



C2M.v2.7.CCB

3.3.2.3 Stop Premise Based Service

Creation Date: March 8, 2009
Last Updated: February 11, 2020

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Brief Description

Business Process: 3.3.2.3 C2M.CCB.Stop Premise Based Service
Process Type: Sub Process
Parent Process: 3.3.2 C2M.CCB.Manage Service Agreement
Sibling Processes: 3.3.3.1 C2M.CCB.Refund Deposit, 3.4.4.3a C2M.CCB.Cancel Budget, 3.4.4.3b C2M.CCB. Expire Non-Billed Budget, 4.2.2 C2M.CCB. Manage Bill, 4.3.1.1 C2M.CCB. Manage Payments, 4.3.2.1 C2M.CCB. Manage Collection Process, 4.3.2.2 C2M.CCB.Manage Severance Process, 3.3.2.1 C2M.CCB. Start Premise Based Service, 3.3.2.4 C2M.CCB. Stop Non-Premise Based Service, 3.3.6.3 C2M.CCB. Stop Premise Based Service for Landlord-Tenant, 4.1.1.1 C2M.CCB. Manage Adjustment

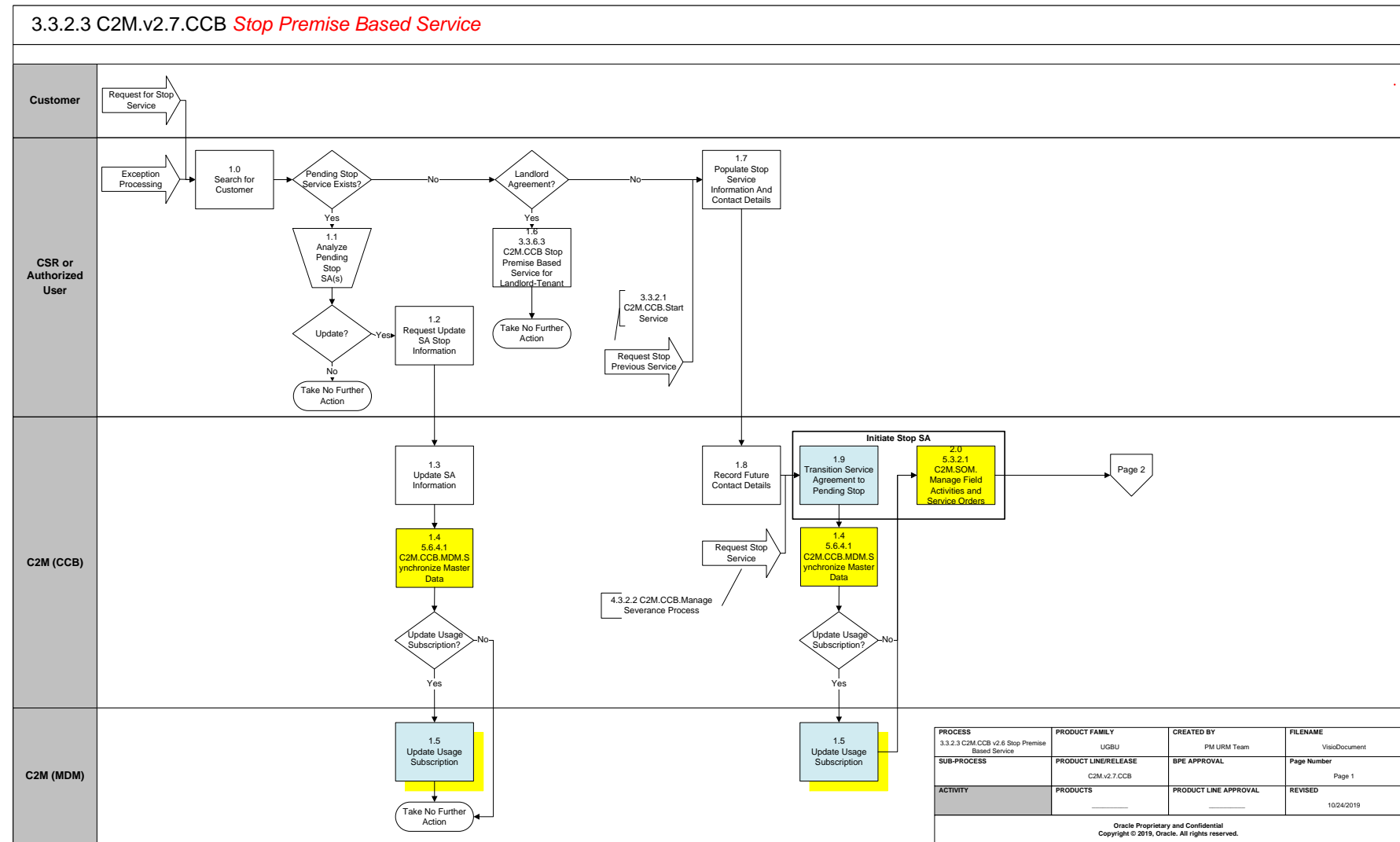
This process describes the typical Stop Service processing for a service related to Service Points. In the Stop Service process, the relationship with the Customer's service at the given Service Point is terminated.

The request to Stop Service could result from a:

- Customer request, if for example the Customer is moving out.
- Start Service for a new or existing Customer where a Stop Service is created automatically. Refer to 3.3.2.1 C2M.CBB.Start Premise Based Service for details.
- A cut for non-payment. Refer to 4.3.2.2 C2M.CCB.Manage Severance Process for details.

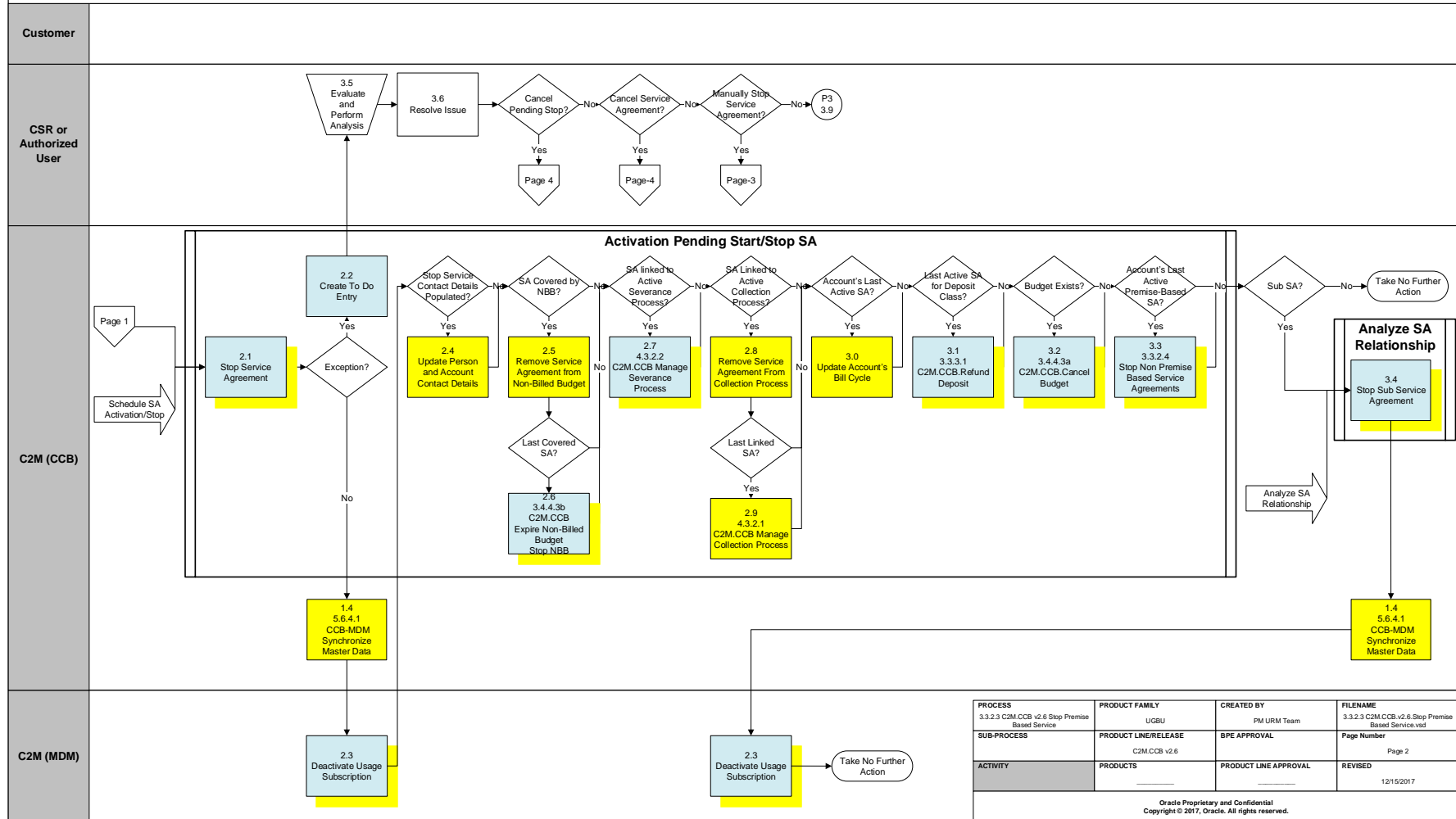
This process also covers reactivation and reinstatement of closed Service Agreements.

Business Process Model Page 1

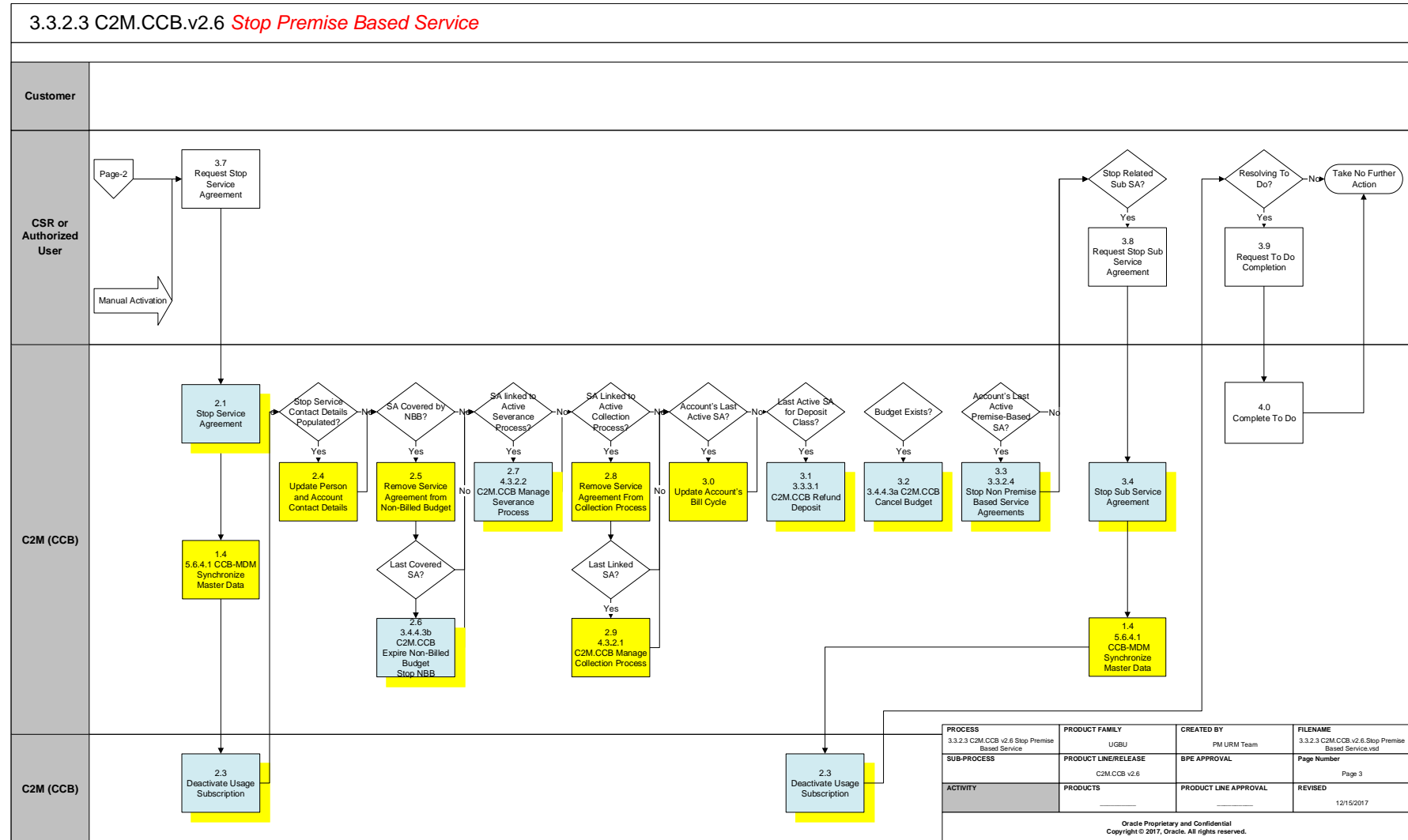


Business Process Model Page 2

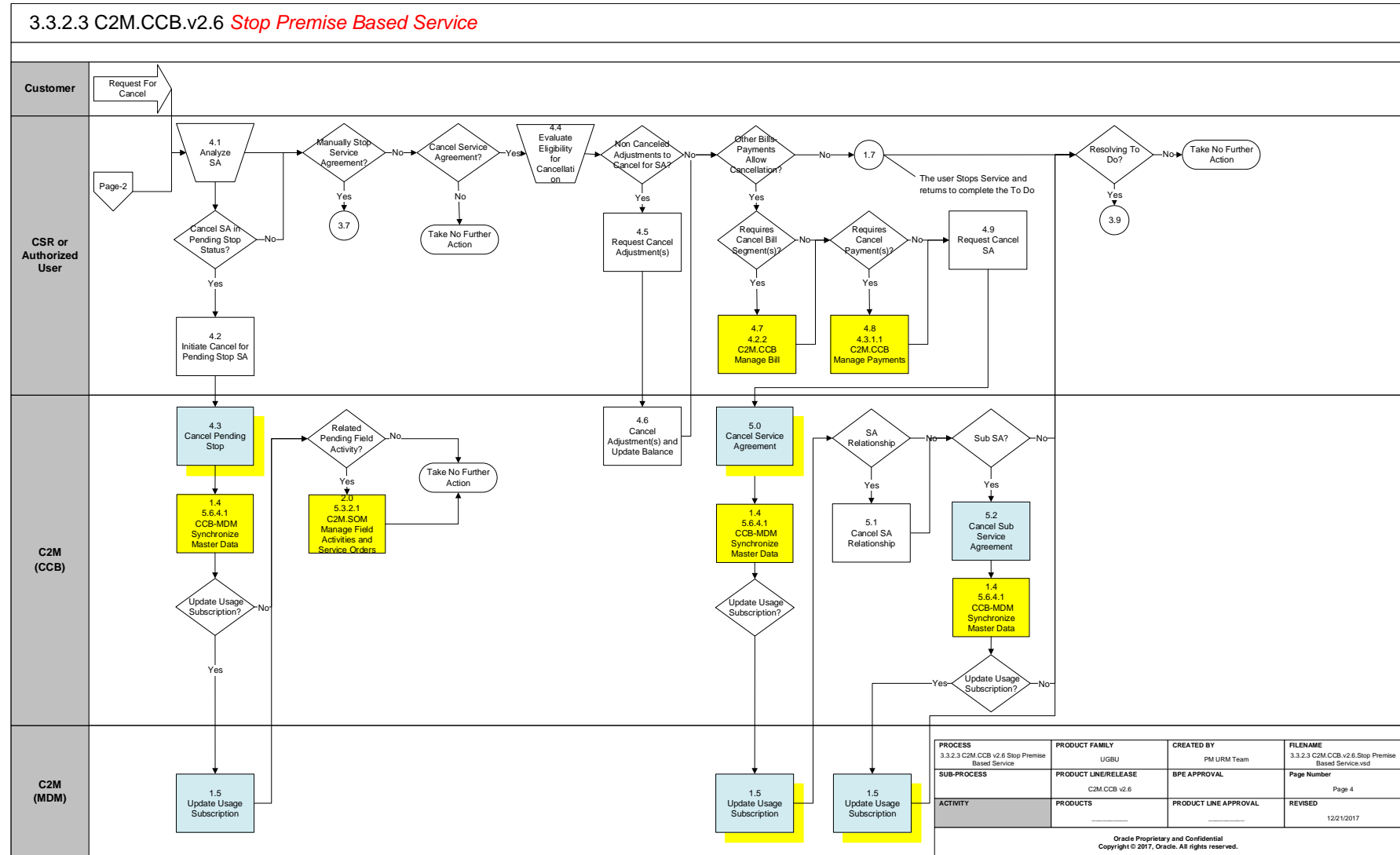
3.3.2.3 C2M.CCB.v2.6 Stop Premise Based Service



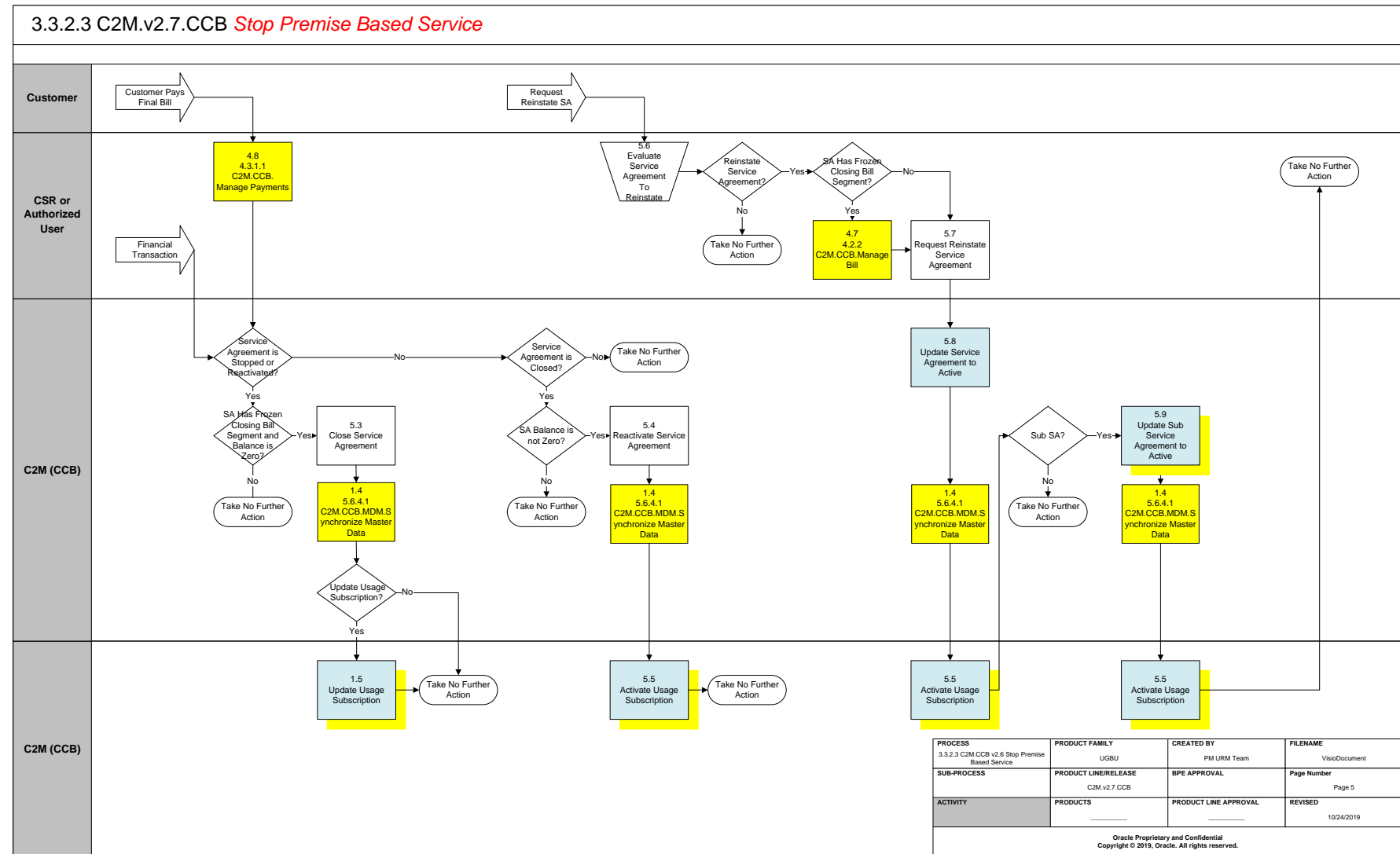
Business Process Model Page 3



Business Process Model Page 4



Business Process Model Page 5



Detail Business Process Model Description

1.0 Search for Customer

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User locates the customer in C2M (CCB) using [Control Central Search](#). When a customer is selected, the CSR or Authorized User is automatically transferred to Control Central – Account Information which displays information about the selected customer. [Dashboard Alerts](#) provide the CSR or Authorized User with key information about the customer including an alert if there are any Pending Stops.

1.1 Analyze Pending Stop SA(s)

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User analyzes the existing Pending Stop [Service Agreement](#)(s) to determine if any updates are required.

1.2 Request Update SA Stop Information

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User enters the changes to the Service Agreement information.

1.3 Update SA Information

Actor/Role: C2M (CCB)

Description

The pending Service Agreement is updated in C2M (CCB).

1.4 5.6.4.1 CCB-MDM Synchronize Master Data

Actor/Role: C2M (CCB) and C2M (MDM)

Description:

Changes to a service agreement may impact a related usage subscription, refer to 5.6.4.1 CCB-MDM Synchronize Master Data for details.

1.5 Update Usage Subscription

Actor/Role: C2M (MDM)

Description:

The Synchronize Master Data process updates the usage subscription.

1.6 3.3.6.3 C2M.CCB.Stop Premise Based Service for Landlord-Tenant

Actor/Role: CSR or Authorized User

Description:

Refer to Process 3.3.6.3 C2M.CCB.Stop Premise Based Service for Landlord-Tenant.

1.7 Populate Stop Service Information And Contact Details

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User gathers the information required to initiate the stop process. The CSR or Authorized User enters the desired stop date and selects the Service Agreements to stop. If required the CSR or Authorized enters the bill routing and contact information to be used after the stop has occurred.

1.8 Record Future Contact Details

Actor/Role: C2M (CCB)

Description:

The bill routing and contact information is recorded with the pending stop details. When the Service Agreement is stopped the Person and Account will be updated.

1.9 Transition Service Agreement to Pending Stop

Actor/Role: C2M (CCB)

Description:

The stop date is record on the [Service Agreement](#) and the status changed to Pending Stop.

Process Plug-in enabled Y

Available Algorithm(s):

LLREV - This "SA Type - Initiate Stop SA" algorithm causes service to be started under a landlord's account when a tenant stops service at a service point covered by a landlord agreement
SAIS-ST - This "SA Type - Initiate Stop SA" algorithm automatically stops a pending stop service agreement

2.0 5.3.2.1 C2M.SOM.Manage Field Activities and Service Orders**Actor/Role: C2M (CCB)****Description:**

A stop Field Activity may be created for each Service Point linked to the Service Agreement. A reference to each Field Activity created is recorded in the Service Agreement. Note the Pending SA/SP Monitor Process will also create Field Activities for Pending Starts and Stops if a Field Activity does not already exist and is required. Service Order Management orchestrates any field work or smart commands necessary to start service. Algorithms and configuration below are for reference only. Refer to 5.3.2.1 C2M.SOM Manage Field Activities and Field Orders for process details and a complete listing of algorithms, background processes, and configuration.

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

C2M-SASPFWCR – Creates field activities for pending start and pending stop service agreements if field activities do not already exist (C2M Implementations).
CI_SASPFWCRE –Creates field activities to be created for pending start and pending stop service agreements shortly before the pending start / stop date if field activities do not already exist (Non-C2M implementations).

Configuration Y**Entities to Configure:**

Field Activity Type
Field Activity Type Profile

2.1 Stop Service Agreement**Actor/Role: C2M (CCB)****Description:**

The Service Agreement status is transitioned to Stopped in C2M (CCB). This can occur because a CSR or Authorized User has manually transitioned the Service Agreement to Stopped or C2M (CCB) can automatically transition the Service Agreement to Stopped status when all of the required information is available. Algorithms below are for reference only as typically apply to other Service Agreement Types.

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

SAST-NB - Algorithms of this type execute additional logic that should be executed when a non-billed budget SA is stopped.
C2M-SAST-RF - This SA Type Stop algorithm refunds a service credit membership fee.

Customizable process N**Process Name:**

SAACT - Activates pending start Service Agreements and stops pending stop Service Agreements when all required information is available.

2.2 Create To Do Entry Group: Activation Pending Start/Stop SA**Actor/Role: C2M (CCB)****Description:**

If an exception occurs in the SAACT background process and if configured, a To Do Entry is created.

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

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

Configuration required Y **Entities to Configure:**

To Do Types
To Do Roles

2.3 Deactivate Usage Subscription

Actor/Role: C2M (MDM)

Description:

The related Usage Subscription is updated to Inactive status in C2M (MDM).

2.4 Update Person and Account Contact Details

Actor/Role: C2M (CCB)

Description:

The Service Agreement's Account and main customer Person is updated with the bill routing and contact information recorded in the pending stop details.

2.5 Remove Service Agreement from Non-Billed Budget

Actor/Role: C2M (CCB)

Description:

The Non-Billed Budget is updated to remove the Service Agreement as a covered service agreement. Refer to 3.4.4.3b C2M.CCB.Expire Non-Billed Budget.

2.6 3.4.4.3b C2M.CCB Expire Non-Billed Budget

Actor/Role: C2M (CCB)

Description:

Transition the Non-Billed Budget to the Pending Stop state. Note when the last active Service Agreement covered by a Non-Billed Budget is stopped, the Non-Billed Budget will be stopped. Refer to 3.4.4.3b C2M.CCB Expire Non-Billed Budget.

2.7 4.3.2.2 C2M.CCB Manage Severance Process

Actor/Role: C2M (CCB)

Description:

The Severance Process and applicable Severance Events are canceled. Refer to 4.3.2.2 C2M.CCB.Manage Severance Process

2.8 Remove Service Agreement From Collection Process

Actor/Role: C2M (CCB)

Description:

The Collection Process is updated to remove the Service Agreement. Refer to 3.4.3.2.1 C2M.CCB.Manage Collection Process.

2.9 4.3.2.1 C2M.CCB Manage Collection Process

Actor/Role: C2M (CCB)

Description:

The Collection Process is cancelled. Note if when the Service Agreement is removed from the Collection Process, the Collection Process is not related to another active Service Agreement, the Collection Process is cancelled Refer to 4.3.2.1 C2M.CCB Manage Collection Process.

3.0 Update Account's Bill Cycle

Actor/Role: C2M (CCB)

Description:

The Service Agreement's Account is updated in C2M (CCB). The Account's Bill Cycle is changed so the Account will be billed when billing next executes.

3.1 3.3.3.1 C2M.CCB.Refund Deposit

Actor/Role: C2M (CCB)

Description:

Transition the Deposit Service Agreement to the Pending Stop state. Note this occurs when there are no other active Service Agreements related to the Account for the same Deposit Class. Refer to 3.3.3.1 C2M.CCB.Refund Deposit.

3.2 3.4.4.3a C2M.CCB.Cancel Budget

Actor/Role: C2M (CCB)

Description:

Cancel the budget, refer to 3.4.4.3a C2M.CCB.Cancel Budget.

3.3 3.3.2.4 Stop Non-Premise Based Service

Actor/Role: C2M (CCB)

Description:

Transition to the Pending Stop state the active Service Agreements related to the same Account whose Service Agreement Type has a Stop Option set to 'Automatically Stop SA'. Note this occurs when all Premise Based Service Agreements related to an Account are stopped. Refer to 3.3.2.4 C2M.CCB Stop Non-Premise-Based Service.

3.4 3.3.2.4 Stop Sub Service Agreement

Actor/Role: C2M (CCB)

Description:

If the Sub SA should be stopped, it is transitioned to stop as part of the overall processing. Algorithms below are for reference only as typically apply to other Service Agreement Types.

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

SAST-NB - Algorithms of this type execute additional logic that should be executed when a non-billed budget SA is stopped.
SAST-RF - This SA Type Stop algorithm refunds a service credit membership fee.

Customizable process N **Process Name:**

ANLYZSAR - Analyze SA Relationship

Configuration required Y **Entities to Configure:**

SA Type

3.5 Evaluate and Perform Analysis

Actor/Role: CSR or Authorized User

Description:

Based on established business rules, the Authorized User investigates viable solutions or workarounds for the missing or incomplete information related to Service Agreement transition. The Authorized User enters this information in C2M(CCB-MDM).

3.6 Resolve Issue

Actor/Role: CSR or Authorized User

Description:

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

3.7 Request Stop SA

Actor/Role: CSR or Authorized User

Description:

The Authorized User manually stops the [Service Agreement](#) in C2M(CCB).

3.8 Request Stop Sub SA

Actor/Role: CSR or Authorized User

Description:

The Authorized User manually stops the Sub Service Agreement in C2M(CCB).

3.9 Request Complete To Do

Actor/Role: CSR or Authorized User

Description:

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

Configuration required Y**Entities to Configure:**

To Do Role
To Do Type

4.0 Complete To Do**Actor/Role:** C2M(CCB)**Description:**

The To Do Entry is updated to Complete status in C2M(CCB).

Configuration required Y**Entities to Configure:**

To Do Role
To Do Type

4.1 Analyze SA**Actor/Role:** CSR or Authorized User**Description:**

The CSR or Authorized User reviews the Service Agreement and determines next steps. The Service Agreement may be in Pending Stop status. The CSR or Authorized User reviews the pending stop [Service Agreement](#). For example the customer may indicate they are not moving from the given premise. Upon further analysis, the CSR or Authorized User may need to manually stop or cancel the Service Agreement as applicable.

4.2 Initiate Cancel for Pending Stop SA**Actor/Role:** CSR**Description:**

The CSR or Authorized User cancels the Service Agreement.

4.3 Cancel Pending Stop**Actor/Role:** C2M (CCB)**Description:**

The Pending Stop Service Agreement is transitioned back to Active.

4.4 Evaluate Eligibility for Cancellation**Actor/Role:** CSR or Authorized User**Description:**

The CSR or Authorized User determines if there are Financial Transactions associated with the Service Agreement that can be canceled.

4.5 Request Cancel Adjustment(s)**Actor/Role:** CSR or Authorized User**Description:**

The Authorized User cancels applicable adjustment(s) in order to cancel the Service Agreement. The Service Agreement balance is updated accordingly.

Configuration required Y **Entities to Configure:**

Adjustment Cancel Reason

4.6 Cancel Adjustment(s) and Update Balance**Actor/Role:** C2M(CCB)**Description:**

The Service Agreement balance is updated in C2M(CCB) to reflect the adjustment cancellation.

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

CMCA-CRDT Adjustment Cancellation - Create To Do Entry
--

Configuration required Y **Entities to Configure:**

Adjustment Cancel Reason
Adjustment Type

4.7 4.2.2 C2M.CCB Manage Bill**Actor/Role:** CSR or Authorized User**Description:**

The CSR or Authorized User cancels existing Bill Segment Financial Transactions. Refer to 4.2.2.2 C2M.CCB-MDMManage Meter Charges and 4.2.2.3 C2M.CCB-MDM Manage Non-Metered Charges.

Configuration required Y **Entities to Configure:**

Cancel Reason – for Bill, Payment or Adjustment

4.8 4.3.1.1 C2M.CCB Manage Payments**Actor/Role:** CSR or Authorized User**Description:**

The CSR or Authorized User cancels existing Payment Financial Transactions. Refer to 4.3.1.1 C2M.CCB.Manage Payments

Configuration required Y **Entities to Configure:**

Cancel Reason – for Bill, Payment or Adjustment

4.9 Request Cancel SA

Actor/Role: CSR

Description:

The CSR or Authorized User cancels the Service Agreement.

5.0 Cancel Service Agreement

Actor/Role: C2M (CCB)

Description:

The Service Agreement is transitioned to a canceled status.

Process Plug-in enabled Y	Available Algorithm(s):	C1-CNC-TUM - Cancels related true up monitors
		C2M-SACA-CRT- This Algorithm Type creates a To Do Entry when SA Canceled

5.1 Cancel SA Relationship

Actor/Role: C2M (CCB)

Description:

The SA Relationship is updated to Canceled status in C2M (CCB).

5.2 Cancel Sub Service Agreement

Actor/Role: C2M (CCB)

Description:

Cancel related Sub Service Agreements. The cancellation of a Service Agreement can trigger other actions such as the cancellation of a True Up Monitor (See 3.3.8.1 C2M.CCB.Establish and Maintain Net Metering Energy Metering Service for details on True Up Monitors).

Process Plug-in enabled Y	Available Algorithm(s):	C1-CNC-TUM - Cancels related true up monitors
		SACA-CRTODO - Create To Do Entry

Business Object Y	Business Object	C1-NEMTrueUpTask
		C1-NEMTrueUpTaskType

Configuration required Y	Entities to Configure:	SA Type
		Service Task Type
		Characteristic Type

5.3 Close Service Agreement

Actor/Role: C2M (CCB)

Description:

The Service Agreement is transitioned to Closed status. This occurs automatically when the Service Agreement is Stopped or Reactivated, has a frozen Bill Segment marked as Closing and the Service Agreement's balance is changed to zero.

5.4 Reactivate Service Agreement

Actor/Role: C2M (CCB)

Description:

The Service Agreement is transitioned to Reactivated status. This occurs automatically when the Service Agreement is Closed and the Service Agreement's balance is changed to a non zero value.

5.5 Activate Usage Subscription

Actor/Role: C2M (MDM)

Description:

The related Usage Subscription is updated to Active status in C2M (MDM).

5.6 Evaluate Service Agreement to Reinstate

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User reviews the Service Agreement and related information.

5.7 Request Reinstate Service Agreement

Actor/Role: CSR or Authorized User

Description:

The CSR or Authorized User requests to reinstate the Service Agreement. A closing bill segment must be canceled prior to the Reinstate action. Note the Reinstate action can be used to reinstate a Closed, Reactivated, or Stopped Service Agreement. Stopped, Reactivated, Closed Sub SAs are returned to Active. Additional updates may be required such as restarting a Deposit SA, Updating Credit and Collection processes, or placing the Account on Budget Billing.

5.8 Update Service Agreement to Active

Actor/Role: C2M (CCB)

Description:

The Service Agreement is transitioned to the Active state.

5.9 Update Sub Service Agreement to Active

Actor/Role: C2M (CCB)

Description:

The related Sub Service Agreement is transitioned to the Active state.

Test Documentation related to the Current Process

ID	Document Name	Test Type

Document Control

Change Record

Date	Author	Version	Change Reference
3/8/2009	Colleen King	Multiple	Multiple Changes in March
8/13/09	Colleen King		Changes after Review
10/8/09	Colleen King		Changes after Review
10/20/20	Geir Hedman		Update Title and Content page
11/15/10	Jenny Vagilidad		Added other algorithms and Auto-Stop non-premise based SA functionality
2/6/11	Geir Hedman		Updated Document and Visio
3/29/13	May Wang	V2.4	Updated Document and Visio
05/12/13	Galina Polonsky		Reviewed, Approved
09/02/15	Muhssin Suliman		Updated to CCBv2.5
11/10/15	Galina Polonsky		Reviewed, Approved
08/21/2017	Angus Mackenzie		Updated for C2M and CCB V2.6
10/12/2017	Ekta Dua		Updated Document and Visio for formatting changes
10/17/2017	Galina Polonsky		Reviewed, Approved
12/15/2017	Colleen King		Further updates for Visio and Word Document
12/21/2017	Galina Polonsky		Reviewed, Approved
05/29/2019	Satya Kalavala		Updated format for v2.7

Attachments:

Control Central Search



Control Central
Search.doc

Dashboard



Dashboard Pending
Stop.docx

Start Stop - Pending Stop



"Start Stop - Pending
Stop"

Pending Stop Service Agreement



"SA - Pending St"