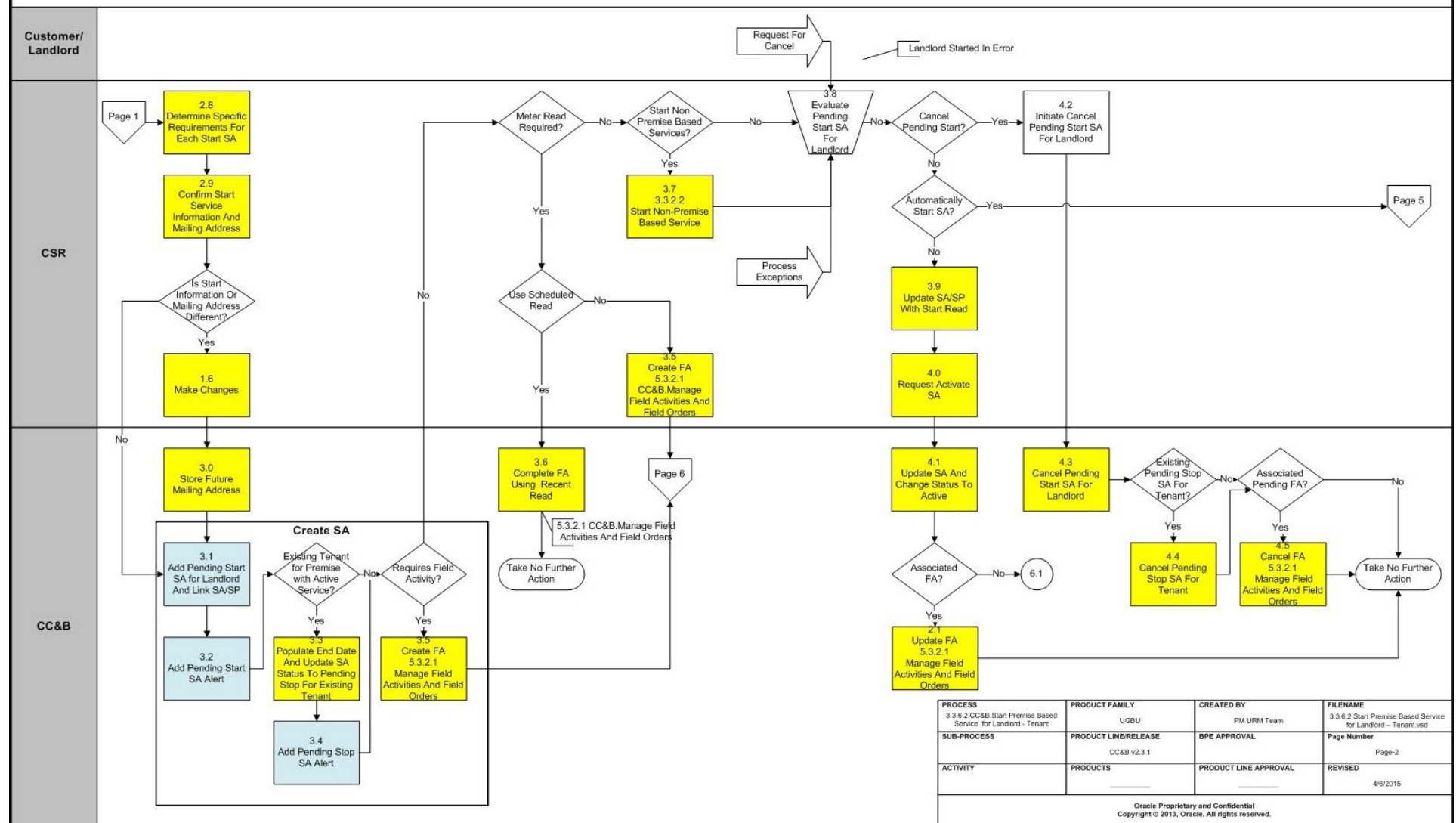
# Business Process Diagrams

## Start Premise Based Service for Landlord-Tenant Process Model - Page 1



## Start Premise Based Service for Landlord-Tenant Process Model - Page 2

### 3.3.6.2 CC&B v2.4 *Start Premise Based Service for Landlord - Tenant*



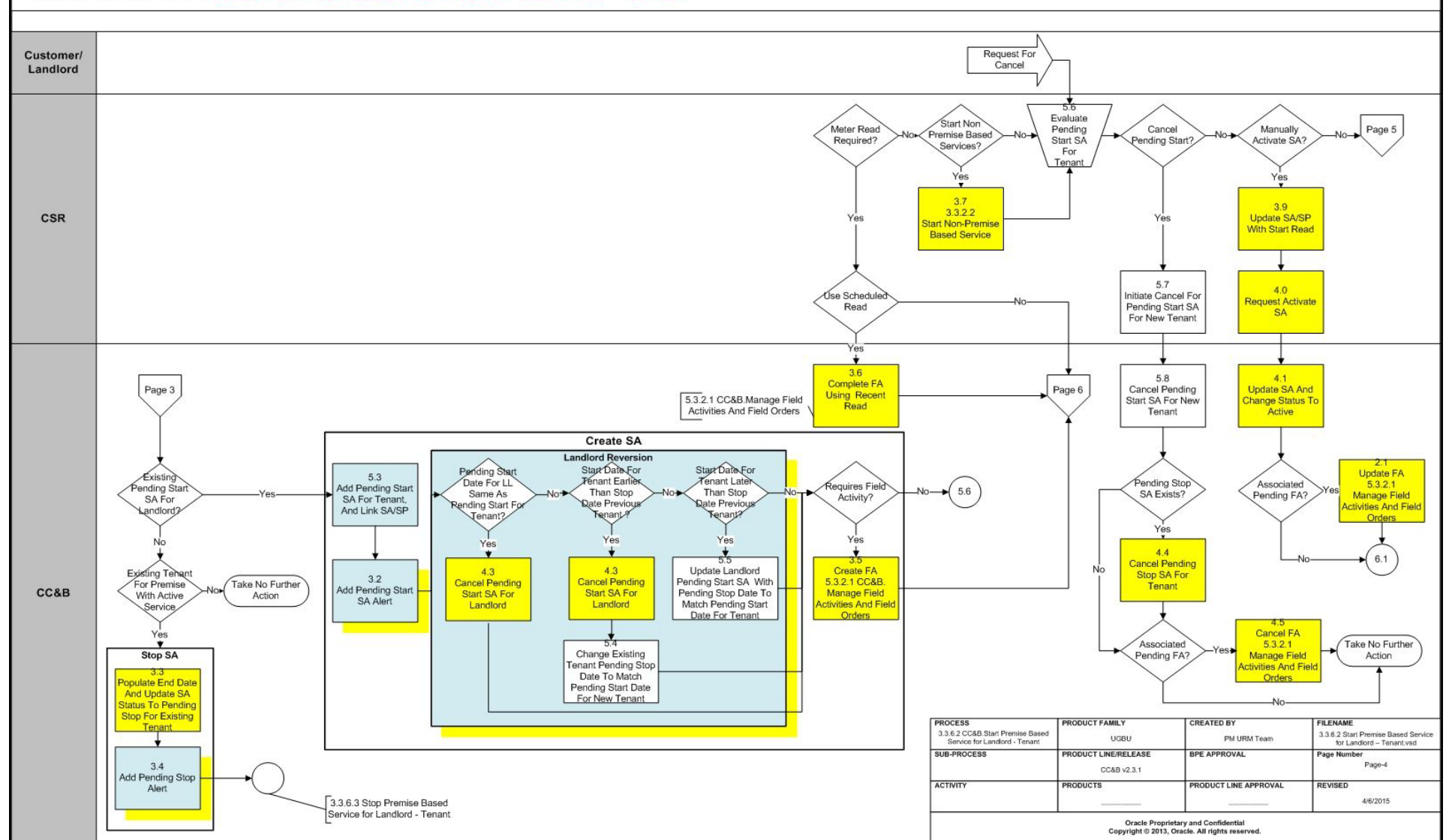


### 3.3.6.2 CC&B v2.4 *Start Premise Based Service for Landlord - Tenant*



# Start Premise Based Service for Landlord-Tenant Process Model - Page 4

## 3.3.6.2 CC&B v2.4 *Start Premise Based Service for Landlord - Tenant*



**Service Agreement Activation Process**

```

graph TD
    Start([6.0.1.1 Investigate and Resolve Error]) --> Meter{Meter Read Available?}
    Meter -- Yes --> 4.0[4.0 Request Activate SA]
    Meter -- No --> 6.0.1.2[6.0.1.2 Obtain Meter Read Information]
    4.0 --> 4.1[4.1 Update SA And Change Status to Active]
    6.0.1.2 --> 6.0.1.3[6.0.1.3 Request Complete To Do]
    4.1 --> 6.0.1.4[6.0.1.4 Complete To Do]
    6.0.1.3 --> 6.0.1.4
    6.0.1.4 --> 6.1[6.1 Analyze Active SA]
    6.1 --> CancelSA{Cancel SA?}
    CancelSA -- Yes --> 6.2[6.2 Evaluate Eligibility For Cancellation]
    CancelSA -- No --> 6.5[6.5 Cancel Bill Segment 4.2.2 Manage Bill]
    6.2 --> 6.3[6.3 Request Cancel Adjustment(s) And Update Balance]
    6.3 --> 6.4[6.4 Cancel Adjustment(s) and Reflect Changes to Balance]
    6.4 --> 6.9[6.9 Cancel SA]
    6.5 --> 6.6[6.6 Stop Premise Based Service For Landlord - Tenant]
    6.6 --> 6.7[6.7 Cancel Payment 4.3.1.1 Manage Payments]
    6.7 --> 6.9
    6.9 --> End([Take No Further Action])
    RequestCancel[Request For Cancel] --> 6.1
    ScheduleService[Schedule Service Agreement Activation Process] --> 5.9[5.9 Identify Pending Start Service Agreements Ready for Activation]
    5.9 --> StartDate{Start Date <= Current Date And Read Exists?}
    StartDate -- Yes --> 6.0[6.0 Highlight Exceptions]
    StartDate -- No --> 6.0.2.1[6.0.2.1 Create To Do Entry]
    6.0 --> 6.0.2.1
    6.0.2.1 --> 4.1
    4.1 --> 6.0.2.2[6.0.2.2 Add Customer Contact 3.4.1.1 Manage Customer Contact]
    6.0.2.2 --> 6.1
    6.0.2.1 --> 6.1
    6.1 --> 6.0.1.1
  
```

**Service Agreement Activation Process**

Page 2

Page 4

3.5.1.4

Schedule Service Agreement Activation Process

5.9 Identify Pending Start Service Agreements Ready for Activation

Start Date <= Current Date And Read Exists?

6.0 Highlight Exceptions

6.0.2.1 Create To Do Entry

4.1 Update SA And Change Status To Active

6.0.2.2 Add Customer Contact 3.4.1.1 Manage Customer Contact

6.1 Analyze Active SA

Cancel SA?

6.2 Evaluate Eligibility For Cancellation

6.3 Request Cancel Adjustment(s) And Update Balance

6.4 Cancel Adjustment(s) and Reflect Changes to Balance

6.5 Cancel Bill Segment 4.2.2 Manage Bill

6.6 Stop Premise Based Service For Landlord - Tenant

6.7 Cancel Payment 4.3.1.1 Manage Payments

6.9 Cancel SA

Take No Further Action

Request For Cancel

6.0.1.1 Investigate and Resolve Error

Meter Read Available?

6.0.1.2 Obtain Meter Read Information

4.0 Request Activate SA

6.0.1.3 Request Complete To Do

6.0.1.4 Complete To Do

4.1 Update SA And Change Status to Active

6.2.1.1 Investigate and Resolve Error

6.2.1.2 Obtain Meter Read Information

6.2.1.3 Request Complete To Do

6.2.1.4 Complete To Do

6.2.1.5 Request Cancel Adjustment(s) And Update Balance

6.2.1.6 Cancel Adjustment(s) and Reflect Changes to Balance

6.2.1.7 Cancel Bill Segment 4.2.2 Manage Bill

6.2.1.8 Stop Premise Based Service For Landlord - Tenant

6.2.1.9 Cancel Payment 4.3.1.1 Manage Payments

6.2.1.10 Cancel SA

6.2.1.11 Take No Further Action

6.2.1.12 Request For Cancel

6.2.1.13 Schedule Service Agreement Activation Process

6.2.1.14 Identify Pending Start Service Agreements Ready for Activation

6.2.1.15 Start Date <= Current Date And Read Exists?

6.2.1.16 Highlight Exceptions

6.2.1.17 Create To Do Entry

6.2.1.18 Update SA And Change Status To Active

6.2.1.19 Add Customer Contact 3.4.1.1 Manage Customer Contact

6.2.1.20 Analyze Active SA

6.2.1.21 Cancel SA?

6.2.1.22 Evaluate Eligibility For Cancellation

6.2.1.23 Request Cancel Adjustment(s) And Update Balance

6.2.1.24 Cancel Adjustment(s) and Reflect Changes to Balance

6.2.1.25 Cancel Bill Segment 4.2.2 Manage Bill

6.2.1.26 Stop Premise Based Service For Landlord - Tenant

6.2.1.27 Cancel Payment 4.3.1.1 Manage Payments

6.2.1.28 Cancel SA

6.2.1.29 Take No Further Action

6.2.1.30 Request For Cancel

6.2.1.31 Schedule Service Agreement Activation Process

6.2.1.32 Identify Pending Start Service Agreements Ready for Activation

6.2.1.33 Start Date <= Current Date And Read Exists?

6.2.1.34 Highlight Exceptions

6.2.1.35 Create To Do Entry

6.2.1.36 Update SA And Change Status To Active

6.2.1.37 Add Customer Contact 3.4.1.1 Manage Customer Contact

6.2.1.38 Analyze Active SA

6.2.1.39 Cancel SA?

6.2.1.40 Evaluate Eligibility For Cancellation

6.2.1.41 Request Cancel Adjustment(s) And Update Balance

6.2.1.42 Cancel Adjustment(s) and Reflect Changes to Balance

6.2.1.43 Cancel Bill Segment 4.2.2 Manage Bill

6.2.1.44 Stop Premise Based Service For Landlord - Tenant

6.2.1.45 Cancel Payment 4.3.1.1 Manage Payments

6.2.1.46 Cancel SA

6.2.1.47 Take No Further Action

6.2.1.48 Request For Cancel

6.2.1.49 Schedule Service Agreement Activation Process

6.2.1.50 Identify Pending Start Service Agreements Ready for Activation

6.2.1.51 Start Date <= Current Date And Read Exists?

6.2.1.52 Highlight Exceptions

6.2.1.53 Create To Do Entry

6.2.1.54 Update SA And Change Status To Active

6.2.1.55 Add Customer Contact 3.4.1.1 Manage Customer Contact

6.2.1.56 Analyze Active SA

6.2.1.57 Cancel SA?

6.2.1.58 Evaluate Eligibility For Cancellation

6.2.1.59 Request Cancel Adjustment(s) And Update Balance

6.2.1.60 Cancel Adjustment(s) and Reflect Changes to Balance

6.2.1.61 Cancel Bill Segment 4.2.2 Manage Bill

6.2.1.62 Stop Premise Based Service For Landlord - Tenant

6.2.1.63 Cancel Payment 4.3.1.1 Manage Payments

6.2.1.64 Cancel SA

6.2.1.65 Take No Further Action

6.2.1.66 Request For Cancel

6.2.1.67 Schedule Service Agreement Activation Process

6.2.1.68 Identify Pending Start Service Agreements Ready for Activation

6.2.1.69 Start Date <= Current Date And Read Exists?

6.2.1.70 Highlight Exceptions

6.2.1.71 Create To Do Entry

6.2.1.72 Update SA And Change Status To Active

6.2.1.73 Add Customer Contact 3.4.1.1 Manage Customer Contact

6.2.1.74 Analyze Active SA

6.2.1.75 Cancel SA?

6.2.1.76 Evaluate Eligibility For Cancellation

6.2.1.77 Request Cancel Adjustment(s) And Update Balance

6.2.1.78 Cancel Adjustment(s) and Reflect Changes to Balance

6.2.1.79 Cancel Bill Segment 4.2.2 Manage Bill

6.2.1.80 Stop Premise Based Service For Landlord - Tenant

6.2.1.81 Cancel Payment 4.3.1.1 Manage Payments

6.2.1.82 Cancel SA

6.2.1.83 Take No Further Action

6.2.1.84 Request For Cancel

6.2.1.85 Schedule Service Agreement Activation Process

6.2.1.86 Identify Pending Start Service Agreements Ready for Activation

6.2.1.87 Start Date <= Current Date And Read Exists?

6.2.1.88 Highlight Exceptions

6.2.1.89 Create To Do Entry

6.2.1.90 Update SA And Change Status To Active

6.2.1.91 Add Customer Contact 3.4.1.1 Manage Customer Contact

6.2.1.92 Analyze Active SA

6.2.1.93 Cancel SA?

6.2.1.94 Evaluate Eligibility For Cancellation

6.2.1.95 Request Cancel Adjustment(s) And Update Balance

6.2.1.96 Cancel Adjustment(s) and Reflect Changes to Balance

6.2.1.97 Cancel Bill Segment 4.2.2 Manage Bill

6.2.1.98 Stop Premise Based Service For Landlord - Tenant

6.2.1.99 Cancel Payment 4.3.1.1 Manage Payments

6.2.1.100 Cancel SA

6.2.1.101 Take No Further Action

6.2.1.102 Request For Cancel

6.2.1.103 Schedule Service Agreement Activation Process

6.2.1.104 Identify Pending Start Service Agreements Ready for Activation

6.2.1.105 Start Date <= Current Date And Read Exists?

6.2.1.106 Highlight Exceptions

6.2.1.107 Create To Do Entry

6.2.1.108 Update SA And Change Status To Active

6.2.1.109 Add Customer Contact 3.4.1.1 Manage Customer Contact

6.2.1.110 Analyze Active SA

6.2.1.111 Cancel SA?

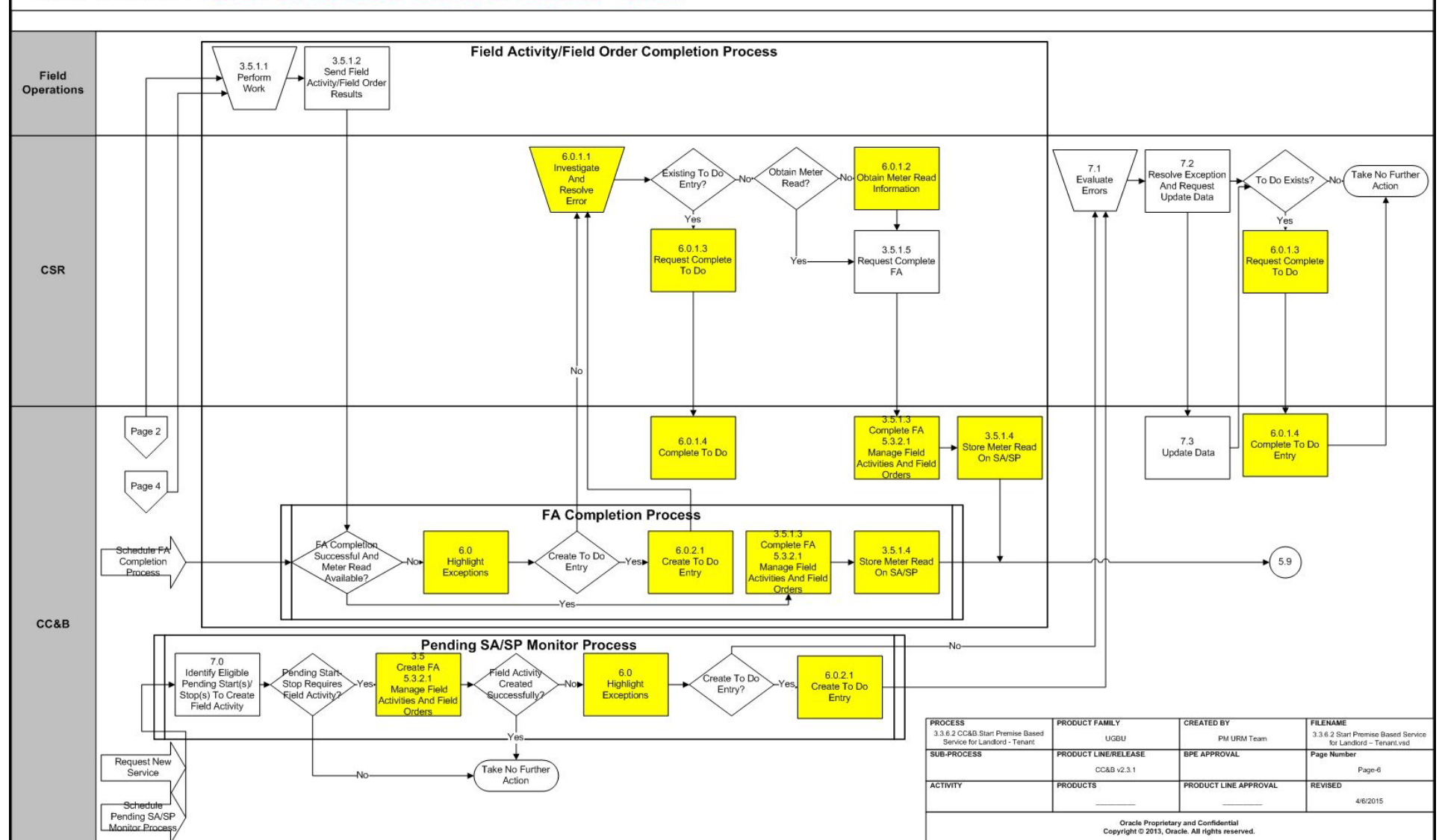
6.2.1.112 Evaluate Eligibility For Cancellation

6.2.1.113 Request Cancel Adjustment(s) And Update Balance

6.2.1.114 Cancel Adjustment(s) and Reflect Changes to Balance</

# Start Premise Based Service for Landlord-Tenant Process Model - Page 6

## 3.3.6.2 CC&B v2.4 *Start Premise Based Service for Landlord - Tenant*



# Start Premise Based Service for Landlord-Tenant Detailed Process Model Description

This section includes detailed descriptions of the steps involved in the Start Premise Based Service for Landlord-Tenant business process, including:

- ♦ 1.0 Search for Premise
- ♦ 1.1 5.1.5.1a Manage Metered Site
- ♦ 1.2 Search for Customer - Landlord
- ♦ 1.3 3.3.1.1 Establish Person and/or Account
- ♦ 1.4 Evaluate Account and Starting Premise for Landlord
- ♦ 1.5 Determine Impact on Pending Start SA for Landlord
- ♦ 1.6 Make Changes
- ♦ 1.7 Update Pending Start SA for Landlord
- ♦ 1.8 Request Update Start Date for LL Pending Start SA and Pending Stop SA for Tenant
- ♦ 1.9 Update Pending Stop SA for Tenant
- ♦ 2.0 Update Pending Start SA for Landlord
- ♦ 2.1 Update FA 5.3.2.1 Manage Field Activities and Field Orders
- ♦ 2.2 Request Update Pending Start SA for Landlord
- ♦ 2.3 Request Credit Review from External Credit Bureau
- ♦ 2.4 Provide External Credit Score Information
- ♦ 2.5 Receive Results from External Credit Bureau
- ♦ 2.6 Evaluate Results from External Credit Bureau
- ♦ 2.7 3.3.3.2 Determine Customer Deposit Process
- ♦ 2.8 Determine Specific Requirements for Each Start SA
- ♦ 2.9 Confirm Start Service Information and Mailing Address
- ♦ 3.0 Store Future Mailing Address
- ♦ 3.1 Add Pending Start SA for Landlord and Link SA/SP
- ♦ 3.2 Add Pending Start Alert
- ♦ 3.3 Populate End Date and Update SA Status to Pending Stop for Existing Tenant
- ♦ 3.4 Add Pending Stop SA Alert
- ♦ 3.5 Create FA 5.3.2.1 Manage Field Activities and Field Orders
- ♦ 3.6 Complete FA Using Recent Read 5.3.2.1 Manage Field Activities and Field Orders
- ♦ 3.7 3.3.2.2 Start Non-Premise Based Service
- ♦ 3.8 Evaluate Pending Start SA for Landlord
- ♦ 3.9 Update SA/SP with Read
- ♦ 4.0 Request Activate SA
- ♦ 4.2 Initiate Cancel Pending Start SA for Landlord
- ♦ 4.3 Cancel Pending Start SA for Landlord
- ♦ 4.4 Cancel Pending Stop SA for Tenant
- ♦ 4.5 Cancel FA 5.3.2.1 Manage Field Activities and Field Orders
- ♦ 4.6 Search for Customer - Tenant
- ♦ 4.7 Evaluate Premise to Start
- ♦ 4.8 Evaluate Account for New Tenant
- ♦ 4.9 Determine Impact on Pending Start SA for Tenant
- ♦ 5.0 Update Pending Start SA for Tenant
- ♦ 5.1 Request Update Pending Start SA End Date
- ♦ 5.2 Update Pending Stop SA Date
- ♦ 5.3 Add Pending Start SA for Tenant, and Link SA/SP Group
- ♦ 5.4 Change Existing Tenant Pending Stop Date to Match Pending Start Date for New Tenant

- ♦ 5.5 Update Landlord Pending Start SA with Pending Stop Date to Match Pending Start Date for Tenant
- ♦ 5.6 Evaluate Pending Start SA for Tenant
- ♦ 5.7 Initiate Cancel for Pending Start SA for New Tenant
- ♦ 5.8 Cancel Pending Start SA for New Tenant
- ♦ 5.9 Identify Pending Start Service Agreements Ready for Activation
- ♦ 6.0 Highlight Exceptions
  - ♦ 6.0.1.1 Investigate and Resolve Error
  - ♦ 6.0.1.2 Obtain Meter Read Information
  - ♦ 6.0.1.3 Request Complete To Do
  - ♦ 6.0.1.4 Complete To Do
  - ♦ 6.0.2.1 Create To Do Entry
  - ♦ 6.0.2.2 Add Customer Contact 3.4.1.1 Manage Customer Contact
- ♦ 6.1 Analyze Active SA
- ♦ 6.2 Evaluate Eligibility for Cancellation
- ♦ 6.3 Request Cancel Adjustments and Update Balance
- ♦ 6.4 Cancel Adjustments and Reflect Changes to Balance
- ♦ 6.5 Cancel Bill Segment - 4.2.2 Manage Bill
- ♦ 6.6 3.3.6.3 Stop Premise Based Service for Landlord - Tenant
- ♦ 6.7 Cancel Payment 4.3.1.1 Manage Payments
- ♦ 6.8 Initiate Cancel SA
- ♦ 6.9 Cancel SA
- ♦ 3.5.1.1 Perform Work
- ♦ 3.5.1.2 Send Field Activity/Field Order/ Results
- ♦ 3.5.1.3 Complete FA
- ♦ 3.5.1.4 Store Meter Read on SA/SP
- ♦ 3.5.1.5 Request Complete FA
- ♦ 7.0 Identify Eligible Pending Start/Stops to Create Field Activity
- ♦ 7.1 Evaluate Errors
- ♦ 7.2 Resolve Exception and Request Update Data
- ♦ 7.3 Update Data



## 1.0 Search for Premise

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

**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.

### Entities to Configure

- Installation Options - Framework
- Zones

### Available Algorithms

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

## 1.1 5.1.5.1a Manage Metered Site

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

**Actor/Role:** CSR

**Description:** The Premise is associated with a new development or new property to be established in CC&B. The customer request could be from a Property Manager, Developer, owner or tenant. Refer to 5.1.5.1 Manage Metered Site.

## 1.2 Search for Customer - Landlord

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

**Actor/Role:** CSR

**Description:** Upon receipt of request for Start Service, the CSR or Authorized User locates the customer (landlord) 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.

### Entities to Configure

- Installation Options - Framework
- Zones

### Available Algorithms

- CI\_PER-INFO - This person information algorithm display summary information (name, phone number) that appears adjacent to a person ID throughout the system.
- CI\_ACCT-INFO - This algorithm formats the "Account Information" that appears throughout the system.
- C1\_PENDST-DF - Highlight Pending Start Service Agreements

### 1.3 3.3.1.1 Establish Person and/or Account

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

**Actor/Role:** CSR

**Description:** The landlord needs to be established in CC&B 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 CC&B as a customer. Refer to 3.3.1.1 Establish Person and/or Account.

### 1.4 Evaluate Account and Starting Premise for Landlord

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

**Actor/Role:** CSR

**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 CC&B. Typically there are business rules and procedures to make this decision for starting service.

### 1.5 Determine Impact on Pending Start SA for Landlord

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

**Actor/Role:** CSR

**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

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

**Actor/Role:** CSR

**Description:** After confirming the change The CSR or Authorized User enters required information in CC&B. 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. CC&B address sources include Person, Premise, and Account. The address information is effective when the Service Agreement is activated.

### 1.7 Update Pending Start SA for Landlord

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

**Actor/Role:** CC&B

**Description:** The Pending Date Start SA for the landlord is updated in CC&B with all the related Field Activities.

**Entities to Configure**

- Installation Options - Framework
- SA Type



**Available Algorithms**

- C1-SAI-INFO - This Installation algorithm formats the "SA Information" that appears throughout the system.
- CI\_SASPFWCRE - Create field activities for pending start and pending stop service agreements if Field Activities do not already exist.
- C1-SAT-INFO - This SA Type algorithm formats the "SA Information" that appears throughout the system.

**Business Objects**

- 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 Integrating to Oracle MDM

## 1.8 Request Update Start Date for LL Pending Start SA and Pending Stop SA for Tenant

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

**Actor/Role:** CSR

**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.

## 1.9 Update Pending Stop SA for Tenant

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

**Actor/Role:** CC&B

**Description:** The Pending Stop SA for an existing tenant is updated in CC&B.

**Entities to Configure**

- Installation Options - Framework
- SA Type

**Available Algorithms**

- CI\_SASPFWCRE - Create field activities for pending start and pending stop service agreements if Field Activities do not already exist.
- C1-SAT-INFO - This SA Type algorithm formats the "SA Information" that appears throughout the system.
- CI\_LLREV-C - 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.

**Business Objects**

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

## 2.0 Update Pending Start SA for Landlord

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

**Actor/Role:** CC&B

**Description:** The Pending Start SA for the landlord is updated in CC&B.

### Entities to Configure

- Installation Options - Framework
- SA Type

### Available Algorithms

- C1-SAI-INFO - This Installation algorithm formats the "SA Information" that appears throughout the system.
- CI\_SASPFWCRE - Create field activities for pending start and pending stop service agreements if Field Activities do not already exist.
- C1-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.

### Business Objects

- C1-SABasic - Service Agreement Basic
- C1-MDM1SA - SA Information for MDM1 SA Sync - Used only when Intergrating to Oracle MDM
- C1-MDM2SA - MDM2 SA - Used only when Intergrating 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 Intergrating to Oracle MDM

## 2.1 Update FA 5.3.2.1 Manage Field Activities and Field Orders

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

**Actor/Role:** CC&B

**Description:** An existing Pending Field Activity and/or Field Order require updating. Refer to 5.3.2.1 Manage Field Activities and Field Orders.

## 2.2 Request Update Pending Start SA for Landlord

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

**Actor/Role:** CSR

**Description:** There may just 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 Request Credit Review from External Credit Bureau

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

**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 Names**

- Credit Bureau Interface - 100% Custom Process

## 2.4 Provide External Credit Score Information

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

**Actor/Role:** External Credit Bureau

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

**Process Names**

- Credit Bureau Interface - 100% Custom Process

## 2.5 Receive Results from External Credit Bureau

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

**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 Names**

- Credit Bureau Interface - 100% Custom Process

## 2.6 Evaluate Results from External Credit Bureau

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

**Actor/Role:** CSR

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

## 2.7 3.3.3.2 Determine Customer Deposit Process

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

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

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

## 2.8 Determine Specific Requirements for Each Start SA

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

**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.

### Entities to Configure

- SA Type
- SA Start Options
- Installation Options - Frameworks

### Available Algorithms

- C1-SAI-INFO - This Installation algorithm formats the "SA Information" that appears throughout the system.
- CI\_SASPFWCRE - Create field activities for pending start and pending stop service agreements if Field Activities do not already exist.
- C1-SAT-INFO - This SA Type algorithm formats the "SA Information" that appears throughout the system.

## 2.9 Confirm Start Service Information and Mailing Address

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

**Actor/Role:** CSR

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

## 3.0 Store Future Mailing Address

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

**Actor/Role:** CC&B

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

### Entities to Configure

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

### Business Objects

- Address Premise business object for address

### 3.1 Add Pending Start SA for Landlord and Link SA/SP

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

**Group:** Create SA

**Actor/Role:** CC&B

**Description:** CC&B creates a Service Agreement for the landlord in Pending Start status. Through Start Service Initiation, Service Point information is linked to the Service Agreement.

**Entities to Configure**

- FA Type
- SA Type
- SA start option
- FA Type Profile
- Dispatch Groups

**Available Algorithms**

- CI\_SASPFWCRE - Create field activities for pending start and pending stop service agreements.

### 3.2 Add Pending Start Alert

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

**Group:** Create SA

**Actor/Role:** CC&B

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

**Entities to Configure**

- Installation Options - Framework

**Available Algorithms**

- C1\_PENDST-DF - Highlight Pending Start Service Agreements as Control Central alerts.
- CCAL-FAERMSG Highlight FAs with outstanding outgoing messages

### 3.3 Populate End Date and Update SA Status to Pending Stop for Existing Tenant

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

**Groups:**

- Create SA
- Stop SA

**Actor/Role:** CC&B

**Description:** When service is started for a landlord or tenant, a Pending Stop SAs is created for the existing customer that has existing active service.

**Entities to Configure**

- Installation Options - Framework
- SA Type

**Available Algorithms**

- C1-SAI-INFO - This Installation algorithm formats the "SA Information" that appears throughout the system.
- CI\_SASPFWCRE - Create field activities for pending start and pending stop service agreements if Field Activities do not already exist.
- C1-SAT-INFO - This SA Type algorithm formats the "SA Information" that appears throughout the system.

### 3.4 Add Pending Stop SA Alert

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

**Groups:**

- Create SA
- Stop SA

**Actor/Role:** CC&B

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

**Entities to Configure**

- Installation Options - Framework

**Available Algorithms**

- C1-STOP-SA - Highlight Pending Stop Service Agreements as Control Central alerts

### 3.5 Create FA 5.3.2.1 Manage Field Activities and Field Orders

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

**Group:** Create SA

**Actor/Role:** CC&B

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

**Process Names**

- 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 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.

**Entities to Configure**

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

**Available Algorithms**

- CI\_SASPFWCRE - 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.
- C1-DGRP-DFLT - Default Dispatch Group on a Field Activity.
- C1-FACCHARGE - Field Activity Completion - This algorithm applies charges by creating an adjustment.
- CCAL-FAERMSG - Highlight (Alert) FAs with outstanding outgoing message.

## 3.6 Complete FA Using Recent Read

### 5.3.2.1 Manage Field Activities and Field Orders

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

**Actor/Role:** CC&B

**Description:** If configured, CC&B can use a recent scheduled read rather than requiring a separate trip to obtain a read in the field. Refer to 5.3.2.1 Manage Field Activities and Field Orders.

## 3.7 3.3.2.2 Start Non-Premise Based Service

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

**Actor/Role:** CSR

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

## 3.8 Evaluate Pending Start SA for Landlord

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

**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 (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 Update SA/SP with Read

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

**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.

### 4.0 Request Activate SA

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

**Actor/Role:** CSR

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

### 4.1 Update SA and Change Status to Active

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

**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 Names**

- **SAACT** - The service agreement activation process updates the status and SA/SP reads for pending start and pending stop service agreements.

**Available Algorithms**

- **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.

### 4.2 Initiate Cancel Pending Start SA for Landlord

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

**Actor/Role:** CSR

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

### 4.3 Cancel Pending Start SA for Landlord

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

**Group:** Create SA

**Actor/Role:** CC&B

**Description:** The Pending Start SA for the landlord is canceled in CC&B.



## 4.4 Cancel Pending Stop SA for Tenant

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

**Actor/Role:** CC&B

**Description:** If a Pending Stop SA exists for the tenant it is also canceled in CC&B.

## 4.5 Cancel FA 5.3.2.1 Manage Field Activities and Field Orders

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

**Actor/Role:** CC&B

**Description:** Refer to 5.3.2.1 for canceling Field Activities.

## 4.6 Search for Customer - Tenant

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 3 on page 5](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** Upon receipt of request for Start Service, the CSR or Authorized User locates the customer (tenant) 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.

### Entities to Configure

- Installation Options - Framework

### Available Algorithms

- CI\_PER-INFO - This Installation algorithm formats the "Person Information" that appears throughout the system.
- CI\_PER-NM-VL - This Installation algorithm validates the name for person type entries.

## 4.7 Evaluate Premise to Start

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 3 on page 5](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**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.

## 4.8 Evaluate Account for New Tenant

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 3 on page 5](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** The CSR or Authorized User reviews the Account to determine if service can be started for the tenant as a customer in CC&B. Typically there are business rules and procedures to make this decision for starting service.

## 4.9 Determine Impact on Pending Start SA for Tenant

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 3 on page 5](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**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.

## 5.0 Update Pending Start SA for Tenant

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 3 on page 5](#) for the business process diagram associated with this activity.

**Actor/Role:** CC&B

**Description:** The Pending Start SA for the tenant is updated in CC&B.

## 5.1 Request Update Pending Start SA End Date

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 3 on page 5](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**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.

## 5.2 Update Pending Stop SA Date

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 3 on page 5](#) for the business process diagram associated with this activity.

**Actor/Role:** CC&B

**Description:** The Pending Start SA for the tenant is updated in CC&B.

## 5.3 Add Pending Start SA for Tenant, and Link SA/SP Group

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 4 on page 6](#) for the business process diagram associated with this activity.

**Actor/Role:** CC&B

**Description:** CC&B creates a Service Agreement for the tenant in Pending Start status. Through Start Service Initiation, Service Point information is linked to the Service Agreement.

### Entities to Configure

- Installation Options - Framework
- SA Type

### Available Algorithms

- New SA To Do - Create a To Do entry when a SA is added

## 5.4 Change Existing Tenant Pending Stop Date to Match Pending Start Date for New Tenant

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 4 on page 6](#) for the business process diagram associated with this activity.

**Group:**

- Landlord Reversion
- Create SA

**Actor/Role:** CC&B

**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.

**Entities to Configure**

- SA Type

**Available Algorithms**

- CI\_LLREV-C - This algorithm causes service to be started under a landlord's account at a service point covered by a landlord agreement

## 5.5 Update Landlord Pending Start SA with Pending Stop Date to Match Pending Start Date for Tenant

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 4 on page 6](#) for the business process diagram associated with this activity.

**Group:**

- Landlord Reversion
- Create SA

**Actor/Role:** CC&B

**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.

**Entities to Configure**

- SA Type

**Available Algorithms**

- CI\_LLREV-C - This algorithm causes service to be started under a landlord's account at a service point covered by a landlord agreement

## 5.6 Evaluate Pending Start SA for Tenant

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 4 on page 6](#) for the business process diagram associated with this activity.

**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 (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.

## 5.7 Initiate Cancel for Pending Start SA for New Tenant

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 4 on page 6](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

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

## 5.8 Cancel Pending Start SA for New Tenant

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 4 on page 6](#) for the business process diagram associated with this activity.

**Actor/Role:** CC&B

**Description:** The Pending Start SA for the new tenant is canceled in CC&B.

## 5.9 Identify Pending Start Service Agreements Ready for Activation

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 4 on page 6](#) for the business process diagram associated with this activity.

**Group:** Service Agreement Activation Process

**Actor/Role:** CC&B

**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.
- **Automated Process:** CC&B will automatically transition the Service Agreement to Active status when all required information is made available.

### Process

- SAACT - The service agreement activation process updates the status and SA/SP reads for pending start and pending stop service agreements.

### Entities to Configure

- SA Type
- Batch Control

### Available Algorithms

- 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.

## 6.0 Highlight Exceptions

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 4 on page 6](#) for the business process diagram associated with this activity.

**Group:**

- Service Agreement Activation Process
- Field Activity 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 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. The FA Completion process will also create exception records for Field Activities with missing or incomplete information.

**Process Names**

- SAACT - The service agreement activation process updates the status and SA/SP reads for pending start and pending stop service agreements.
- TD-SSFTL - To Do for Old Pending Start/Stops-catches start/stop requests that have gone unfulfilled.
- FACOMPL - The field activity completion process completes field activities and field orders using the records in the various field activity staging tables.

**Entities to Configure**

- To Do Types
- To Do Roles
- Batch Control

### 6.0.1.1 Investigate and Resolve Error

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 5 on page 7](#) for the business process diagram associated with this activity.

**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.

### 6.0.1.2 Obtain Meter Read Information

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 5 on page 7](#) for the business process diagram associated with this activity.

**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.

### 6.0.1.3 Request Complete To Do

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 5 on page 7](#) for the business process diagram associated with this activity.

**Group:** Field Activity/Field Order Completion Process

**Actor/Role:** CSR

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

**Entities to Configure**

- To Do Types
- To Do Roles

### 6.0.1.4 Complete To Do

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 5 on page 7](#) for the business process diagram associated with this activity.

**Group:** Field Activity/Field Order Completion Process

**Actor/Role:** CC&B

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

**Entities to Configure**

- To Do Types
- To Do Roles

### 6.0.2.1 Create To Do Entry

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 5 on page 7](#) for the business process diagram associated with this activity.

**Group:** Service Agreement Activation Process

**Actor/Role:** CC&B

**Description:** If configured, To Do Entries are created for exception processing. The exception is also available for viewing and resolution on a separate page in CC&B.

**Process Names**

- TD-FAUPL - This background process creates a To Do entry for every field activity upload staging record that's in error.
- SAACT - The service agreement activation process updates the status and SA/SP reads for pending start and pending stop service agreements.
- TD-SSFTL To Do for Old Pending Start/Stops-catches start/stop requests that have gone unfulfilled.
- FACOMPL - The field activity completion process completes field activities and field orders using the records in the various field activity staging tables.

**Entities to Configure**

- To Do Types
- To Do Roles
- Batch Control

## 6.0.2.2 Add Customer Contact 3.4.1.1 Manage Customer Contact

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 5 on page 7](#) for the business process diagram associated with this activity.

**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.

- **Manual Process:** The CSR or Authorized User can create a Customer Contact online based on established business rules.
- **Automated Process:** Based on configuration a Customer Contact can be created automatically.

### Process Names

- SAACT - The service agreement activation process updates the status and SA/SP reads for pending start and pending stop service agreements.

### Entities to Configure

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

### Available Algorithms

- SAAT-CC This algorithm creates a Customer Contact upon SA Activation.

## 6.1 Analyze Active SA

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 5 on page 7](#) for the business process diagram associated with this activity.

**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 (landlord or tenant) may request to cancel the original request after the Service Agreement is activated.

## 6.2 Evaluate Eligibility for Cancellation

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 5 on page 7](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**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.

## 6.3 Request Cancel Adjustments and Update Balance

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 5 on page 7](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** The CSR or Authorized User cancels applicable adjustments in order to cancel the Service Agreement. The Service Agreement balance is updated accordingly.

**Entities to Configure**

- Adjustment Cancel Reason

## 6.4 Cancel Adjustments and Reflect Changes to Balance

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 5 on page 7](#) for the business process diagram associated with this activity.

**Actor/Role:** CC&B

**Description:** The Service Agreement balance is updated in CC&B to reflect the adjustment cancellation.

**Entities to Configure**

- Adjustment Cancel Reason

## 6.5 Cancel Bill Segment - 4.2.2 Manage Bill

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 5 on page 7](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** Refer to 4.2.2 Manage Bill for cancellation of Bill Segments.

## 6.6 3.3.6.3 Stop Premise Based Service for Landlord - Tenant

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 5 on page 7](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** At times it is not possible to cancel financial transactions. The Service Agreement must be stopped. Refer to 3.3.6.3 Stop Premise Based Service for Landlord - Tenant.

## 6.7 Cancel Payment 4.3.1.1 Manage Payments

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 5 on page 7](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** Refer to 4.3.1.1 Manage Payments for cancellation of Payments.

## 6.8 Initiate Cancel SA

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 5 on page 7](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

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



## 6.9 Cancel SA

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 5 on page 7](#) for the business process diagram associated with this activity.

**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.

**Entities to Configure**

- To Do Type
- To Do Role
- SA Type

**Available Algorithms**

- SACA CRTODO - Create To Do Entry when SA Canceled

### 3.5.1.1 Perform Work

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 6 on page 8](#) for the business process diagram associated with this activity.

**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.

### 3.5.1.2 Send Field Activity/Field Order/ Results

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 6 on page 8](#) for the business process diagram associated with this activity.

**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 and 4.2.1.2a Load Meter Reads.

**Process Names**

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

### 3.5.1.3 Complete FA

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 6 on page 8](#) for the business process diagram associated with this activity.

**Group:**

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

**Actor/Role:** CC&B

**Description:** If fieldwork is required, a Field Activity is created. The Field Activity Type is configured based on specific profiles. Each Field Activity eligible for dispatch will have a specific Dispatch Group defined for every Service Point Type and Operations Area. The SA type SA/SP

Fieldwork Creation algorithm determines if a Field Activity is necessary. The background process, Pending SA/SP Monitor, creates Field Activities for Pending Start and Stop Agreements shortly before the start/stop date if Field Activities have not already been created. Once the Field Activity is completed the start read is made available in CC&B. The background process, Service Agreement Activation, uses this Field Activity information to determine if the Pending Service Agreement can be activated. Refer to 5.3.2.1 Manage Field Activities and Field Orders.

#### Process Names

- 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 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
- SA Type

#### Available Algorithms

- CI\_SASPFWCRE - 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.
- C1-DGRP-DFLT - Default Dispatch Group on a Field Activity.
- C1-FACCHARGE - Field Activity Completion - this algorithm applies charges by creating an adjustment
- FACMPL-FLATC - this algorithm levies a flat charge

### 3.5.1.4 Store Meter Read on SA/SP

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 6 on page 8](#) for the business process diagram associated with this activity.

#### Group:

- FA Completion Process
- 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.

### 3.5.1.5 Request Complete FA

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 6 on page 8](#) for the business process diagram associated with this activity.

**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.

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

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 6 on page 8](#) for the business process diagram associated with this activity.

**Group:** Pending SA/SP Monitor Process

**Actor/Role:** CC&B

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

### Process Names

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

## 7.1 Evaluate Errors

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 6 on page 8](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

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

## 7.2 Resolve Exception and Request Update Data

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 6 on page 8](#) for the business process diagram associated with this activity.

**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.

## 7.3 Update Data

**Reference:** [Start Premise Based Service for Landlord-Tenant Process Model - Page 6 on page 8](#) for the business process diagram associated with this activity.

**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
CCAL WFACCTR	Display active WF for account based on char
CCAL WFPREMR	Display active WF for premise based on char
CCAL-TD	Highlight Outstanding To Do Entries
CCAL-DECL	Highlight Effective Declarations for Account and Premise
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_OMF_DF	Highlight Open and Disputed Match Even
CI_STOPSA-DF	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

## Related Training

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

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