

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

Utility Reference Model

4.2.2.5 Manage Loan Charges

December 2015

Oracle Utilities Customer Care and Billing Utility Reference Model 4.2.2.5, 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

4.2.2.5 Manage Loan Charges

4.2.2.5 Manage Loan Charges.....	1
Brief Description	2
Actors/Roles.....	2
Business Process Diagrams	3
Manage Loan Charges Process Model - Page 1.....	3
Manage Loan Charges Process Model - Page 2.....	4
Manage Loan Charges Process Model - Page 3.....	5
Manage Loan Charges Process Model - Page 4.....	6
Manage Loan Charges Detailed Process Model Description	7
1.0 Search for Customer.....	9
1.1 Evaluate Customer Account Eligibility for Bill.....	9
1.2 Enter Specific Data for Bill Segments Generation.....	9
1.3 Request Calculate New Bill Segments	9
1.4 Identify Loan to Be Billed	10
1.5 Determine Bill Period, Consumption Period	10
1.6 Calculate Payment Amount and Loan Balances Charges	11
1.7 Calculate and Apply Loan Interest.....	11
1.8 Create Bill Segments Lines and Bill Segments	12
1.9 Mark Bill Segments as Closing Bill Segment	12
2.0 Stop Loan Service Agreement	13
2.1 Create Financial Transactions	13
2.1.1 Format Online Presentation	13
2.2 Review Bill Segments	14
2.3 Request Changes for Calculation of Loan Bill	14
2.4 Update Information.....	14
2.5 Request Delete Bill	15
2.6 Delete Bill.....	15
2.7 Request Delete Specific Bill Segments	15
2.8 Delete Bill Segments.....	15
2.9 Request Freeze Bill Segments	15
3.0 Freeze Bill Segments	16
3.1 Request Re-Bill Bill Segments.....	16
3.2 Update Bill Segments to Pending Cancel and Create New Bill Segments.....	16
3.3 Request Undo ReBill Bill Segments.....	17
3.4 Delete New Segments and Return Original Bill Segments to Frozen.....	17
3.5 Request Cancel Frozen Bill Segments	17
3.6 Update Bill Segments to Pending Cancel.....	17
3.7 Request Undo Cancel Bill Segments.....	17
3.8 Return Original Bill Segments to Frozen.....	18
3.9 Request Finalize Cancel Bill Segments	18
4.0 Update Bill Segments to Canceled	18
4.1 Request Add Bill Messages.....	18
4.2 Add Bill Messages	18

4.3 Request Complete Bill.....	19
4.4 Create Bill Message.....	19
4.5 Create Bill Messages Based on Configuration.....	20
4.6 Add Adjustments, Payments, and Bill Corrections to Affect Bill Amount.....	21
4.7 Determine Due Date, Late Payment Charge Date, and Credit Review Date	21
4.8 4.3.2.5a CC&B Manage Late Payment Charge.....	21
4.9 4.3.1.1d CC&B Manage Autopay	22
5.0 4.3.2.2 CC&B Manage Severance Process	22
5.1 4.3.2.5 CC&B Write Off Uncollectible Receivables.....	22
5.2 Add Additional Required Bill Messages.....	23
5.3 Update Bill with Completion Details.....	23
5.4 Review Bill	24
5.5 Make Necessary Changes for Bill.....	24
5.6 Request Reopen Bill	24
5.7 Update Current Bill to Reopen.....	24
5.8 Request Changes to Impact Balance.....	24
5.9 Update Balance.....	25
6.0 Extract Bill for Delivery.....	25
6.1 Produce Bill	25
6.2 Send Bill to Customer	25
6.3 Receives Bill.....	26
6.4 Select Accounts for Open Bill Cycle	26
6.5 Check Eligibility for Batch Billing.....	26
6.6 Highlight Bill Segment Exceptions	27
6.7 Highlight Bill Exceptions	27
6.8 Identify Bill Segments in Error Status.....	27
6.9 Create Bill Segment Exceptions To Do.....	28
7.0 Evaluate and Investigate Error.....	28
7.1 Resolve Error	28
7.2 Update Data.....	28
7.3 Request Complete To Do	29
7.4 Complete To Do Entry.....	29
7.5 Identify Bills in Error Status	29
7.6 Create Bill Exceptions To Do	29
Installation Options - Control Central Alert Algorithms	30
Related Training.....	31

4.2.2.5 Manage Loan Charges

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

- ♦ [Brief Description](#)
 - ♦ [Actors/Roles](#)
- ♦ [Business Process Diagrams](#)
 - ♦ [Manage Loan Charges Process Model - Page 1](#)
 - ♦ [Manage Loan Charges Process Model - Page 2](#)
 - ♦ [Manage Loan Charges Process Model - Page 3](#)
 - ♦ [Manage Loan Charges Process Model - Page 4](#)
- ♦ [Manage Loan Charges Detailed Process Model Description](#)
- ♦ [Installation Options - Control Central Alert Algorithms](#)
- ♦ [Related Training](#)

Brief Description

Business Process: 4.2.2.5 Manage Loan Charges

Process Type: Sub-Process

Parent Process: 4.2.2 CC&B Manage Bill

Sibling Processes:

- 4.2.2.2 CC&B Manage Meter Charges
- 4.2.2.3 CC&B Manage Item Charges
- 4.2.2.4 CC&B Manage External and Miscellaneous Charges
- 4.2.2.6 CC&B Manage Deposit Charges
- 4.3.1.1 CC&B Payments

This process describes Loan Billing. This process takes place if the Customer has a loan from the Utility Company. There are many reasons why the Utility Company practices to loan money to customers. For example:

- Finance service upgrades (e.g., to change to dual fuel)
- Support economic development (e.g., to extend a power line)
- Promote energy conservation (e.g., customers borrow to insulate their house)

Loans are billed on regular basis similar to other services provided by Utility Company. When the loan billing process is initiated, system bills the customer for the periodic payment amount that calculated based on the specific Utility company business rules and typically contains principal and calculated interest amount.

Most bills are produced in a Batch Billing process. However, the CSR or Authorized User can create Bills for loans manually if required. If a Bill is generated as valid but has missing or incomplete information, the CSR or Authorized User has the ability to modify the bill.

When bill is successfully completed the Utility Company makes it available for Customer.

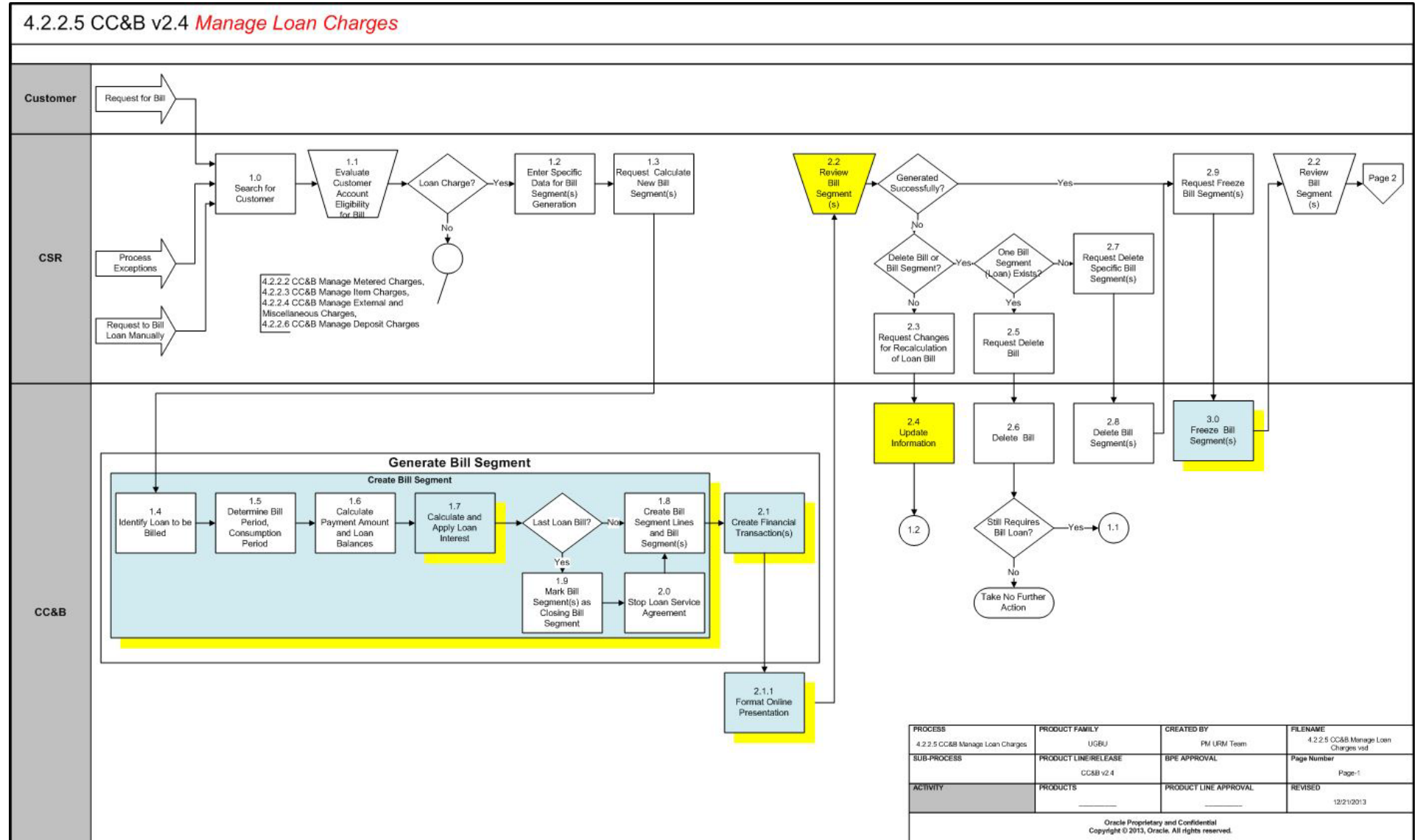
Actors/Roles

The Manage Loan Charges business process involves the following actors and roles:

- **CC&B:** The Customer Care and Billing application.
- **Customer:** Utility Company Customer
- **CSR:** CSR or Authorized User of the Customer Care and Billing application.
- **Document Management Software:** Document Management Software that allows create and maintain paper or paperless documents and manage document workflow.

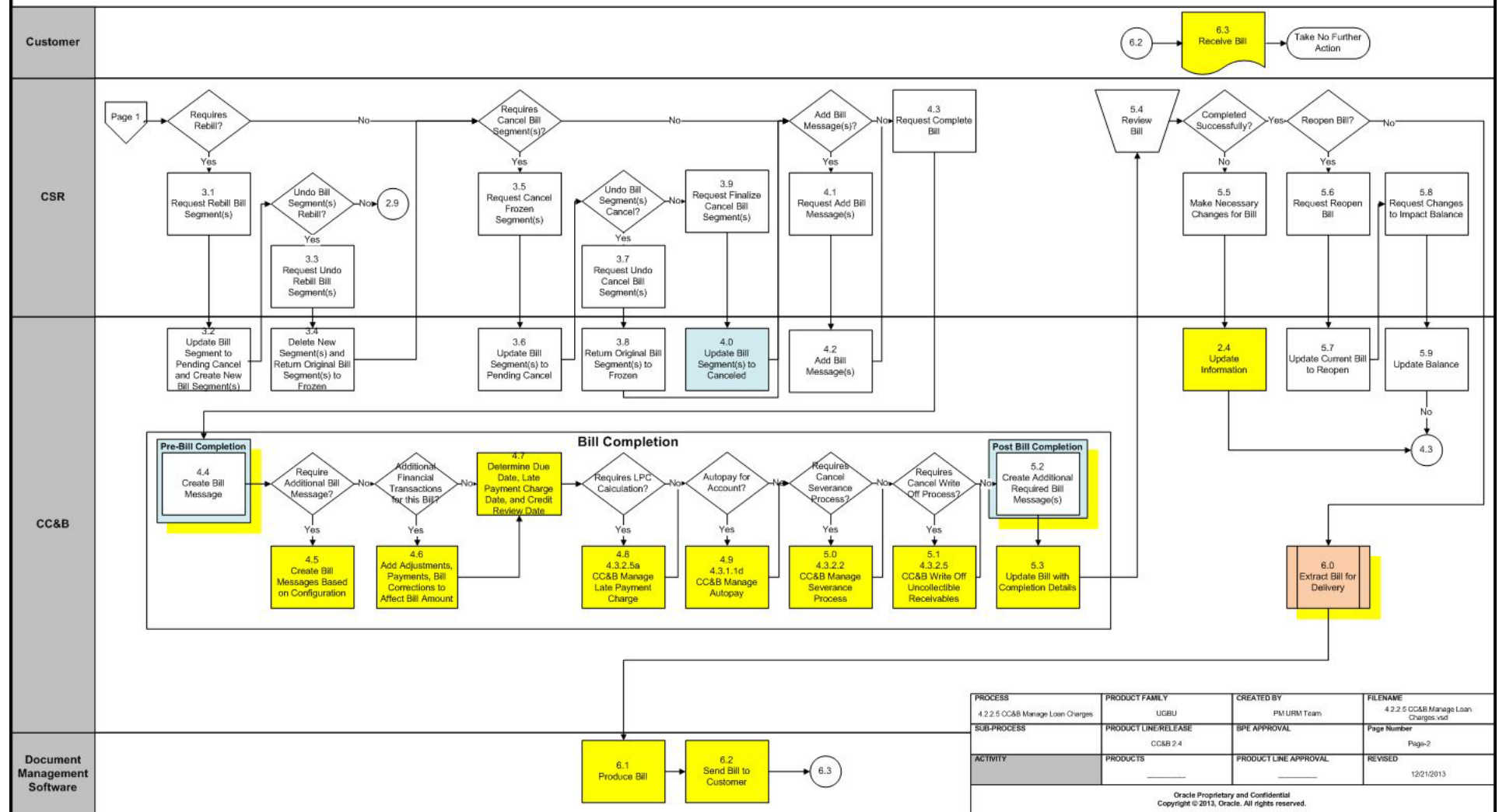
Business Process Diagrams

Manage Loan Charges Process Model - Page 1



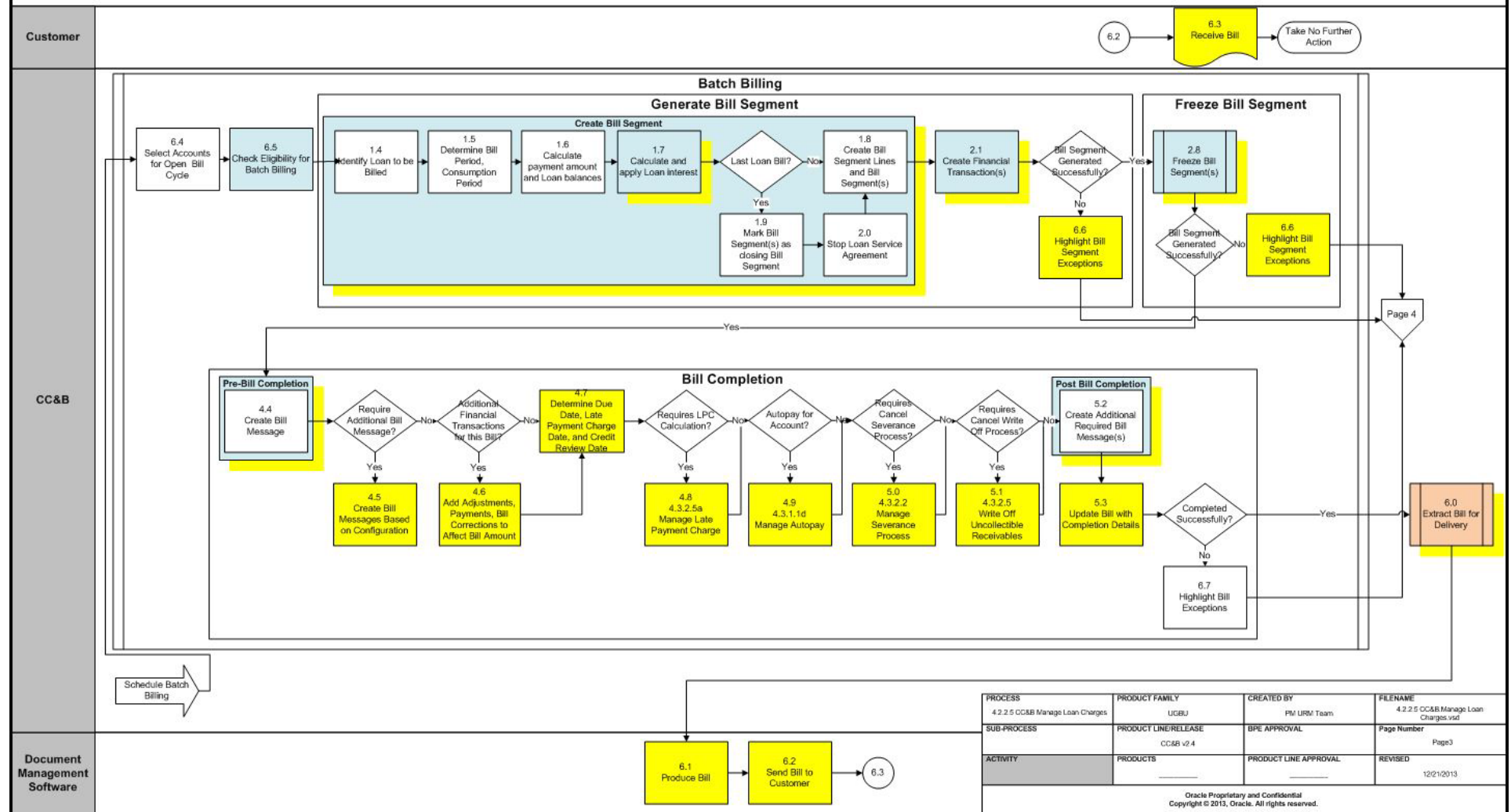
Manage Loan Charges Process Model - Page 2

4.2.2.5 CC&B v2.4 *Manage Loan Charges*

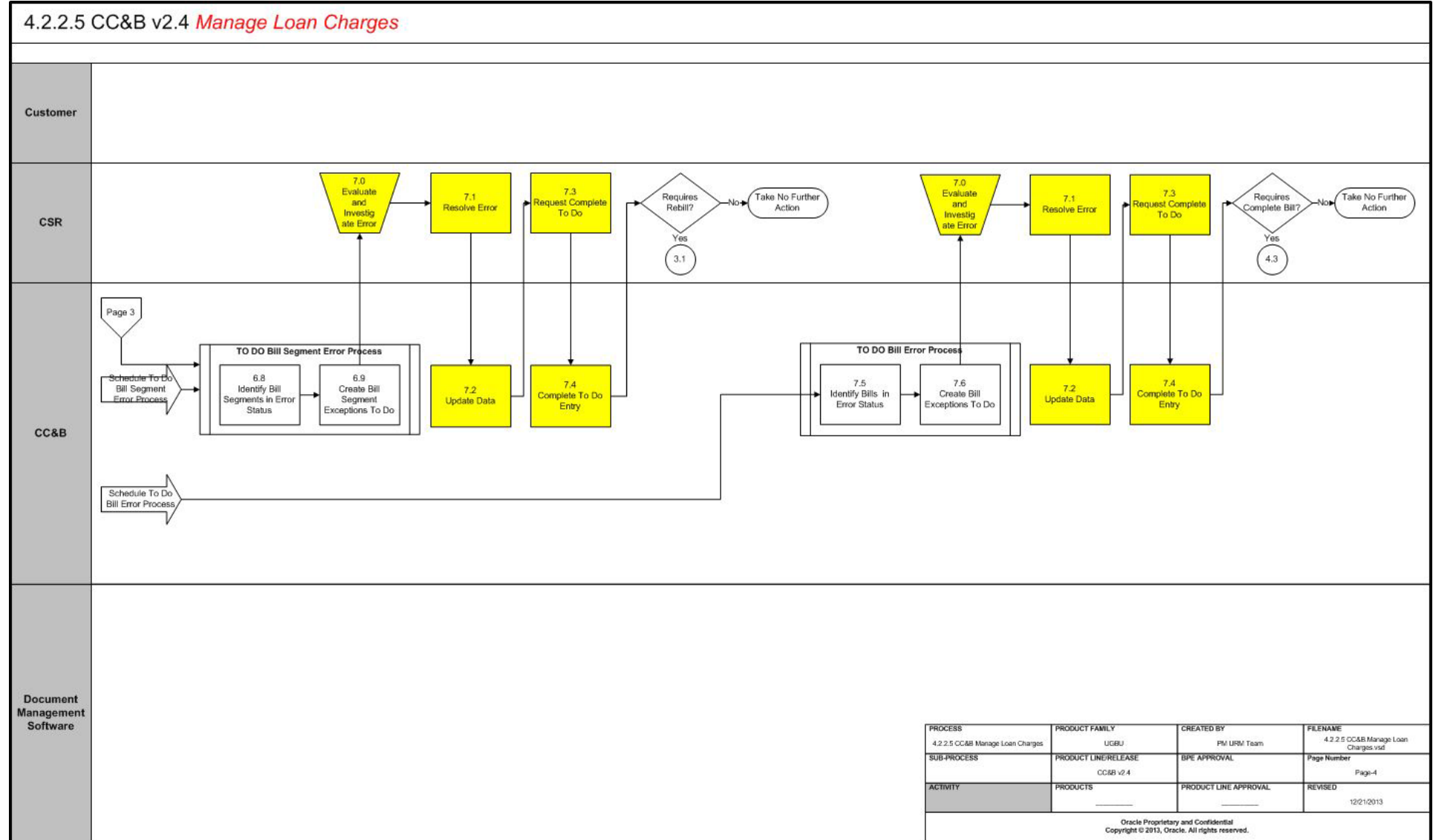


Manage Loan Charges Process Model - Page 3

4.2.2.5 CC&B v2.4 *Manage Loan Charges*



Manage Loan Charges Process Model - Page 4



Manage Loan Charges Detailed Process Model Description

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

- ♦ 1.0 Search for Customer
- ♦ 1.1 Evaluate Customer Account Eligibility for Bill
- ♦ 1.2 Enter Specific Data for Bill Segments Generation
- ♦ 1.3 Request Calculate New Bill Segments
- ♦ 1.4 Identify Loan to Be Billed
- ♦ 1.5 Determine Bill Period, Consumption Period
- ♦ 1.6 Calculate Payment Amount and Loan Balances Charges
- ♦ 1.7 Calculate and Apply Loan Interest
- ♦ 1.8 Create Bill Segments Lines and Bill Segments
- ♦ 1.9 Mark Bill Segments as Closing Bill Segment
- ♦ 2.0 Stop Loan Service Agreement
- ♦ 2.1 Create Financial Transactions
- ♦ 2.1.1 Format Online Presentation
- ♦ 2.2 Review Bill Segments
- ♦ 2.3 Request Changes for Calculation of Loan Bill
- ♦ 2.4 Update Information
- ♦ 2.5 Request Delete Bill
- ♦ 2.6 Delete Bill
- ♦ 2.7 Request Delete Specific Bill Segments
- ♦ 2.8 Delete Bill Segments
- ♦ 2.9 Request Freeze Bill Segments
- ♦ 3.0 Freeze Bill Segments
- ♦ 3.1 Request Re-Bill Bill Segments
- ♦ 3.2 Update Bill Segments to Pending Cancel and Create New Bill Segments
- ♦ 3.3 Request Undo ReBill Bill Segments
- ♦ 3.4 Delete New Segments and Return Original Bill Segments to Frozen
- ♦ 3.5 Request Cancel Frozen Bill Segments
- ♦ 3.6 Update Bill Segments to Pending Cancel
- ♦ 3.7 Request Undo Cancel Bill Segments
- ♦ 3.8 Return Original Bill Segments to Frozen
- ♦ 3.9 Request Finalize Cancel Bill Segments
- ♦ 4.0 Update Bill Segments to Canceled
- ♦ 4.1 Request Add Bill Messages
- ♦ 4.2 Add Bill Messages
- ♦ 4.3 Request Complete Bill
- ♦ 4.4 Create Bill Message
- ♦ 4.5 Create Bill Messages Based on Configuration
- ♦ 4.6 Add Adjustments, Payments, and Bill Corrections to Affect Bill Amount
- ♦ 4.7 Determine Due Date, Late Payment Charge Date, and Credit Review Date
- ♦ 4.8 4.3.2.5a CC&B Manage Late Payment Charge
- ♦ 4.9 4.3.1.1d CC&B Manage Autopay
- ♦ 5.0 4.3.2.2 CC&B Manage Severance Process
- ♦ 5.1 4.3.2.5 CC&B Write Off Uncollectible Receivables
- ♦ 5.2 Add Additional Required Bill Messages
- ♦ 5.3 Update Bill with Completion Details
- ♦ 5.4 Review Bill

- ♦ 5.5 Make Necessary Changes for Bill
- ♦ 5.6 Request Reopen Bill
- ♦ 5.7 Update Current Bill to Reopen
- ♦ 5.8 Request Changes to Impact Balance
- ♦ 5.9 Update Balance
- ♦ 6.0 Extract Bill for Delivery
- ♦ 6.1 Produce Bill
- ♦ 6.2 Send Bill to Customer
- ♦ 6.3 Receives Bill
- ♦ 6.4 Select Accounts for Open Bill Cycle
- ♦ 6.5 Check Eligibility for Batch Billing
- ♦ 6.6 Highlight Bill Segment Exceptions
- ♦ 6.7 Highlight Bill Exceptions
- ♦ 6.8 Identify Bill Segments in Error Status
- ♦ 6.9 Create Bill Segment Exceptions To Do
- ♦ 7.0 Evaluate and Investigate Error
- ♦ 7.1 Resolve Error
- ♦ 7.2 Update Data
- ♦ 7.3 Request Complete To Do
- ♦ 7.4 Complete To Do Entry
- ♦ 7.5 Identify Bills in Error Status
- ♦ 7.6 Create Bill Exceptions To Do

1.0 Search for Customer

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

Actor/Role: CSR

Description: Upon receipt of request or inquiry for Billing the CSR or Authorized User accesses Control Central Search to locate the customer in CC&B.

1.1 Evaluate Customer Account Eligibility for Bill

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

Actor/Role: CSR

Description: CC&B provides the CSR or Authorized User with valuable insight and overall analysis of the Customer's financial situation. The CSR or Authorized User evaluates the Customer's Account. Account Financial History, Premise and Service Agreement Billing History, Credit Rating, and Credit and Collection History may be reviewed. Control Central Alerts and other Dashboard information assist the CSR or Authorized User in determining eligibility for adding new Bill or any rebilling based on established business rules.

Available Algorithms

- [Installation Options - Control Central Alert Algorithms](#)

Entities to Configure

- Installation Options

1.2 Enter Specific Data for Bill Segments Generation

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

Actor/Role: CSR

Description: If the CSR or Authorized User identifies a need to create a Loan Bill for the customer, the CSR or Authorized User provides the system with information about the Billing period for the bill to be created. The CSR or Authorized User must specify Cutoff Date or Use Schedule to determine the end date of each Bill Segment Bill period. The Accounting Date defaults to current date however the CSR or Authorized User may change this date based on established business rules.

1.3 Request Calculate New Bill Segments

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

Actor/Role: CSR

Description: The Manual billing process consists of several steps. The first step is to request system to calculate and create the Bill and Bill Segment for the Loan. The CSR or Authorized User requests to generate a new online Bill. This online Bill may contain one or more segments. If only one Loan Service Agreement exists for the Account, then only one Loan Bill Segment is created.

Note: The “Generate” function is used when creating a new Bill, Bill Segment, or re-generating an existing freezable or error segment. A deleted Bill Segment may be generated again once information is changed.

1.4 Identify Loan to Be Billed

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

Group:

- Create Bill Segment
- Generate Bill Segment
- Batch Billing

Actor/Role: CC&B

Description: This task could be initiated from online and from batch billing.

- **Manual Process:** System identifies the specific Customer's loan based on the request criteria specified in step 1.2 of the current process.
- **Automated Process:** System identifies Customer's Loans that needs to be billed based on billing method specified for Loan. Typically all the loans that require billing when Bill window is “open” are selected.

Note: Typically loans are billed in advance and it's a common practice to use Future Anniversary Billing method for Companies to bill Loans. Loan Bill Segment creation does not allow for prorated Interest Rate - Bill Factor.

Available Algorithms

- BSBS-LO Algorithm Type
- C1-BSBS-LO Algorithm creates a bill segment for a loan SA

Process Names

- Billing - The Bill cycle Batch processing creates Bills and Bill Segments for accounts with an “open” Bill cycle.

Entities to Configure

- Bill Segment Type
- SA Types
- Customer Class
- Bill Cycle
- Bill Schedule

1.5 Determine Bill Period, Consumption Period

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

Group:

- Create Bill Segment
- Generate Bill Segment
- Batch Billing

Actor/Role: CC&B

Description: System identifies Bill Period and Consumption Period.

Available Algorithms

- BSBS-LO Algorithm Type - Create a bill segment for a loan SA
- C1-BSBS-LO Algorithm creates a bill segment for a loan SA

Process Names

- Billing - The Bill cycle Batch processing creates Bills and Bill Segments for accounts with an “open” Bill cycle.

Entities to Configure

- Bill Segment Type
- SA Types
- Customer Class

1.6 Calculate Payment Amount and Loan Balances Charges

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

Group:

- Create Bill Segment
- Generate Bill Segment
- Batch Billing

Actor/Role: CC&B

Description: CC&B makes appropriate calculations to determine Loan's payment amount that needs to be billed.

Available Algorithms

- BSBS-LO Algorithm Type - Create a bill segment for a loan SA
- C1-BSBS-LO Algorithm creates a bill segment for a loan SA

Process Names

- Billing

Entities to Configure

- Bill Segment Type
- SA Types
- Customer Class
- Bill Factor

1.7 Calculate and Apply Loan Interest

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

Group:

- Create Bill Segment
- Generate Bill Segment
- Batch Billing

Actor/Role: CC&B

Description: CC&B calculates and creates the Loan segment and applies interest to the Service Agreement. This step can be executed from online and batch processing.

Available Algorithms

- BSBS-LO Algorithm Type - Create a bill segment for a loan SA
- C1-BSBS-LO Algorithm creates a bill segment for a loan SA
- LINT-SI - Calculate Simple Interest for a Loan SA. The interest calculation is based on: 1) unbilled principal (i.e., the service agreement's payoff balance minus the current balance), 2) the number of billing periods covered by the bill, and 3) the interest rate.

Process Names

- Billing

Entities to Configure

- Bill Segment Type
- SA Types
- Bill Factor

1.8 Create Bill Segments Lines and Bill Segments

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

Group:

- Create Bill Segment
- Generate Bill Segment
- Batch Billing

Actor/Role: CC&B

Description: The system creates a bill segment and Bill Segment's Bill lines. One bill line shows the amount of interest in the payment (Line 1), and another bill line shows the amount of principal (2nd line).

Note: The principal amount is equal to the service agreement's periodic payment amount minus the amount of calculated interest.

This step can be executed from online and batch processing.

Available Algorithms

- BSBS-LO Algorithm Type - Create a bill segment for a loan SA
- C1-BSBS-LO Algorithm creates a bill segment for a loan SA

Process Names

- Billing

Entities to Configure

- Bill Segment Type
- SA Type

1.9 Mark Bill Segments as Closing Bill Segment

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

Group:

- Create Bill Segment
- Generate Bill Segment
- Batch Billing

Actor/Role: CC&B

Description: If generated Bill Segment is a last Loan bill, CC&B marks Bill Segment as closing Bill Segment.

Note: CC&B consider bill segment as last Bill Segment for Loan if the remaining principal balance (plus accrued interest) is less than or equal to the loan payment amount.

Process Names

- Billing

2.0 Stop Loan Service Agreement

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

Group:

- Create Bill Segment
- Generate Bill Segment
- Batch Billing

Actor/Role: CC&B

Description: If generated Bill Segment is a last loan bill, CC&B initiates stop SA process for Loan Service Agreement and changes the status of Loan SA to Pending Stop.

Note: The Loan SA can then be stopped by the user or by the SA activation background process (See process 3.3.2.4 CC&B Stop Non-Premise-Based Service for details).

Process Names

- Billing

2.1 Create Financial Transactions

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

Group:

- Generate Bill Segment
- Batch Billing

Actor/Role: CC&B

Description: CC&B creates the associated financial details related to the Bill Segment. The Financial Transaction contains the financial effects of the Bill Segment on the Service Agreement's current and payoff balances and on the General Ledger. This step can be executed from online and batch processing.

Available Algorithms

- BSBF-LO Algorithm Type - $\text{Payoff Amt} = \text{Interest} / \text{Current Amt} = \text{Bill Amount}$.
- C1-BSBF-LO - This bill segment financial transaction algorithm creates financial transactions for a loan service agreement

Process Names

- Billing

Entities to Configure

- Bill Segment Type
- SA Type

2.1.1 Format Online Presentation

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

Actor/Role: CC&B

Description: Formatting information to be presented Online.

Available Algorithms

- C1-BSI-INFO - Algorithm Type

- CI_BSI-STD - This algorithm formats the "Bill Segment Information" that appears throughout the system. It concatenates the fields and delimiters specified as algorithm parameters.
- C1-BST-INFO - Algorithm Type
- CI_BST-NSAID - This algorithm formats the "Bill Segment Information" that appears throughout the system. It concatenates the fields and delimiters specified as algorithm parameters.

Process Names

- Billing

Entities to Configure

- Bill Segment Type - Bill Segment Information
- Installation Options - Framework- Bill Segment Information

2.2 Review Bill Segments

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

Actor/Role: CSR

Description: The CSR or Authorized User reviews the Bill Segment for accuracy and determines the next action. The CSR or Authorized User decides if the billing process could be continued. The Bill Segment may be incorrect, or created by mistake and needs to be deleted, rebilled or canceled.

Business Objects

- WX-Bill - Bill business object (simple bill elements only): This business object is used for simple access to bill information.
- CI_BillSegmentRead - This business object is used to read the details related to a bill segment.
- CI_BillSegmentStatus - Bill Segment Status: This business object is used to retrieve the status of a bill segment.

2.3 Request Changes for Calculation of Loan Bill

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

Actor/Role: CSR

Description: After review CSR or Authorized User identifies a problem with the generated Loan Bill segment. The CSR or Authorized User, based on established business rules, then adds or changes the data used for the Bill Segment calculation. Typical changes for a Loan Service Agreement may include a change to dates or recurring charge information.

2.4 Update Information

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

Actor/Role: CC&B

Description: Changes by the CSR or Authorized User are updated in CC&B.

2.5 Request Delete Bill

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

Actor/Role: CSR

Description: During the review process it is determined the Bill Segment was created incorrectly or by mistake. Based on established business rules CSR or Authorized User requests to delete the Bill or Bill Segment. When a Bill has only one segment the Bill and the corresponding segment are deleted at the Bill level.

2.6 Delete Bill

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

Actor/Role: CC&B

Description: The Bill is deleted in CC&B and the financial records are removed from the database. There is no financial impact to the Customer's Account.

2.7 Request Delete Specific Bill Segments

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

Actor/Role: CSR

Description: The CSR or Authorized User determines specific Billable Charge Bill Segments associated with a given Bill need to be deleted.

2.8 Delete Bill Segments

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

Actor/Role: CC&B

Description: The specific Bill Segments is deleted in CC&B and the financial records are removed from the database. There is no financial impact to the Customer's Account.

2.9 Request Freeze Bill Segments

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

Actor/Role: CSR

Description: If CSR or Authorized User does not identify any problem and decides to continue the Billing process, he/she requests to Freeze the Bill Segment.

3.0 Freeze Bill Segments

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

Group:

- Freeze Bill Segment
- Batch Billing

Actor/Role: CC&B

Description: The Bill Segments and associated Financial Transaction are frozen in CC&B. The Bill Freeze Option on the Installation Options controls when a Service Agreement's balance and General Ledger is affected by the Bill Segment and must be configured to meet the organization's accounting practices.

- **Manual Process:** This is initiated by CSR or Authorized User when he/she requests to Freeze Bill Segments created for the Service Agreement.
- **Automated Process:** This is a component of batch billing process and gets executed as a part of scheduled batch billing process that runs periodically. Functionality is the same as described in Manual process.

Available Algorithms

- BSFZ-Empty - Bill Segment freeze/cancel sample algorithm.

Process Names

- Billing

Entities to Configure

- Installation Options - Bill Freeze Options
- Customer Class
- SA Type

3.1 Request Re-Bill Bill Segments

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CSR

Description: If the problem identified in the frozen Bill Segment has been resolved, the CSR or Authorized User requests to Cancel and Rebill the Bill Segment.

Entities to Configure

- Bill Cancel Reasons

3.2 Update Bill Segments to Pending Cancel and Create New Bill Segments

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: The original Bill Segments is updated to Pending Cancel, and new Bill Segments created. A new Financial Transaction is associated with the new Bill Segment and the original Financial Transaction is in the pending Cancel state.

Entities to Configure

- Bill Cancel Reasons

3.3 Request Undo ReBill Bill Segments

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User determines not to freeze the new Bill Segments. If the undo function is used, the newly generated segment is deleted.

3.4 Delete New Segments and Return Original Bill Segments to Frozen

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: CC&B deletes the newly generated segment and returns the original Bill Segment to frozen. There is no impact to Financial Transactions.

3.5 Request Cancel Frozen Bill Segments

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CSR

Description: The Bill Segments may need to be canceled and not created again. The customer's balance should not be impacted by the original transaction. The CSR or Authorized User initiates the Cancel function.

Entities to Configure

- Bill Cancel Reasons

3.6 Update Bill Segments to Pending Cancel

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: When the CSR or Authorized User requests Initiate Cancel, the system updates the Bill Segments to Pending Cancel.

Entities to Configure

- Bill Cancel Reasons

3.7 Request Undo Cancel Bill Segments

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User has the option to undo the pending Cancel Bill Segments. Prior to the cancellation the CSR or Authorized User determines the Bill Segments should not be canceled, and uses the Undo function.

3.8 Return Original Bill Segments to Frozen

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: The original Bill Segments is returned to Frozen in CC&B. There is no impact to financial transactions.

3.9 Request Finalize Cancel Bill Segments

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User confirms the cancellation of Bill Segments.

Entities to Configure

- Cancel Reasons

4.0 Update Bill Segments to Canceled

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: The existing Bill Segments is updated to Canceled status in CC&B. If a Bill Segment is cancelled, another Financial Transaction is created to reverse the original Financial Transaction. The cancellation Financial Transaction appears on the next Bill produced for the account as a Bill correction.

Available Algorithms

- BSFZ-Empty - This is a Customer Class Bill Segment freeze/cancel algorithm.

Entities to Configure

- Installation Options - Bill Freeze Options
- Customer Class

4.1 Request Add Bill Messages

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User may add Loan Service Agreement related Bill Messages for a given Bill Segments. The CSR or Authorized User may also add Bill Messages at the Account Level. The CSR or Authorized User adds these Bill Messages for an online Bill.

Entities to Configure

- Bill Messages

4.2 Add Bill Messages

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: The Bill Message is added to the bill in CC&B.

4.3 Request Complete Bill

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CSR

Description: When CSR or Authorized User cannot find any problem with Frozen Loan Bill Segment as well as with other Bill Segments (if any) that belong to the same bill, he/she initiates the Complete Bill function.

4.4 Create Bill Message

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Group:

- Pre-Bill Completion
- Bill Completion
- Batch Billing

Actor/Role: CC&B

Description: Bill Completion is the last and one of the most critical components of the Billing process. The system completes the Bill and it's ready for extract and print. This process could be initiated manually and automatically. CC&B makes use of Pre-Bill Completion algorithms. Based on configuration, one such algorithm can delete Bill Segments in error, create Bill messages for the deleted segments, and create a To Do entry.

- **Manual Process:** Based on configuration, additional Bill Messages can be added
- **Automated Process:** (Batch billing) If required, such algorithms can:
 - Delete Bill Segments in error, create Bill messages for the deleted segments, and create a To Do entry
 - Delete bill certain type of financial transactions linked to the bill, for example, if only payments exist for newly created Bill
 - Evaluate LPC eligibility
 - Evaluate option to post frequent flier miles

Available Algorithms

- DEL-BSEG -This Bill pre-completion algorithm deletes Bill Segments that are in Error.
- CPBC-DB - Pre-bill completion algorithm determines to delete a bill if it only contains frozen financial transactions of given types.
- C1-CPBC-TAXT - This customer class pre-bill completion algorithm checks if taxes should be charged by comparing the bill's accumulated tax amount with the tax threshold amount.
For v2.3.1, this algorithm was enhanced to accumulate not only bill segment calc amounts, but also the adjustment calc amounts prior to comparing the total to the threshold amount; and if required, both bill segments and adjustments are re-generated.
- C1-SUP-PR-BL - Suppress Printing Bills After Final Bill
- CI_CN-BRT - Suppress Bill Routings for credit notes
- CI_CN-RADJ - Reverse Adjustments When Creating Credit Note
- UNITEDMILES - Add United frequent flier miles
- DELTAFFMILES - Add Delta frequent flier miles

Process Names

- Billing

Entities to Configure

- To Do Type
- To Do Role
- Bill Message
- SA Type
- Customer Class

Business Objects

- C1-AccountBillMessage - Account Bill Message

4.5 Create Bill Messages Based on Configuration

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Group:

- Bill Completion
- Batch Billing

Actor/Role: CC&B

Description: CC&B can also automatically add Bill Messages during Bill completion. Bill Messages come from a variety of sources:

- Account Bill Messages
- Customer Class Bill Messages
- Service Agreement related Messages that are linked to Bill Segments
- Rate Schedule Bill Messages
- Service Provider Bill Messages
- Meter Reader Remark Bill Messages
- Ad hoc Messages by CSR or Authorized User
- Custom Background Processes and Algorithm Bill Messages

This step can be initiated from online or billing batch process.

Process Names

- Billing

Entities to Configure

- Customer Class Bill Messages
- Rate Schedule Bill Messages
- Meter Reader Remark Bill Messages
- Account and Service Agreement Bill Messages

Business Objects

- C1-AccountBillMessage - Account Bill Message

4.6 Add Adjustments, Payments, and Bill Corrections to Affect Bill Amount

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Group:

- Bill Completion
- Batch Billing

Actor/Role: CC&B

Description: During Bill Completion CC&B adds Adjustments, Payments or Bill corrections not included in the previous Bills to the newly created Bill. This step can be executed from online and batch processing.

Process Names

- Billing

4.7 Determine Due Date, Late Payment Charge Date, and Credit Review Date

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Group:

- Bill Completion
- Batch Billing

Actor/Role: CC&B

Description: During Bill Completion the Due Date, Late Payment Charge Date, and next Credit Review Date are determined and made available as information for the Bill and Account. Some Companies require Late Payment Charges calculated and added to the Bill. If this is the case, the system allows doing so. Two algorithms are listed below for information only. This step can be executed from online and batch processing.

Available Algorithms

- BILPC-TOTAL - This Algorithm Type calculate the late payment charge amount for a specific service agreement linked to an account.
- BILPE-ALL -used during the late payment charge background process to determine if an account is eligible for late payment charges.

Process Names

- Billing

Entities to Configure

- SA Type
- Customer Class
- Adjustment Types

4.8 4.3.2.5a CC&B Manage Late Payment Charge

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Group:

- Bill Completion

- Batch Billing

Actor/Role: CC&B

Description: Late Payment Charges may be calculated during Bill Completion. Refer to 4.3.2.5a CC&B Manage Late Payment Charge.

Process Names

- Billing - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle.

4.9 4.3.1.1d CC&B Manage Autopay

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Group:

- Bill Completion
- Batch Billing

Actor/Role: CC&B

Description: An Autopay payment may be created during Bill Completion. Refer to 4.3.1.1d CC&B Manage Autopay.

Process Names

- Billing - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle.

5.0 4.3.2.2 CC&B Manage Severance Process

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Group:

- Bill Completion
- Batch Billing

Actor/Role: CC&B

Description: The status of a Severance Process can change due to Bill Completion. Refer to 4.3.2.2 CC&B Manage Severance Process.

Process Names

- Billing - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle.

5.1 4.3.2.5 CC&B Write Off Uncollectible Receivables

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Group:

- Bill Completion
- Batch Billing

Actor/Role: CC&B

Description: The status of a Write Off Process or Write Off SA can change due to Bill Completion. Refer to 4.3.2.5 CC&B Write Off Uncollectible Receivables.

Process Names

- Billing - The Bill cycle Batch processing creates Bills for accounts with an "open" Bill cycle.

5.2 Add Additional Required Bill Messages

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Group:

- Post Bill Completion Activity
- Bill Completion
- Batch Billing

Actor/Role: CC&B

Description: CC&B can perform various post Bill completion activities. One example is to recreate Adjustments after a Credit Note is completed. This step can be executed from online and batch processing.

Available Algorithms

- C1-CN-ADNB - This customer class post Bill completion algorithm recreates adjustments after a credit note is completed.
- WX-SSBNOTIFY - This customer class post Bill completion algorithm set Bill Notifications for Self-Service
- C1-CR-BLRVWS - This customer class post Bill completion algorithm create Bill Review Schedule
- C1-MULT-DUDT - This customer class post Bill completion algorithm Additional Bill Due Dates

Process Names

- Billing

Entities to Configure

- SA Type
- Customer Class
- Adjustment Types

5.3 Update Bill with Completion Details

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Group:

- Bill Completion
- Batch Billing

Actor/Role: CC&B

Description: All Bill completion details are now updated in CC&B.

Process Names

- Billing

5.4 Review Bill

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User evaluates the Account and reviews the Bill for accuracy. At times it may be necessary to reopen the most recent Bill. Possibly a payment or adjustment was not included in the original Bill. A Bill Segment may need rebilling and the changes should be reflected in a new Bill.

Business Objects

- WX-Bill - Bill business object (simple bill elements only): This business object is used for simple access to bill information.
- WX-BillSegment - This business object is used to read the details related to a bill segment.
- CI_BillSegmentRead - Details related to Bill Segment Reads.
- CI_BillSegmentStatus - Bill Segment Status: This business object is used to retrieve the status of a bill segment.

5.5 Make Necessary Changes for Bill

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CSR

Description: During Bill Completion information may be missing or incomplete. One example is the mailing address may be missing. The CSR or Authorized User reviews and resolves the error, enters correct data, and completes the Bill as needed.

5.6 Request Reopen Bill

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User determines to reopen a Bill for the Customer's account.

5.7 Update Current Bill to Reopen

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: The current Bill is reopened in CC&B and available for applicable changes.

5.8 Request Changes to Impact Balance

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CSR

Description: Based on investigation and established business rules, the CSR or Authorized User requests various changes that impact the balance. Typically these changes can be: creation of a new Bill Segment, Rebill of a Bill Segment, Cancellation of a Bill Segment, Creation of a Payment, Adjustment, Cancellation of a Payment, or Adjustment.

5.9 Update Balance

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: The financial balance is updated in CC&B.

6.0 Extract Bill for Delivery

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: CC&B

Description: Typically CC&B prepares required billing data and makes data available for the Document Management application.

Note: An additional custom process may be created to interface with the Document Management Software as needed.

Available Algorithms

- Bill Route Type - BLEX-EX - This algorithm constructs the records that contain the information that appears on a printed Bill (Documaker or Doc 1).
- C1-BLEX-CR - This Bill Route Type extract algorithm prepares the report information needed to create a Bill using a Reporting Engine.

Process Names

- POSTROUT - CIPBXBLB - The bill print process creates the flat file that is interfaced to your bill print software.
- Custom Extract Process

Business Objects

WX-BillRouteType - Bill business object to read bill routing details.

Note: This BO is currently used for reprint Bills.

- C1-BillRouteTypePhysicalBO - Physical BO for Bill Route Type

6.1 Produce Bill

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: Document Management Software

Description: Document Management Software reads and process bill information produced by CC&B. It prints actual bills or prepare bills in another format (e-mail, PDF online format, short message service (SMS)).

6.2 Send Bill to Customer

Reference: [Manage Loan Charges Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: Document Management Software

Description: The printed Bill is sent or made available for the Customer.

6.3 Receives Bill

Reference: [Manage Loan Charges Process Model - Page 3 on page 5](#) for the associated business process diagram.

Actor/Role: Customer

Description: The Customer receives the Bill.

Entities to Configure

- Bill Route Type

6.4 Select Accounts for Open Bill Cycle

Reference: [Manage Loan Charges Process Model - Page 3 on page 5](#) for the associated business process diagram.

Group:

- Bill Completion
- Batch Billing

Actor/Role: CC&B

Description: This step is the first step of batch billing process. Using the established Bill Cycle Schedule, CC&B selects Accounts defined within a specific Open Bill Cycle. The Bill Cycle's schedule controls when the system attempts to create Bills for the account. It's recommended to configure one day Window Billing if Loan should be billed.

Process Names

- Billing

Entities to Configure

- Bill Cycle
- Account

6.5 Check Eligibility for Batch Billing

Reference: [Manage Loan Charges Process Model - Page 3 on page 5](#) for the associated business process diagram.

Group:

- Bill Completion
- Batch Billing

Actor/Role: CC&B

Description: Normally, most Bills are created and completed automatically. At Billing time, CC&B attempts to produce a Bill for an account and create one or more Bill Segments for every non-cancelled / non-closed service agreement linked to the account. CC&B evaluates Account, Loan Service Agreement and eligibility for billing. This step is executed form the batch process only.

Available Algorithms

- C1-SKIPINACC -stops processing an account if all the following conditions are true: - There are no Billable service agreements - There are no eligible Financial Transactions for the Bill - There are no temporary account messages to be swept onto the Bill.

Process Names

- Billing

Entities to Configure

- SA Type
- Customer Class

6.6 Highlight Bill Segment Exceptions

Reference: [Manage Loan Charges Process Model - Page 4 on page 6](#) for the associated business process diagram.

Group:

- Create Bill Segment
- Freeze Bill Segment
- Batch Billing

Actor/Role: CC&B

Description: If a Bill Segment cannot be created, CC&B creates a Bill Segment in “error” status with a message can be analyzed by a CSR or Authorized User.

Typically errors are caused by missing or incomplete data. The error may be reviewed at this time or not. Data may be changed before Batch Billing next runs. When the Batch Billing process next runs, it deletes all “error” Bill Segments and attempts to recreate them. It continues this throughout the Bill window. If a Bill Segments is in error at the end of the Bill window, a user must intervene and fix them. If the Bill Segments is still in error when the cycle's next window opens, a Billing error is generated. This step can be executed from batch only.

Process Names

- Billing

6.7 Highlight Bill Exceptions

Reference: [Manage Loan Charges Process Model - Page 4 on page 6](#) for the associated business process diagram.

Group:

- Bill Completion
- Batch Billing

Actor/Role: CC&B

Description: If a Bill cannot be completed, CC&B creates a Bill in “error” status with a message that is analyzed by a CSR or Authorized User. Typically errors are caused by missing or incomplete data.

Process Names

- Billing

6.8 Identify Bill Segments in Error Status

Reference: [Manage Loan Charges Process Model - Page 4 on page 6](#) for the associated business process diagram.

Group: TO DO Bill Segment Error Process

Actor/Role: CC&B

Description: CC&B identifies Bill Segments in error status. CC&B can create a To Do Entry for every Bill Segment in error status.

Process Names

- TD-BSERR- This background process creates a To Do entry for every Bill Segment that's in error.

Entities to Configure

- To Do Role
- To Do Type

6.9 Create Bill Segment Exceptions To Do

Reference: [Manage Loan Charges Process Model - Page 4 on page 6](#) for the associated business process diagram.

Group: TO DO Bill Segment Error Process

Actor/Role: CC&B

Description: CC&B can create a To Do Entry for every Bill Segment in error status. The To Do functionality allows for online review by a user or group of users. To Do Lists summarize and total entries for different To Do Types. Status of To Do Entries is available for evaluation.

Process Names

- TD-BSERR- This background process creates a To Do entry for every Bill Segment that's in error.

Entities to Configure

- To Do Role
- To Do Type

7.0 Evaluate and Investigate Error

Reference: [Manage Loan Charges Process Model - Page 4 on page 6](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User will review the Bill Segment error and supporting information in CC&B. Account, Service Agreement, and Billing History are some of the areas reviewed. Typically errors are caused by missing or incomplete information. Based on established business rules, the CSR or Authorized User investigates possible solutions or workarounds for the missing or incomplete information.

7.1 Resolve Error

Reference: [Manage Loan Charges Process Model - Page 4 on page 6](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User resolves the error and enters information in CC&B.

7.2 Update Data

Reference: [Manage Loan Charges Process Model - Page 4 on page 6](#) for the associated business process diagram.

Actor/Role: CC&B

Description: Information required for resolution is updated in CC&B.

7.3 Request Complete To Do

Reference: [Manage Loan Charges Process Model - Page 4 on page 6](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User marks the To Do Entry as complete and requests completion of the To Do Entry. The CSR or Authorized User may add comments or a log entry for future reference.

7.4 Complete To Do Entry

Reference: [Manage Loan Charges Process Model - Page 4 on page 6](#) for the associated business process diagram.

Actor/Role: CC&B

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

7.5 Identify Bills in Error Status

Reference: [Manage Loan Charges Process Model - Page 4 on page 6](#) for the associated business process diagram.

Group: TO DO Bill Error Process

Actor/Role: CC&B

Description: CC&B identifies Bills in error status. CC&B can create a To Do Entry for every Bill in error status.

Process Names

- TD-BIERR - This background process creates a To Do entry for every Bill that's in error.

Entities to Configure

- To Do Role
- To Do Type

7.6 Create Bill Exceptions To Do

Reference: [Manage Loan Charges Process Model - Page 4 on page 6](#) for the associated business process diagram.

Group: TO DO Bill Error Process

Actor/Role: CC&B

Description: CC&B can create a To Do Entry for every Bill in error status. The To Do functionality allows for online review by a user or group of users. To Do Lists summarize and total entries for different To Do Types. Status of To Do Entries is available for evaluation.

Process Names

- TD-BIERR - This background process creates a To Do entry for every Bill that's in error.

Entities to Configure

- To Do Role
- To Do Type

At times the organization is made aware of a possible anomaly with a particular Batch of Bills. There are two background processes for canceling or reopening an entire batch of Bills. Refer to 4.2.2.2 Manage Metered Charges.

Installation Options - Control Central Alert Algorithms

The following installation options are available:

Value	Description
CCAL-WF	Account or Premise linked to Active Workflow Process
CCAL-TD	Highlight outstanding To Do entries
CCAL-DECL	Highlight Effective Declarations for Acct and Prem
CCAL-CASE	Highlight cases
PP BY STATUS	Count pay plans
C1-CASH-ACCT	Highlight Cash Only Account
C1-CCAL-CLM	Highlight Open Rebate Claims
C1-COLL-REF	Highlight Active Collection Referral
C1-COLLPR-AC	Highlight Active Collection Process
C1-CRRT-ACCT	Highlight Credit Rating
C1-LSSL-PER	Highlight Person Life Support/Sensitive Load
C1-LSSL-PRM	Highlight Premise Life Support/Sensitive Load
C1-PEND-STRT	Highlight Pending Start
C1-SEVPR-ACT	Highlight Active Severance Processes
CCAL-FAERMSG	Highlight FAs with outstanding outgoing messages
C1-OD-PROC	Highlight Active Overdue Processes
C1-OPN-MEVT	Highlight Open and Disputed Match Events
C1-STOP-SA	Highlight Stopped SAs
C1-WO-BILL	Highlight Written Off Bills
C1-CCAL-OCBG	Highlight Open Off Cycle Bill Generators
CC BY TYPCL	Count number of customer contacts
C1-STASKALRT	Retrieve Open Service Tasks
C1-STSKALSAC	Service Task Alert By SA Characteristic
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