

Oracle Utilities Customer Care and Billing Release 2.4.0

Utility Reference Model

4.2.1.7 Apply Miscellaneous Charges

December 2015

Oracle Utilities Customer Care and Billing Utility Reference Model 4.2.1.7, Release 2.4.0

Copyright © 2015, Oracle and/or its affiliates. All rights reserved.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

Contents

4.2.1.7 Apply Miscellaneous Charges.....	1
Brief Description	2
Actors/Roles.....	2
Business Process Diagrams	3
Apply Miscellaneous Charges Process Model - Page 1	3
Apply Miscellaneous Charges Detailed Process Model Description	4
1.0 Report Service Order Details.....	5
1.1 Search for Billable Charge Service Agreement for Customer's Account	5
1.2 Refer to 3.3.2.2 Start Non-Premise Based Service	5
1.3 Initiate New Billable Charge and Request Default Data	5
1.4 Retrieve Standard BC Details.....	6
1.5 Review Standard Pre-Populate Details	6
1.6 Populate Billable Charge Details	6
1.7 Request to Add Billable Charge.....	6
1.8 Add Billable Charge.....	6
1.9 Request to Update Billable Charge	7
2.0 Update Billable Charge	7
2.1 Request to Cancel Billable Charge	7
2.2 Update Billable Charge Status to Canceled.....	7
Related Training.....	8

4.2.1.7 Apply Miscellaneous Charges

This section provides a description of the “Apply Miscellaneous Charges” business process. It includes:

- ♦ [Brief Description](#)
 - ♦ [Actors/Roles](#)
- ♦ [Business Process Diagrams](#)
 - ♦ [Apply Miscellaneous Charges Process Model - Page 1](#)
- ♦ [Apply Miscellaneous Charges Detailed Process Model Description](#)
- ♦ [Related Training](#)

Brief Description

Business Process: Apply Miscellaneous Charges

Process Type: Sub-process

Parent Process: 4.2.1. CC&B.Collect and Process Measurements

Sibling Processes:

- 4.2.1.6 CC&B.Receive External Charges
- 4.2.2.4. CC&B.Manage External Charges and Miscellaneous Charges
- 3.3.2.2 CC&B.Start Non-Premise Based Service

The Apply Miscellaneous Charges process takes place whenever Utility Company provides the service that occurs outside of main course of business.

The process starts when Customer requests additional miscellaneous service or the miscellaneous service is provided by Company based on current needs (e.g. tree trimming). An Authorized User creates a billable charge whenever a customer should be levied an ad hoc charge. This charge will be included into the next (one or more) Customer's bills (see sibling process 4.2.2.4 CC&B.Manage External Charges and Miscellaneous Charges for details).

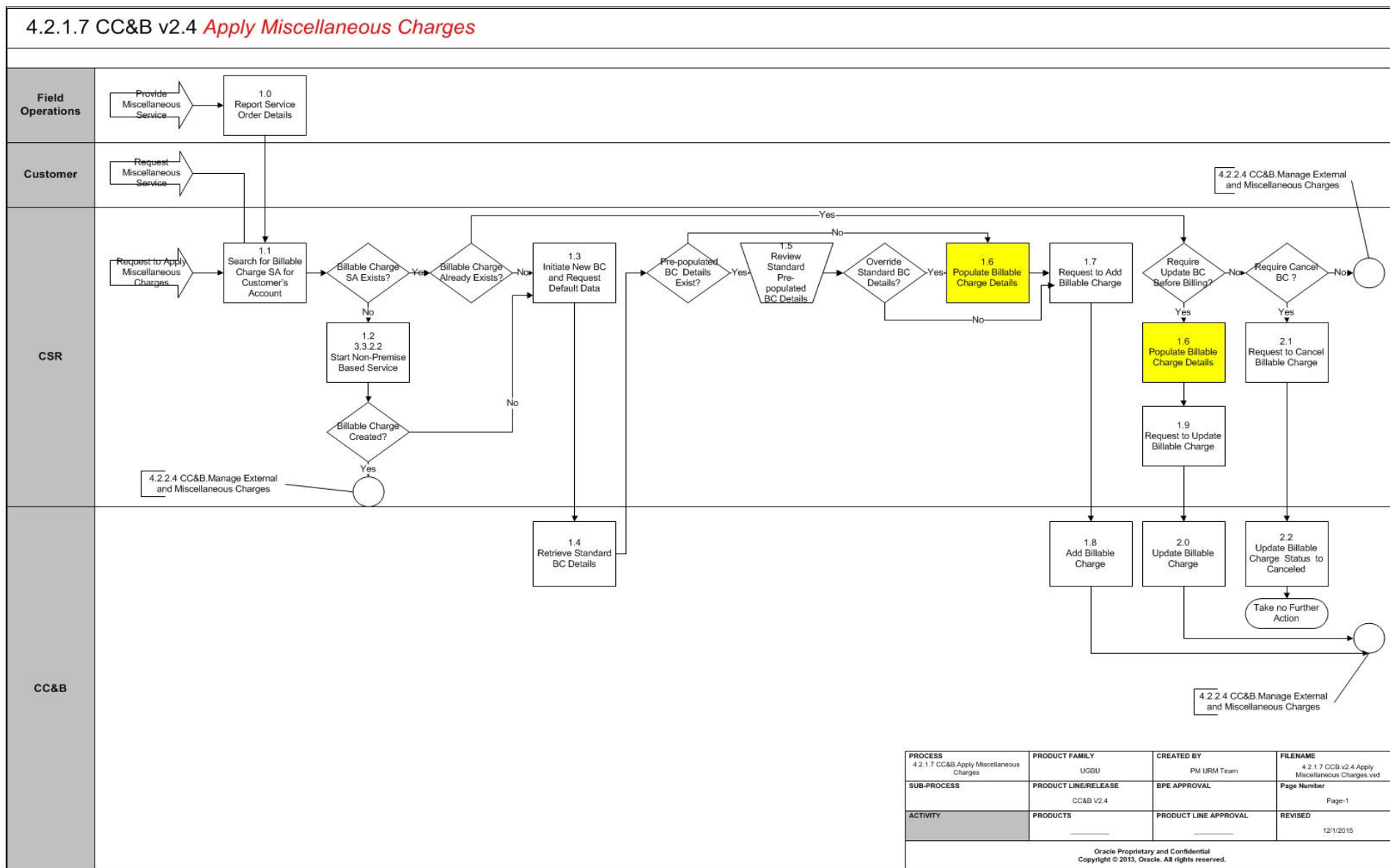
Actors/Roles

The Apply Miscellaneous Charges 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.
- **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).
- **CSR:** CSR or Authorized User of the Customer Care and Billing application.

Business Process Diagrams

Apply Miscellaneous Charges Process Model - Page 1



Apply Miscellaneous Charges Detailed Process Model Description

This section provides a detailed description of the “Apply Miscellaneous Charges” business process, including:

- ♦ 1.0 Report Service Order Details
- ♦ 1.1 Search for Billable Charge Service Agreement for Customer's Account
- ♦ 1.2 Refer to 3.3.2.2 Start Non-Premise Based Service
- ♦ 1.3 Initiate New Billable Charge and Request Default Data
- ♦ 1.4 Retrieve Standard BC Details
- ♦ 1.5 Review Standard Pre-Populate Details
- ♦ 1.6 Populate Billable Charge Details
- ♦ 1.7 Request to Add Billable Charge
- ♦ 1.8 Add Billable Charge
- ♦ 1.9 Request to Update Billable Charge
- ♦ 2.0 Update Billable Charge
- ♦ 2.1 Request to Cancel Billable Charge
- ♦ 2.2 Update Billable Charge Status to Canceled

1.0 Report Service Order Details

Reference: [Apply Miscellaneous Charges Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: Field Operations

Description: After providing additional service to the Customer Field Operations report details of provided Service to CSR in order to charge customer for the service.

1.1 Search for Billable Charge Service Agreement for Customer's Account

Reference: [Apply Miscellaneous Charges Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: There are few business events that can cause this task to perform. One of them is described in 1.0 Report Service Order Details.

The most typical are:

- Customer contacts Utility Company and requests additional miscellaneous services.
- Company identifies the needs to provide additional services and , as a result, to apply billable charges.

When CSR decides to apply Billable Charges to Customer's Service Agreement after analyzing nature of services, CSR or Authorized User attempts to find available Customer's Billable Charge SA.

1.2 Refer to 3.3.2.2 Start Non-Premise Based Service

Reference: [Apply Miscellaneous Charges Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: If Customer doesn't have Billable Charge Service Agreement, CSR creates it. Refer to 3.3.2.2 Start Non-Premise Based Service.

Note: Some Companies prefer to create Billable Charge automatically when Billable Charge Service Agreement is activated (e.g. One off charges) IT could be done by configuring appropriate SA Type Start Option and providing Billable Charge Template.

Entities to Configure

- SA Type
- SA Type Start Option
- Billable Charge Template

1.3 Initiate New Billable Charge and Request Default Data

Reference: [Apply Miscellaneous Charges Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: If Customer has Billable Charge Service Agreement and Billable Charge for the service hasn't been applied yet, CSR or Authorized User initiates Billable charge creation process.

1.4 Retrieve Standard BC Details

Reference: [Apply Miscellaneous Charges Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CC&B

Description: CC&B retrieves and populates default Billable Charge details if available.

Entities to Configure

- SA Type
- Billable Charge Template

1.5 Review Standard Pre-Populate Details

Reference: [Apply Miscellaneous Charges Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: CSR reviews and evaluates pre-populated default Billable Charge details using Billable Charge page.

1.6 Populate Billable Charge Details

Reference: [Apply Miscellaneous Charges Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: If default data is not available or pre-populated/existing data doesn't satisfy current requirements for Billable Charge, CSR or Authorized User populates correct Billable Charge details using Billable Charge page.

1.7 Request to Add Billable Charge

Reference: [Apply Miscellaneous Charges Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: CSR or Authorized User requests to add a new Billable Charge.

1.8 Add Billable Charge

Reference: [Apply Miscellaneous Charges Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CC&B

Description: CC&B adds a new Billable Charge and link it to Customer's Billable Charge Service Agreement.

Entities to Configure

- Characteristic Type
- Unit of Measure
- Time of Use
- Service Quantity Identifier
- Distribution Code

1.9 Request to Update Billable Charge

Reference: [Apply Miscellaneous Charges Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: If CSR or Authorized User identifies the needs to update existing Billable Charge, CSR or Authorized User populates the changes (refer to step 1.6 Populate Billable Charge Details for details) and requests update the data.

2.0 Update Billable Charge

Reference: [Apply Miscellaneous Charges Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CC&B

Description: CC&B updates Billable charge data.

2.1 Request to Cancel Billable Charge

Reference: [Apply Miscellaneous Charges Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: If CSR or Authorized User decides to cancel existing Billable Charge, CSR or Authorized User changes specific Billable Charge status to Canceled.

Note: Cancelled Billable charges will not be used in billing.

2.2 Update Billable Charge Status to Canceled

Reference: [Apply Miscellaneous Charges Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CC&B

Description: CC&B updates Billable Charge status to Canceled.

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