

## Customer Care & Billing: Functionality for Implementers Ed 7

Oracle Utilities

DURATION

**10 Days**

MODULES

**11 Lectures**

COURSE CODE

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### Course Overview

This Customer Care and Billing: Functionality for Implementers training provides in-depth information about the customer management product's configuration. You'll examine each CCB subsystem and discuss the configuration options and how they affect the system's operation.

### What You Will Learn

#### Oracle Utilities Customer Care and Billing Overview

- Objectives
- The System
- Customer Information
- Sales & Marketing
- Device Management
- Field Work
- Meter Reading
- Billing
- Statements
- Rates
- Payments
- Adjustments
- Credit & Collections
- Budgets
- Deposits
- SA Relationships
- Service Credits
- Contract Management
- Loans
- Conservation Programs
- Framework Utilities

- Integration Tools
- Summary
- The System
- The Format of This Class
- The Documentation
- Caveat
- Summary

## Control Central and User Interface Standards

- Objectives
- Practice 2-1
- The Anatomy Of All Pages
- Control Central
- Control Central Search Facilities
- Invoking Help
- Help: Finding Information
- Find a Customer/Premise
- The Dashboard
- Dashboard + Account Information = 360-Degree View of the Customer
- Portals Versus Fixed Pages
- Portals Have Zones
- Portal Preferences
- New Zones Appear in Account Information
- Dictating Portal Preferences
- The Dashboard Is a Portal Too
- Zone Patterns
- Explorer Zone Layout
- Broadcasting
- Explorer Zones May Have End-User Filters
- Dragging and Dropping
- Work Lists
- Working the List
- Starting Business Processes
- Practice 2-2
- Map Zones
- Section and Element Help
- Explorer Zones Are Configured, Not Programmed
- Special-Purpose Zones
- Special Feature – Timeline Zone
- More Special Feature Zones
- You’ve Seen Several BPA Scripts
- The BPA Menu
- BPA Scripts Are Everywhere
- BPA Scripts Reflect An Organization
- Scripts Are Configured

- Fixed Pages
- Object Maintenance Pages
- Search Pages
- Other Pages
- Some Transactions Use Both Metaphors
- Portal-Based Maintenance is Becoming More Common
- Why Evolve?
- Menu and Admin
- Context Menus
- Context Menu – Opening a Search Page
- Context Menu – Opening a Portal
- Practice 2-3
- Grids
- Scrolls
- Search
- Recap of General Layout
- Recap of Dialogs
- Demo Versus Empty Install
- A Configuration Tools Example
- The Configuration Tools Class
- Summary
- Review Questions

## Metadata and Framework Overview

- Objectives
- Agenda
- Oracle Utilities Application Framework Overview
- Oracle Utilities Application Framework
- Browser UI Activities
- Web Server Activities
- Web Application Server Breakdown
- Application Server Activities
- Database Server Activities
- Entity Relationship Diagramming (ERD)
- Information Is Stored in Tables, Each Box In An ERD Is a Table
- Color-Coding Highlights the Subsystem Where the Table's Rows are Typically Maintained
- The PowerPoints Use Color-Coding To Group Tables into Logical Subsystems
- We use ERDs To Highlight Important Business Relationships
- Relationships Between Entities Are Highlighted with Arrows Between Boxes
- Dashed Lines Represent Columns on Entities With Predefined "Lookup" Values
- The Table and Field Metadata
- The Application Viewer Is Your Primary Documentation of Tables and Fields
- The Application Viewer Is Generated from Metadata
- Practice 3-1
- No Recurring Groups

- Prime Keys
- Prime and Foreign Keys In The Application Viewer
- Very Little (Almost No) Redundant Data
- Language Tables
- XML Extensions
- MO Definition
- Why MOs?
- MO, Table, Field Metadata
- MOs Are Also In the App Viewer
- MOs Encapsulate Core Business Rules
- Maintenance Objects Versus Business Objects
- A Maintenance Object Has Fields, A Business Object Has Elements
- A BO's Elements Must Physically Reside Somewhere in its MO's Tables
- BOs Encapsulate Core Business Rules
- BOs and SOA
- Older MOs = Object Maintenance Newer MOs = Portal Maintenance
- Plug-in = Algorithm
- An Algorithm Example
- Use a Base Package Plug-In or Write Your Own
- Creating a New Plug-In
- Some Objects Are Preconfigured
- The Application Viewer Also Contains Algorithms
- Practice 3-2
- User-Defined Fields Extend ...
- Many MOs Support Characteristics
- There Are Four Types of Char Types
- Predefined Char Types
- Ad Hoc Characteristic Types
- Foreign Key Reference Characteristic Types
- File Location Characteristic Types
- Characteristic Values Are Effective-Dated on some Entities
- A Char Type Can be Used on Multiple Entities
- Practice 3-3
- Owning Metadata
- Owner Flag ERD
- Owner Flag Is Ubiquitous
- The System Stamps Owner Flag On New Metadata Rows
- Don't Even Think About It
- Practice 3-4
- Web Services Architecture
- XAI / Web Services
- More Web Services Information
- Database and Operating System Security
- Application Services Are Secured
- Application Services Have Valid Actions
- Field-Level Security

- Field-Level Security Overview
- Security Rights Are Cached
- Practice 3-5
- Audit Trails
- Localization Support
- Isolating Implementation-Specific Business Rules
- The Conversion Tool
- Review Questions

## Batch Processing

- Objectives
- Batch Processes
- Batch Processes Are Documented In the Application Viewer
- What You Can Count On
- Errors
- Parallel Processing
- Optimal Number of Threads
- Parameters
- Batch Processing ERD
- Practice 4-1
- Separate Application Servers
- Submitting Ad Hoc Requests
- Practice - Instructor-Led
- Batch Process Dependencies
- Classic Batch Job Versus Sample and Submit
- Step 1: Identify the Batch Job
- Step 2: Enter the Criteria
- Step 3 (optional): See the Sample
- The Request
- How To
- Some Processes Can Be Viewed as Plug-Ins
- Review Questions

## Maintaining Customer Information

- Objectives
- Customer Information
- Customer = Person and Account
- Practice 5-1
- Important Person Concepts
- Person ERD
- Person Contacts
- Practice 5-3
- Important Account Concepts
- Account ERD
- Practice 5-2

- Customer Contact: Overview
- Customer Contact ERD
- Practice 5-4
- Customer Contacts Trigger To-Do Entries
- Customer Contacts Trigger Letters
- Letter Images
- Important Premise Concepts
- Premise ERD
- Important Service Point Concepts
- Types of Service Points
- Metered Service Points
- Badged Item-Based Service Points
- Unbadged Item-Based Service Points
- Two Ways to Handle Area Lights: Badged or Unbadged
- Service Point ERD
- Practice 5-5
- Review: Bills Are Sent to Customers
- A Bill Contains Charges for Services
- An Account Must Have a Service Agreement For Every Service That Is Billed
- Some SAs Are Linked to Premises via SPs
- Some SAs Are Not Linked to Premises
- Service Agreement ERD
- Account Security: Overview
- Persons Can Also Be Secured
- Premises Can Also Be Secured
- Data Access Groups and Roles
- An Account's Access Group
- More Account Security Information
- The V Diagram
- Two SAs, Each Linked to a Single SP (A Normal, Single-Family Residence Scenario)
- Two SAs Linked to the Same SP
- One SA linked to Two SPs (To Consolidate Consumption Charges)
- Typical Family Moves
- Non-Utility Customer
- Customers Share One Line, Usage Goes Through One Meter on the Way to Another Customer
- Corporate Pays For Usage, Operating Units Pay For Transport & Metering
- SA Type and SP Type Control the Valid Relationships
- Most SAs Are Created Via Start Service
- Start Options Control Default Values
- Practice 5-6
- Service Agreement States
- Activating Pending Start SAs
- Important Service-Oriented Concepts Still to Come
- The Alert Zone
- The Control Central Alert Plug-In Spot
- Jurisdictional Rules

- Division = Jurisdiction
- Replicators
- Alternate Names and Addresses
- Address Validation
- Configuring Address Validation
- Address Validation BPA
- Introducing Custom Address Validation Logic
- Account Management
- Account Management Portal – Account Update
- Supported Account Updates
- Supported Service Agreement Updates
- Notification Preferences
- Notification Preferences: Key Relationships
- Notification Preferences Management Process Overview – Enabling Customer Choice
- Push versus Subscription Notification Types
- Push-Based Notifications
- Account – Account Portal: Push Communications Preferences Zone
- Subscription-Based Notifications
- Account – Account Portal: Subscription Communication Preferences Zone
- Account – Persons: Notification Preferences
- Account – Account Portal: Maintaining Contact Details
- Master Configuration
- Practice 5-7
- Review Questions

## To Do Lists

- Objectives
- Oracle Utilities Customer Care and Billing
- What Is To Do Processing?
- To Do Summary
- To Do List
- To Do Summary Zone
- Practice 6-1
- To Do Type
- Message
- To Do Roles
- Special Message Handling
- Role Assignment
- How Entries Are Created
- Batch Process
- The Creator Supplies Other Attributes
- Filling In The Blanks
- To Do Entry Summary ERD
- Practice 6-2
- Related To Do's
- Related Entries Are Also Shown in the Dashboard

- Related To Do ERD
- Practice 6-3
- To Do Entry Lifecycle
- Forwarding
- Manual Completion
- Batch Processes Can Complete Entries
- To Do Entries Have Logs
- Log Entries
- To Do Search Is Powerful
- Practice 6-4
- Entry Priority
- Priority Assignment
- Priority Updates: Scenario
- Assigning Entries to Users
- On Demand Assignment
- On Demand – How It Works
- Skill-Based Assignment: Overview
- Skill Level ERD
- Skill Level Override for a Specific Message ERD
- Skill-Based Summary
- The Benefits
- Supervisor Push
- Summary of Entries by User
- Supervisor Assignment
- Pick and Choose
- Multi-Use Pages
- Practice 6-5
- To Do Entries May be Routed To an External System
- Configuration to Implement External Routing
- Practice 6-6
- To Do Types Are Documented in the Application Viewer
- What To Do Entries Aren't
- Purging Old Entries
- Review Questions
- Creating New To Do Types
- Introducing a New Type of Entry Involves the Following Steps
- Analysis Example: Account has active SAs, but has no bill cycle
- Example Setup: Account has active SAs, but has no bill cycle
- Example Programming: Account has active SAs, but has no bill cycle
- 7a Sales & Marketing
- Objectives 7a-2
- Sales & Marketing 7a-3
- Definitions 7a-4
- Practice 7-1 7a-5
- What Just Happened? 7a-6
- The Order's Campaign Controls Many Things 7a-8

- Campaign ERD 7a-9
- Practice 7-2 7a-10

A Campaign may have Zero or More Packages. A Campaign's Packages Define what is Sold 7a-12

- Package ERD 7a-13
- Practice 7-3 7a-14
- Business Process Flow Is Flexible 7a-16
- Business Process Flow 1 – Upload Prospects from a Marketing Database 7a-17
- Business Process Flow 2 – Market to a Pre-Selected Customer Segment 7a-18
- Business Process Flow 3 – Ad hoc Upselling to Existing Customers 7a-19
- Business Process Flow 4 – Ad hoc Selling to New Customers 7a-20
- Business Process Flow 5, 6, 7, 8 – Packages Are Optional 7a-21
- An Order's Questions & Misc. Fields 7a-23
- All Q&MFs Are Defined on the Campaign 7a-25
- Q&MF Responses 7a-26
- Q&MF ERD 7a-27
- Groups of Columns 7a-28
- Practice 7-4 7a-29
- Use Case 1: Marketing Surveys 7a-31
- Practice 7-5 7a-32
- Use Case 2: Setting Up a Customer Prior to Start/Stop 7a-33
- Practice 7-6 7a-34
- Use Case 3: Setting Up a One-Time Charge 7a-35
- Use Case 4: Creating Service Agreements and Service Points 7a-36
- There Are Two Types of Eligibility Rules 7a-38
- Package Eligibility Rules: Eligibility Groups Contain Criteria 7a-39
- Schematic of a Sample Package's Eligibility Rules 7a-40
- Eligibility Criteria 7a-42
- Another Example 7a-43
- Eligibility Criteria ERD 7a-44
- Eligibility Group ERD 7a-45
- Practice 7-7 7a-46
- Campaign versus Package Eligibility Rules 7a-48
- Campaign Eligibility Algorithms 7a-50
- Campaign State Transition Rules 7a-52
- Package State Transition Rules 7a-53
- Order State Transition Rules 7a-54

An Order's Questions & Misc. Fields Are Used to Record Information That Isn't Kept in "Real" Fields on the Order 7a-55

Characteristic-Oriented Q&MFs can Cause Characteristics on Account, Person, Premise and Order to be Created or Updated 7a-56

Column-Oriented Q&MFs can Cause Fields on Almost any Object to be Created or Updated 7a-57

The SA Creation Rules Linked to the Package Selected on the Order, Control the SAs and SPs That Are Created 7a-58

- When an Order Is Created, The "V" is Set Up 7a-59
- The Sequence of Events at Completion Time 7a-60
- Reminder: Your Campaigns Can Do Many Things 7a-62
- The Design Process Can Be Challenging 7a-63
- Use the Documentation 7a-65
- Order Versus Start/Stop 7a-67

- Premise Characteristics 7a-69
- Service Point Characteristics 7a-70
- To Do Processing 7a-71
- Post Completion Processing 7a-72
- When Are V Objects Created 7a-73
- Review Questions 7a-74
- 7b Sales & Marketing
- Objectives 7b-2
- 🎯🎯 Before We Begin 7b-3
- Program Management 7b-5
- Primary Functional Components 7b-6
- Program Management: Related Tables and Maintenance Objects 7b-7
- Similarities: Structure 7b-9
- Differences: Inward Versus Outward 7b-10
- Differences: Business Objects 7b-11
- Program Management: Lead 7b-12
- Lead Lifecycle 7b-13
- Practice 7-1: Create a Lead 7b-14
- Initiative Overview 7b-16
- Initiative Hierarchy 7b-17
- Program Management: Initiative 7b-18
- Initiative Lifecycle 7b-19
- Practice 7-2: Explore the Initiative Configuration 7b-20
- When to Create Eligibility Rules 7b-22
- Eligibility Rules 7b-23
- Eligibility Criteria: Example of Criteria for Segmentation 7b-24
- Practice 7-3: Explore Eligibility Criteria 7b-25
- Lead Events 7b-27
- Program Management: Lead Event 7b-28
- Lead Event Lifecycle 7b-29
- Practice 7-4: Explore Lead Event Type Configuration 7b-30
- Practice 7-5: Configure a Lead Event Type 7b-31
- Practice 7-6: Configure an Initiative 7b-32
- Individuals or Groups 7b-34
- Program Management: Representative 7b-35
- Third Party Representative 7b-37
- Sales Representatives Versus Third Party Representatives 7b-38
- Program Management: Representative 7b-39
- Practice 7-7: Explore the Sales Representative Configuration 7b-40
- Initiative Portal 7b-42
- Master Configuration 7b-45
- Practice 7-8: Add a Lead to a Customer 7b-46
- Summary 7b-47
- Review Questions 7b-48

- Objectives
- Checkpoint
- Review: Service Points Define Services at a Premise
- Review: There are Three Types of Service Points
- Review: Metered Service Points
- A Meter's Registers Measure How Much Was Used
- Every Register Has Many Attributes
- A Register's Attributes Can Change Over Time
- Meter ERD
- There Are Many Ways to Identify a Meter
- Service Types Must Be in Sync ERD
- Practice 8-1
- A Configuration's Registers Are Read
- Subtractive Versus Consumptive Registers
- Meter Read ERD
- Important SP/Meter Installation Concepts
- Meter Installation ERD
- Practice 8-2
- How to Exchange the Meter at an SP
- Remember That There Are Two Types of Item-Oriented SPs
- This Discussion Concerns Badged Items
- When to Use a Badged Item
- Badged Item ERD
- There Are Two Ways to Identify a Badged Item
- Item Replicator
- Important SP/Item Installation Concepts
- Item Installation ERD
- Important Item Exchange Concepts
- Unbadged Items Are an Alternative
- Meter/Item Search Page
- Practice 8-3
- Review Questions
- 9a Field Work: Managing Field Work
- Objectives 9a-2
- Checkpoint 9a-3
- Field Activities 9a-4
- Field Activity ERD 9a-5
- Field Activity State Transition 9a-6
- Practice 9-1 9a-7
- Operations Areas 9a-9
- Dispatch Groups and Representatives 9a-10
- Field Service Control Is a Multidimensional Matrix 9a-11
- Dispatch Group Assignment Is in a Plug-In 9a-12
- Practice 9-2 9a-13

- Field Orders Are Premise Oriented Field Activities Are SP Oriented 9a-15
- Different Dispatch Groups Result in Different Field Orders 9a-16
- Field Orders May Be Assigned a Specific Rep 9a-17
- Field Order and Rep ERD 9a-18
- Field Order State Transition 9a-19
- Capturing Reasons 9a-21
- Enabled with a Feature Configuration 9a-22
- The Pages Change 9a-23
- Reschedule Reason Audits 9a-24
- The Group Premise FAs Alternative 9a-26
- The Group Premise FAs Page 9a-27
- Lowest Common Denominator Dispatch Group 9a-28
- Batch Dispatcher 9a-29
- Practice 9-3 9a-30
- Automatic Field Activity Creation 9a-32
- Field Activity Type Profile 9a-34
- Field Activity Type Profile is a Multidimensional Matrix 9a-35
- FA Type Profile Also Defines Valid FA Types 9a-36
- Service-Oriented Field Activities Are Created by a Plug-In 9a-37
- When Service-Oriented Activities Are Created 9a-38
- You Don't Know About Schedule Read Dates Yet... 9a-39
- Not All Automated FA Creations Use FA Type Profiles 9a-41
- Dispatching Field Orders 9a-43
- Dispatched to Completed 9a-44
- Complete Activities, Then Complete Order 9a-45
- Completion Algorithms 9a-46
- Completion Algorithms ERD 9a-47
- Practice 9-4 9a-48
- Completion Upload 9a-50
- Two Batch Process Are Used To Download Field Orders 9a-52
- Process FDS: Create Download Staging 9a-53
- Each Download Record Gets Marked with a Batch Control and Run 9a-54
- FODL Creates a Flat File 9a-55
- FODL Executes an Algorithm to Format the Flat File Information 9a-56
- An Aside: Ongoing Instructions and Warnings 9a-57
- Metered SAs Need Start Reads to Bill 9a-59
- SA Activation Batch Process 9a-60
- Metered SA's Need Stop Reads to Final Bill 9a-61
- SA Activation Also Handles Pending Stops 9a-62
- SA / FA / MR Flow 9a-63
- Credit & Collections 9a-64
- Practice 9-5 9a-65
- Field Activities are for All SP-Related Efforts 9a-67
- Review Questions 9a-68
- 9b Field Work: Appointments
- Objectives 9b-2

- Appointment Scheduling 9b-3
- A Dispatch Group Refresher Before We Start 9b-5
- Dispatch Group Assignment ERD 9b-6
- Appointment Periods and Appointments 9b-8
- Limiting the Number of Appointments 9b-9
- Appointment Period Maintenance 9b-10
- Updating Appointment Periods 9b-11
- Practice 9-1: Creating and Updating Appointment Periods 9b-12
- Scheduling An Appointment 9b-14
- Default Dispatch Group and Date 9b-15
- Available Appointments are Controlled By an Algorithm 9b-16
- The Base-Package Available Appointments Algorithm 9b-17
- Canceling Appointments 9b-18
- Practice 9-2: Scheduling and Cancelling Appointments 9b-19
- Penalties 9b-21
- Review Questions 9b-22
- 10a Devices Inventory and Testing: Equipment Management
- Objectives 10a-2

#### Equipment, Meters, and Items Are Installed at a Premise to Regulate and Measure Service 10a-3

- There are Two Types of Items 10a-4
- Equipment May Be Associated with Meters 10a-5
- Equipment May Be Associated with Service Points and Items 10a-6
- Preventing Invalid Equipment Linkages 10a-7
- Foreshadowing: Equipment Is NOT Billed 10a-8
- Generic Equipment 10a-9
- Generic Equipment – How To Do It 10a-10
- An Installation Service Point Holds Multiple Pieces of Equipment 10a-12
- Installation SP ERD 10a-13
- Practice 10-1 10a-14
- Review Questions 10a-15
- 10b Devices Inventory and Testing: Device Testing
- Objectives 10b-2
- Item and Meter Tests 10b-3
- Device Test Example 10b-4
- Badged Items and Meters Can be Tested 10b-5
- Device Test Type Example 10b-6
- The Control Tables Are Sophisticated 10b-7
- Device Test Lifecycle 10b-8
- Practice 10-1 10b-9
- Device Tests Occur Because of Field Activities 10b-11
- How to Create Device Test Field Activities 10b-12
- Test Selection Creates Field Activities Based on an Algorithm 10b-13
- Review Questions 10b-14
- 10c Devices Inventory and Testing: Asset Inventory
- Objectives 10c-2
- Stock Location Tracking 10c-3

- Stock Location 10c-4
- Stock Location Characteristics 10c-5
- Asset Stock Location History 10c-6
- Asset Stock Location History ERD 10c-7
- Default Location for SP Removals 10c-8
- Manually Changing an Asset's Stock Location 10c-9
- Practice 10-1 10c-10
- Review Questions 10c-11

## Meter Reading

- Objectives
- There are Many Sources of Meter Reads
- Meter Read ERD
- Meter Read Remarks Can Trigger Other Events
- Consumption Estimation Is in a Plug-In
- Important Estimation Concepts
- How Does MR EST TREND Work?
- An Example: Estimating Consumption for February
- An Example: Estimating Non-Peak Consumption
- An Example: Estimating Peak Consumption
- Trend ERD
- Ensuring a Statistically Significant Sample
- Trend Is Updated in Batch
- High/Low Limits Are Calculated in a Plug-In
- High/Low Check Plug-In
- High/Low Factor ERD
- Failing High/Low and Use on Bill
- Reviewing Readings That Failed High/Low Checks
- Practice 11-1
- Review Questions

## Route Management and Field Activity Upload

- Objectives
- Important Service Cycle Concepts
- SP Type Controls The Number of Cycles on a Service Point
- Single Service Cycle ERD
- SPs Also Need a Route and Sequence
- Renumbering Service Points in a Route
- Transferring a Route
- Practice 12-1
- Downloading Meter-Read Requests
- When Cycle and Route Frequency Differ
- The Three Download Batch Processes
- Process MSR: Create MR Schedule Routes
- Process MDS: Create Download Staging

- Process MDL: Create Download Flat File
- The Source of the Batch Control
- Summary: Meter Read Download ERD
- Important! The Service Cycle Schedule Is Also Used by Billing
- Practice 12-2
- The Upload Processes
- Process X: Populate Upload Staging
- Process MUP1: Populate Meter Config
- Process MUP2: Create Meter Reads
- Important: The MR Upload Has Other Uses
- Purging Upload Records
- Practice 12-3
- Demo Database Contains a Sample Transaction
- Find a Scheduled Date for a Route Zone
- See Service Points in a Route for a Scheduled Selection Date Zone
- See Register Reads in a Route for a Scheduled Selection Date Zone
- Multiple Service Cycles
- Waste Collection Background Information
- Multi-Service Cycle ERD
- Waste Collection Scenario 1
- Waste Collection Scenario 2
- The Three Download Batch Processes
- Service Route Download ERD
- Field Order Completion Details Can Be Uploaded
- Step Types That Are Supported By the Batch Completion Process
- The Upload Processes
- Process X: Populate Upload Staging
- Processes MUP1 and MUP2: Create Reads
- Process FACOMPL: Complete Field Activities
- Process FACOMPL: Complete Field Activities – Errors
- Purging Upload Records
- Uploading “Generic” Step Types
- Review Questions

## Financial Transactions

- Objectives
- FTs Determine an Account’s Balance
- Source of FTs
- Bill Segments Create FTs
- Payment Segments Create FTs
- Adjustments Create FTs
- Practice 13-1
- Current Balance Versus Payoff Balance
- Every FT Contains Current Amt and Payoff Amt
- Practice 13-2
- Examples When Current Balance Does Not Equal Payoff Balance

- GL Details
- Examples of FTs Without GL Details
- How Old is the Debt?
- Specific Days are Shown on Several Transactions
- Arrears Date
- Arrears Date is Typically Populated by Billing
- Practice 13-3
- FT Algorithms Control how FTs are Created
- FT Status
- FTs Affect More Than Balances
- Updating the General Ledger
- The the GL Download Processes
- Process GLASSIGN
- Process GLS: Prepare FTs for Download
- Process GLDL: Create Download Flat File
- Practice 13-4
- Overview of Balance Control
- The Balance Control Batch Processes
- Process BCGNEW: Create a New Balance Control Group
- Process BCASSIGN: Assign New FTs a Balance Control Group
- Process BCGSNAP: Insert Balance Control Members And Check Financial Integrity
- Review Questions
- 14a Billing
- Objectives 14a-2
- Checkpoint 14a-3
- A Bill Contains Charges for Services 14a-4

An Account Must have a Service Agreement For Every Service that is Billed 14a-5

- An SA's SA Type Controls Many Billing Functions 14a-6
- Definitions 14a-8
- Bill ERD 14a-10
- Bill Lifecycle 14a-11
- Most Bills are Produced in Batch 14a-13
- Bill Cycles 14a-14
- Window Billing 14a-15
- Other Bill Cycle Schedule Functions 14a-17
- How an Account Gets its Bill Cycle 14a-18
- If the SP's Meter-Read Cycle Changes 14a-19
- Practice 14-1 14a-20
- Bill Segment Creation Algorithms 14a-22
- Get Consumption is First 14a-24
- Bill Segment Consumption Snapshot ERD 14a-25
- Creating Estimated Reads 14a-26
- Estimating Earlier Than the Schedule Allows 14a-27
- Creating Bill Segments by Applying a Rate 14a-28
- Rated Bill Segment ERD 14a-29
- An Aside: Bill Segments are Snapshots 14a-30

- Multiple Bill Segments May Be Created 14a-31
- Control Processing Sequence 14a-33
- Processing Sequence on SA Type 14a-34
- Review: Bill Segments' FTs 14a-36
- Practice 14-2 14a-37
- Metered SAs are Special 14a-39
- Time Period Derivation for Non-Metered Service 14a-40
- Use a Bill Period to Derive the End Date 14a-41
- Anniversary Date 14a-42
- The Default – Current Business Date 14a-43
- Preventing Short Bill Segments 14a-44
- More to Come 14a-45
- Bill Segment Lifecycle 14a-47
- Freeze at Bill Completion 14a-48
- Classic Errors 14a-50
- Bill Segment Errors 14a-51
- Bill Segment Remarks 14a-52
- Bill Errors 14a-53
- Errors After The Window Closes 14a-54
- Bill Lifecycle 14a-56
- Bill Completion is Intensive 14a-57
- SA Type Pre-Completion Algorithms 14a-58
- Customer Class Pre-Completion Algorithms 14a-59
- Bill Due-Date Calculation ERD 14a-60
- LPC Computation – Levying The Charge 14a-61
- LPC – Manual Intervention 14a-63
- Bill Routings 14a-64
- Bill Routing ERD 14a-65
- Route Method 14a-66
- Four Potential Mailing Addresses ERD 14a-67
- An Aside: Reprints 14a-68
- Customer Class Bill-Completion Algorithms 14a-69
- SA Type Bill-Completion Algorithms 14a-70
- Messages can be Linked to a Bill And/Or Bill Segments 14a-71
- Messages can be Linked to a Bill and/or Bill Segments 14a-72
- Messages with Variables 14a-74
- A Bill Summarizes Financial Transactions 14a-75
- All New FTs will be Swept onto the Bill 14a-76
- Customer Class Post Completion Algorithms 14a-77
- Practice 14-3 14a-78
- Overriding SQs and Items 14a-80
- Review: Bill Routing ERD 14a-82
- Postal Routing 14a-83
- Marking a Routing Record With a Batch Control and Run 14a-84
- Process POSTROUT: Create Download Flat File For Postal Routing 14a-85
- Configurable Bill Print Extract 14a-86

- Bill Print Extract Record Types 14a-87
- How is the XML Extract Constructed? 14a-88
- Extending the XML Extract 14a-89
- Bill-Print Intercept 14a-90
- UI Interlude 14a-92
- Bill Summary Differs for Open-Item Customers 14a-93
- Bill Segments Differ for Accounts with Many SAs 14a-94
- Bill – Bill Segment for Large Accounts 14a-95
- Other Places Where Bills Are Displayed 14a-96
- Financial Information Dashboard Zone 14a-97
- Online Bill Image 14a-98
- Bill Info is Constructed by a Plug-In 14a-99
- Warning: Demo Portals and Zones Ahead 14a-100
- Bill History Zone on Control Central 14a-101
- Bill Segment Calc Lines Zone 14a-102
- View Bill Zone 14a-103
- SA Billing History Portal 14a-104
- SP Consumption Summary Portal 14a-106
- Practice 14-4 14a-107
- Bill Print Groups 14a-109
- Bill ERD 14a-110
- Bill Segments Produced by Applying a Rate 14a-112

When the Flat File is Created, the Language Tables are Accessed to Download Language Dependent Values 14a-113

- Reopening a Completed Bill 14a-115
- Mass Reopen 14a-117
- How to Avoid Reopening 14a-118
- Freezing and Completing 14a-119
- Closing Bills (... Bill Segments, really) 14a-121
- Sequential Bill Numbers 14a-123
- When Sequential Bill Numbers are Assigned 14a-124
- Correction via Cancellation 14a-126
- Different Correction Methods 14a-128
- The Cancel / Rebill Method 14a-130
- Cancel Only 14a-131
- Online Cancel / Rebill 14a-132
- Mass-Cancel an Entire Batch 14a-133
- Automatic Cancel Rebill 14a-134
- Automatic Cancel Rebill: An Example 14a-136
- Credit Notes 14a-137
- Online Credit Note Creation 14a-138
- Correction Notes 14a-139
- Online Correction Note Creation 14a-140
- Bill Segment Remarks 14a-141
- Cancellations Prior to Completion 14a-142
- Practice 14-5 14a-144
- Checkpoint 14a-146

- Billable Charges 14a-148
- Billable Charges may have Bill Lines 14a-149
- A Different Bill Segment Creation Algorithm 14a-150
- Billable Charge ERD 14a-151
- Billable Charges with Service Quantities 14a-153
- Billable Consumption ERD 14a-154
- Billable Charge Bill Segment ERD 14a-155
- Billable Charge Read Details 14a-157
- Billable Charge Read Details ERD 14a-158
- Billable-Charge Line Characteristics ERD 14a-160
- Billable Charge Templates Save Typing 14a-162
- How are Billable Charge Templates Used? 14a-163
- Practice 14-6 14a-164
- Billable Charge Upload Overview 14a-166
- The Upload Processes 14a-167
- Process X: Populate Upload Staging 14a-168
- Process BCU1: Populate and Validate SA ID and Line Details 14a-170
- Process BCU2: Create Billable Charge 14a-171
- Purging Upload Records 14a-173
- Strict and Wait Options 14a-174
- Recurring Charge SAs 14a-176
- Recurring Charge Bill Segment ERD 14a-178
- More to Come 14a-179
- Review Questions 14a-180
- 14b Billing Part 2: Off-Cycle Bill Generator
- Objectives 14b-2
- Financial Transactions on Bills 14b-3
- Off-Cycle Bill Generator Overview 14b-4
- Off-Cycle Bill Generator ERD 14b-5
- Off-Cycle Bill Generator Lifecycle 14b-6
- Creating the Bill 14b-7
- Practice 14-1 The Off-Cycle Bill Generator Business Object 14b-8
- Off-Cycle Bill Generator Portal 14b-9
- Standard Bill Page 14b-11
- Off-Cycle Bill Generator Query Portal 14b-12
- How to Access The Off-Cycle Bill Generator Portal 14b-13
- How to Create an Off-Cycle Bill Generator 14b-14
- Realigned Standard Bill Page Functions 14b-16
- Practice 14-2 Creating an Off-Cycle Bill 14b-17
- Summary 14b-18
- 14c Billing Part 3: Usage Requests
- Objectives 14c-2
- Not Applicable to All Implementations 14c-3
- Integration Overview 14c-4

BPTEL Orchestrates the Transformation and Load of Payloads Between CCB and MDM 14c-5

- Billing Creates Usage Requests 14c-6

- MDM Responds with Bill Determinants (or Errors) 14c-7
- The Usage Object Generates a Bill Segment 14c-8
- Usage Requests Are Not for Meters Only 14c-10
- SA Type Controls Everything 14c-11
- Get Consumption 14c-12
- Scalar Processing Details 14c-15
- Interval Processing Details 14c-16
- Usage Request Example 14c-17
- Bill Segment Creation 14c-18
- Practice 14-1 BD-oriented SA Configuration 14c-21
- Usage Business Objects 14c-23
- Usage ERD 14c-24
- Usage Request BO Lifecycle 14c-25
- Creating the Outbound Message 14c-30
- External Message Configuration 14c-31
- Practice 14-2 The Usage Request Business Objects 14c-32
- Usage Request Portal (Request) 14c-34
- Usage Request Portal (Response) 14c-35
- Usage Interval Data Overlay 14c-36
- Usage Request Portal (Exceptions) 14c-37
- Usage Request Log 14c-38
- Standard Bill Segment Page 14c-39
- Usage Request Query Portal 14c-41
- Practice 14-3 View a Usage Request 14c-42
- Corrected Reads 14c-44
- Corrected Reads BO 14c-45
- Corrected Read BO Lifecycle 14c-46
- Corrected Read Portal 14c-47
- Cancel/Rebill 14c-49
- Navigating to MDM 14c-51
- Summary 14c-53
- Review Questions 14c-54

## Managing Statements

- Objectives
- Checkpoint
- A Statement Consolidates SA FTs
- Statements Can Also Be