

Core Release Bulletin

***CostGuard Solution
18.1 Release***

Jan 2018

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About this Document

IDI's Core Release Bulletins describe new *Core* functionality introduced with the release through either Adaptive (AR) or Feature (FR) requests. Core functionality is defined as a capability that is available to all customers that upgrade to the release, although in some cases additional custom work may be required to leverage it. This document includes an overview of the new capabilities as well as the required configuration or setup information. Supporting documentation can be found on E-Support under [Online Help](#).

Additional training opportunities are also available through IDI University. Please contact your Account/Project Manager for more information.

1 Release Summary

The following change orders are of interest to both CostGuard users (IDI customers) and IDI associates.

Functional Area	AR/FR	Description
Payment Gateway	AR 7579 FR 2783 FR 2737 FR 2738	New Payment Gateway Application (PGA): <ul style="list-style-type: none"> PGA Web Application supports payment transaction search PGA Integration with CostGuard Client, Customer Care and OnlineBill – With PGA integration, these applications will not forward confidential information to the CostGuard server or store sensitive card information. These types of transactions will be handled using hosted iframe pages.
Customer Care	AR 7974	Separate Permission for Editing CPNI Fields – lets Customer Care users edit CPNI fields without providing edit ability to any other customer data currently available in the <i>Manage Customer</i> permission, and provides a separate permission for the <i>Account Password</i> field in CPNI.
Tickets	AR 7968 FR 2805	Email Address Field Editable for Unsolicited Email Tickets: <ul style="list-style-type: none"> Lets a colleague work a ticket when originating user is going to be out of the office. Facilitates correcting instances where Email Address field has wrong address e.g. Users sends email to wrong mailbox, CostGuard forwards email to the correct mail box; however, CostGuard email address is incorrectly placed in the Email Address field. Remain in Tickets when environment is changed - Users stay in Tickets module when switching environments rather than being redirected to <i>My Account</i> page in Security.
Orders	FR 2748 FR 2803	Cancel Unused Service Number Inventory Reservations when: <ul style="list-style-type: none"> Service is removed from assembling cart Cart is Submitted then Cancelled BEFORE Billing System Update Support for Sales Channels - Lets users identify and associate a sales person to an Order. This facilitates downstream reporting for sales commissions and so on.
E-Pay	AR 7835	Send SMS notifications when customer enrolls in recurring auto-pay – impacts Workflow, Customer Care and CostGuard Client
Wholesale Billing	FR 2806	Ability to track margins service providers earn with wholesale agreements as well as the margins the reseller is earning selling to the end-customer. To support this CostGuard can now track: <ul style="list-style-type: none"> Service provider's cost for usage and features being consumed Wholesale price being offered to the reseller Final retail price paid by the end-customer
Retail Installment Plans	FR 2809	Installment Plan (billing product) Start Date now represents when the corresponding equipment was fulfilled (shipped or picked up) rather than when it was purchased. Beginning billing of installments when the corresponding equipment is fulfilled prevents scenarios where subscribers are billed for equipment on back order or other fulfillment challenges/delays that can occur post-purchase.
Tempus Payment Gateway	AR 7913	Support for TransArmor token with Tempus eliminates a reconciliation issue.
Admin Console Security	FR 2808	Scaling Tab Size in Admin Console Security - Prior to this release, in Admin Console > Security, the tabs remained the same size when the window was maximized. This added empty space. This enhancement removes the empty space and improves the presentation.

2 Payment Gateway Application

The Payment Gateway Application (PGA) is a web browser application that lets a hosted iframe capture sensitive credit card information when making payments via CostGuard POS, Customer Care and OnlineBill. Having the PGA communicate with the payment provider with a hosted iframe and using the web service means that no sensitive credit card information is stored in IDI databases or passed over CostGuard networks.

The PGA has four major components:

- Web application – Used for tendering credit cards in POS.
- Web application – (Admin) Used for searching transactions and troubleshooting.
- Web services/APIs – Lets other applications such as OnlineBill and Customer Care consume the PGA as a microservice and support an iframe.
- Configuration – Various settings to enhance and control the PGA experience.

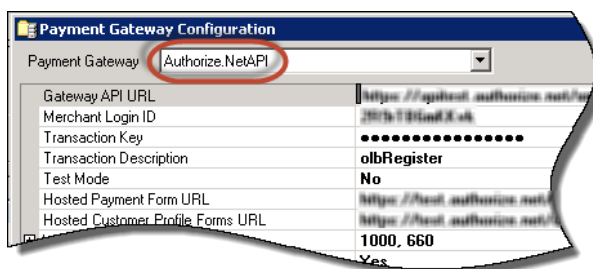
These components combine to provide the following benefits:

- iframe technology provides greater security.
- reduced development time for updates - Single touch point for supported gateway iframe code changes.
- transaction searching and troubleshooting reduces need to login into gateway portal.
- RESTFUL web services instead of SOAP (easier to consume).

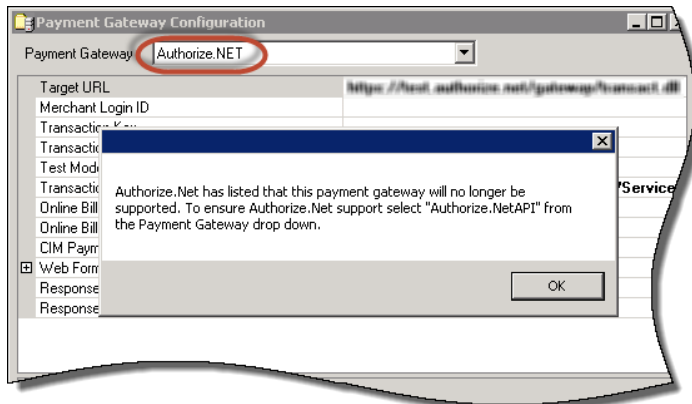
Currently, Authorize.NETAPI is the only Payment Gateway provider supported in the PGA.

2.1 SUPPORT FOR NEW AUTHORIZE.NET IFRAMES

CostGuard supports Authorize.Net's new REST APIs and hosted payment forms (i.e. iframes). A new payment gateway provider called Authorize.NETAPI is now available. When configured as described in *Setup*, the PGA web services will communicate with Authorize.Net's APIs. This allows the PGA and any apps consuming it to display Authorize.Net's payment iframe.



Customers currently using the old Authorize.Net will have to convert to the new Authorize.NetAPI prior to March 30, 2018. When the old gateway is selected from the drop down, a warning will let users know that this gateway will no longer be supported.

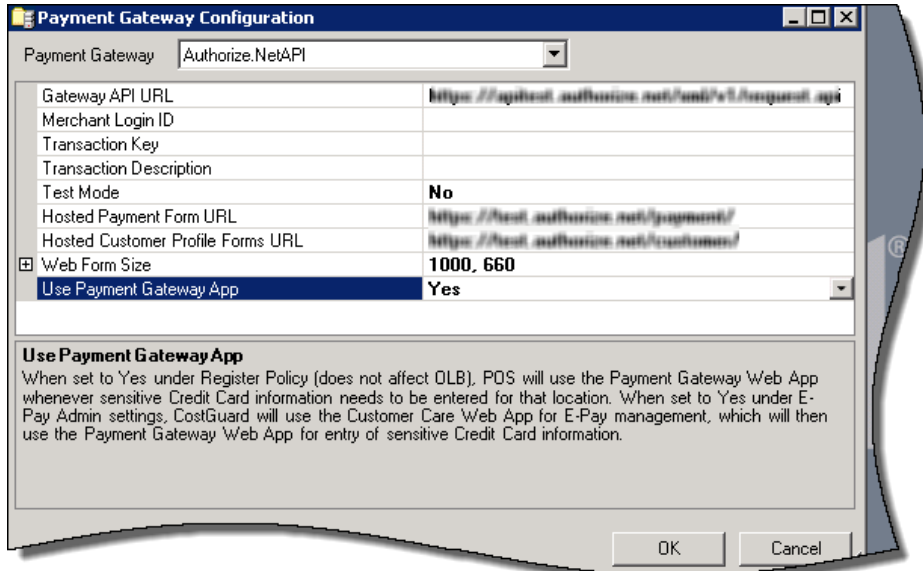


An IDI product article describes recommended process for converting to the new Authorize.NetAPI. This article can be found in the IDI Knowledge Center in ESupport.

2.1.1 GATEWAY SETUP NEW FUNCTIONALITY

Several enhancements were made to PGA functionality originally created under AR 7579.

The *Use Payment Gateway App* (Use PGA) help text was updated to clarify that this setting has no impact on OnlineBill. This means that when a POS register is configured as the OLB register, changing the *Use PGA* setting will have no impact. OnlineBill will always consume the PGA when Authorize.NETAPI is the configured gateway. However, the *Use PGA* setting will have an impact on user experience when changed on non OnlineBill registers or in Admin Console. This impact will be covered in the *Setup* section below.



Payment Gateway Configuration

Payment Gateway: **Authorize.NetAPI**

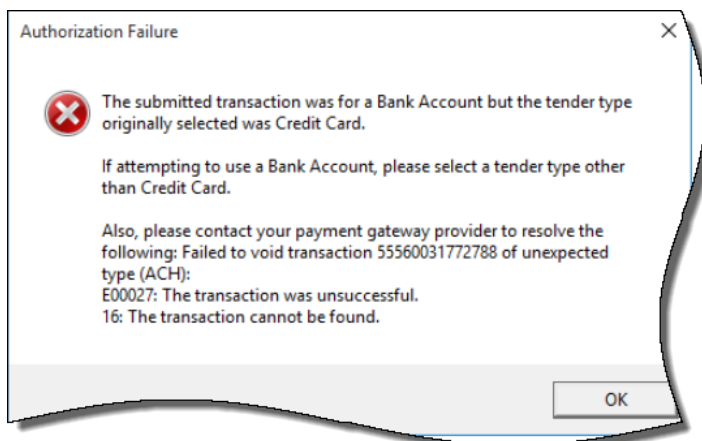
Gateway API URL	https://api.authorize.net/am/v1/authorize.asp
Merchant Login ID	
Transaction Key	
Transaction Description	
Test Mode	No
Hosted Payment Form URL	https://test.authorize.net/payment/
Hosted Customer Profile Forms URL	https://test.authorize.net/customer/
Web Form Size	1000, 660
Use Payment Gateway App	Yes

Use Payment Gateway App
When set to Yes under Register Policy (does not affect OLB), POS will use the Payment Gateway Web App whenever sensitive Credit Card information needs to be entered for that location. When set to Yes under E-Pay Admin settings, CostGuard will use the Customer Care Web App for E-Pay management, which will then use the Payment Gateway Web App for entry of sensitive Credit Card information.


OK Cancel

Also, an update was added in POS to account for the payment type selection in Authorize.NETAPI's iframe. Users must select the tender type in POS (credit card, bank account) however, the iframe will also present users with a payment type selection. The iframe does not support passing in the selected type from POS. This presents a condition where one type can be selected in POS and a different type can be selected in the iframe. To prevent CostGuard from becoming out of sync with the gateway, an error has been added for this situation.

In the PGA iframe you will still see the message *your transaction is processing, please close the browser* after submitting in the PGA; however, POS will detect the mismatch on the response and display an error. The error will direct users to re-tender the transaction using the correct tender type. The error will also advise if the originally attempted transaction was voided successfully or requires manual interaction with the gateway.



Authorization Failure

 The submitted transaction was for a Bank Account but the tender type originally selected was Credit Card.

If attempting to use a Bank Account, please select a tender type other than Credit Card.

Also, please contact your payment gateway provider to resolve the following: Failed to void transaction 55560031772788 of unexpected type (ACH):
E00027: The transaction was unsuccessful.
16: The transaction cannot be found.

OK

POS was also updated to NOT present the PGA browser page when the intent is to swipe the credit card. This functionality is based on the registers associated devices.

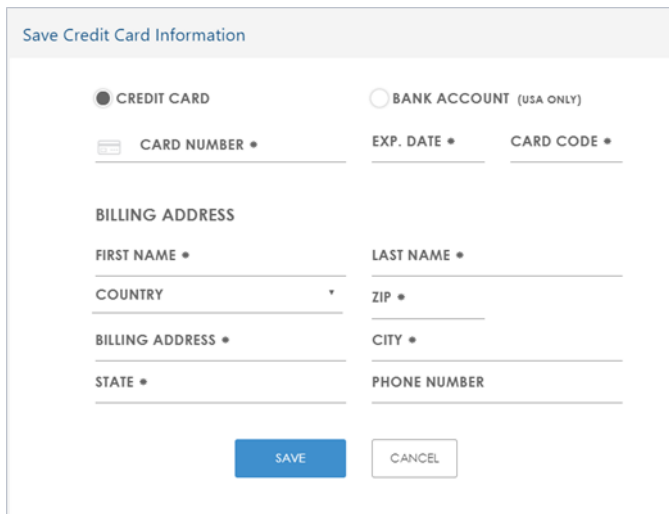
2.2 PGA INTEGRATION WITH COSTGUARD

Customers previously using an iframe in Customer Care or OnlineBill will see little change regarding the PGA integration. The iframe provided by the new Authorize.NETAPI has a slightly different look but all existing functionality remains intact and has not changed. This integration allows Customer Care and OnlineBill users to take advantage of the benefits that the PGA provides. As POS did not use iframe functionality prior to this development, the look and feel for POS users will differ a bit more than for web application users.

2.2.1 USING PGA IN CUSTOMER CARE

Customer Care has been enhanced to use the Payment Gateway application when creating an E-Pay credit card account. This will support the requirements for the Authorize.net changes that are expected in March of 2018. Also, you can set up CostGuard to have Customer Management users be redirected to Customer Care for managing E-Pay accounts.

When you navigate to the E-Pay Accounts page (**BILLING > E-Pay Accounts**), clicking the **NEW+** button opens an iframe dialog (example shown below).



If the payment provider is Authorize.NetAPI (new version of Authorize.NET), the PGA iFrame will be used for creating a credit card account. Even though the iFrame includes an option for Bank Account, this option should not be used. It will result in an error message.

If the provider is Authorize.NET (older version of Authorize.NET), the original iFrame directly called from Customer Care will be used for creating a credit card account.

The functionality to save a credit card in Customer care has not changed. The **SAVE** button in the iFrame submits the form to the PGA. If the PGA completes the save successfully, you will be returned to the Customer Care page where additional E-Pay account attributes are available to populate. You must hit **SAVE** on the Customer Care page to save the account.

2.2.2 REDIRECTING CUSTOMER MANAGEMENT USERS TO CUSTOMER CARE

CostGuard client will redirect users to Customer Care for E-Pay transactions when the **Use Payment Gateway App** setting in Admin Console is set to **Yes**. Also, to successfully redirect, the Base Application URL parameter must be configured in Configuration Console.

Use Payment Gateway App Setting – Admin Console

The path is: Business Rules > Local Services > CostGuardService > *server* > Customer Management > E-Pay > Enhanced PCI Configuration:

The screenshot shows the "Payment Gateway Configuration" window. At the top, there's a title bar with standard Windows icons. Below it, a dropdown menu is set to "Authorize.NetAPI". The main area contains several configuration fields:

- Gateway API URL**: https://apitest.authorize.net/xml/v1/request.api
- Merchant Login ID**: 2 [redacted] .uk
- Transaction Key**: [redacted]
- Transaction Description**: [redacted]
- Test Mode**: No
- Hosted Payment Form URL**: https://test.authorize.net/payment/
- Hosted Customer Profile Forms URL**: https://test.authorize.net/customer/
- Web Form Size**: 1000, 660
- Use Payment Gateway App**: Yes (This row is circled in red)

At the bottom, there's a section titled "Use Payment Gateway App" with explanatory text: "When set to Yes under Register Policy (which does not affect OLB), POS will use the Payment Gateway WebApp whenever sensitive Credit Card information needs to be entered for that location. When set to Yes..." Below this text are two buttons: "OK" and "Cancel".

Base Application URL – Config Console

The **Base Application URL** setting (Web Connections) in Configuration Console must be configured. This was previously the *Orders Link* and has been moved out of the Orders section and relabelled to *Base Application URL*.

Web Connections (WEB_MNP2_ORDERING_MAIN#Web Connection...

Base Application URI http://testing.infodirections.com/orders/web/

Base API URI https://api...tons.com

User Name dlwls_user

Password password

CostGuard Interface

Web Service URL http://api...interface/

Inventory Application

Allow CG Client Inventory ☐

Inventory Link

Orders Application

Use Order Fee ☐

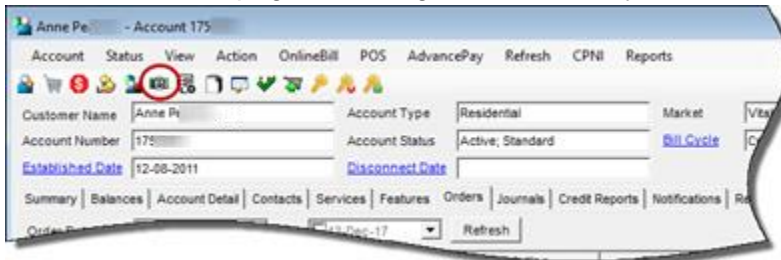
Notes:

- When the *Use Orders App* setting is checked (to use the Orders web module), this needs to contain the Orders application URL. If you're not using the Orders web module, this can be the same as the Base API URI (no module or environment specified).
- The redirect to Customer Care for E-Pay accounts will work whether the URL contains the full path to Order or just the base value.

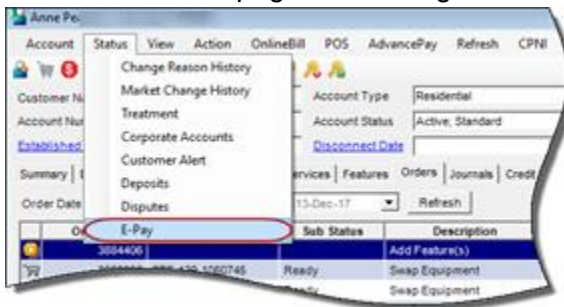
Redirect Points

When CostGuard is set up for redirect as described above, any of the following will result in redirecting users to Customer Care:

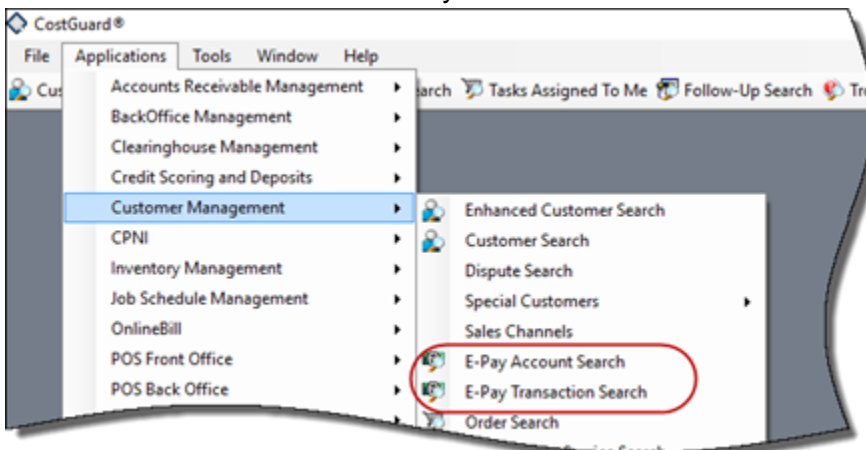
- On the Customer page – clicking the View E-Pay Accounts icon:



- On the Customer page – choosing **Status > E-Pay**:

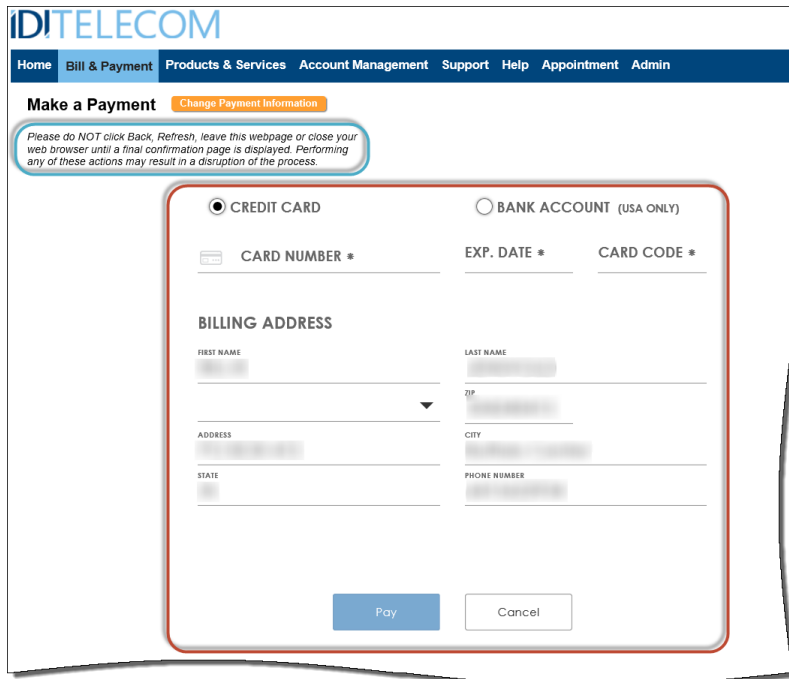


- From the Applications menu, choosing E-Pay Account Search or E-Pay Transaction Search and then selecting an item from the Search Results. The results grid will display in CostGuard client, but clicking on a result or selecting View Customer from the context menu on a result row will redirect you to the account or transaction in Customer Care:



2.2.3 USING PGA IN ONLINEBILL

In the screen shot below the new iframe is highlighted with a red box. The information within the iframe is similar to what users previously experienced. The differences are styling updates as well as configuration changes with Authorize.Net (see *Setup*). The *Please do NOT click back text* highlighted in the blue box used to be a configurable footer option in Authorize.Net's old iframe. The new iframe no longer supports this configurable option so the text has been added to the OnlineBill page.



2.2.4 USING THE PGA IN POS

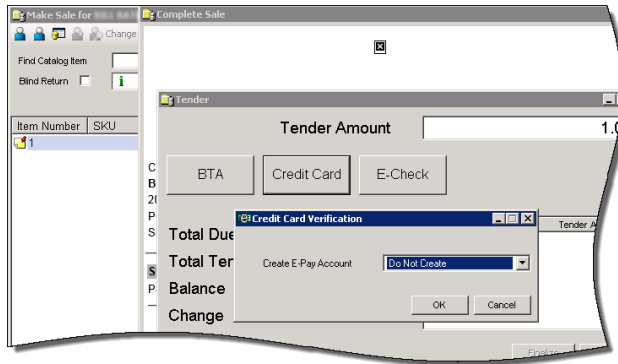
The PGA was developed to solve the requirement of processing credit cards through POS with a hosted iframe. The PGA is a web browser-based application that lets a hosted iframe capture sensitive credit card information.

Having the PGA communicate with the payment provider with a hosted iframe and using the PGA web service means that no sensitive credit card information is stored on IDI databases or passed over IDI networks.

When properly configured (see *Setup*) the following scenarios outline how to tender credit card transaction using the PGA in POS.

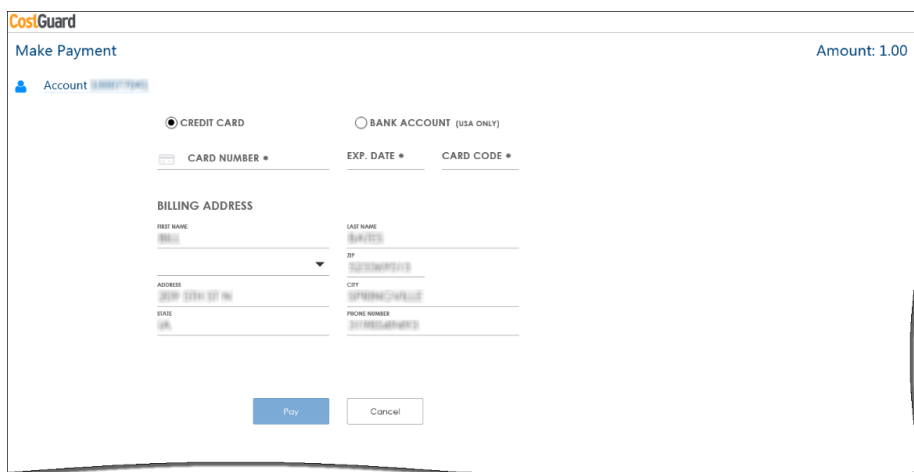
POS Make Sale One-Time Credit Card Transaction

Prior to the PGA, the entire tendering process occurred within the CostGuard Client. Now POS can tender credit cards through the PGA's web service and iframe. On entering and tendering the transaction amount, CostGuard passes customer information and the amount to the PGA web service.

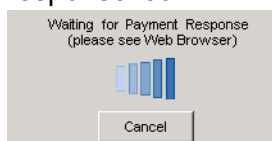


This will trigger the PGA *Make Payment* browser page to open automatically. The *Make Payment* page displays the account number, the amount of the transaction, and the payment iframe. The amount comes from the tender action in POS and can't be changed in the web application. If the amount is incorrect and needs to be changed you'll have to click **CANCEL** to close the browser and return to tendering in POS.

The PGA *Make Payment* page hosts the Authorize.NETAPI iframe. This is where you enter the sensitive credit card information and its associated billing address information and submit the transaction.



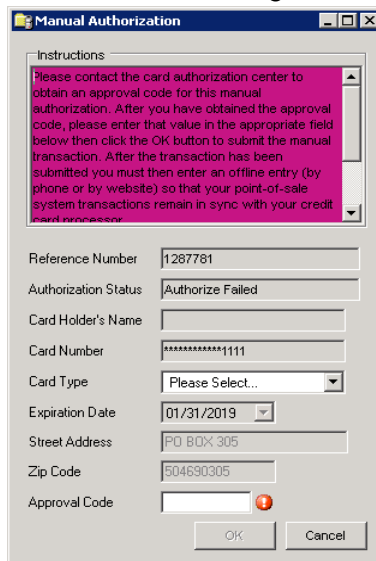
As you enter payment information in the PGA browser pages, POS will display a Pending response icon.



Once you click **SAVE** in the iframe, the PGA Web Service calls the payment gateway API to authorize the amount.

- If the transaction is authorized:
 - The PGA web service will pass the authorization to POS.
 - The credit card tender is displayed on the Tender Form.
 - The PGA web service saves the transaction token returned via the API response.
- If the charge is not authorized the applicable decline or error will be displayed.

Note: You can still manually authorize a card; however, this screen has been updated to only show the last four digits of the credit card number entered in the PGA iframe.



Manual Authorization

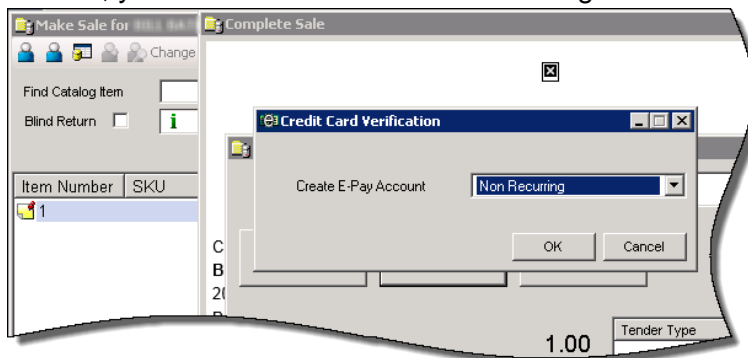
Instructions
Please contact the card authorization center to obtain an approval code for this manual authorization. After you have obtained the approval code, please enter that value in the appropriate field below then click the OK button to submit the manual transaction. After the transaction has been submitted you must then enter an offline entry (by phone or by website) so that your point-of-sale system transactions remain in sync with your credit card processor.

Reference Number: 1287781
 Authorization Status: Authorize Failed
 Card Holder's Name:
 Card Number: *****1111
 Card Type: Please Select...
 Expiration Date: 01/31/2019
 Street Address: PO BOX 305
 Zip Code: 504690305
 Approval Code:
 OK Cancel

POS Make Sale Credit Card Transaction and Create E-Pay Account

When you tender a transaction in POS and choose to create an E-Pay account, CostGuard passes customer information and the amount to the PGA web service. This will trigger the PGA *Make Payment and Save Account* browser page to open automatically. This page will ensure the Credit card is tokenized with the payment processor and the token will be saved in CostGuard for use with the E-Pay account.

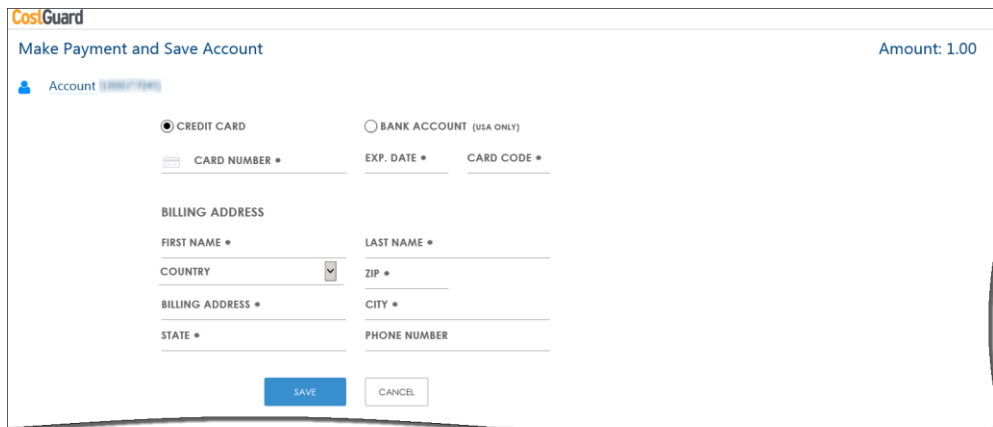
In POS, you can choose to create a recurring or non-recurring E-Pay Account.



Make Sale for [Customer Name] **Complete Sale**

Find Catalog Item:
 Blind Return:
 Item Number: 1
 SKU:
 C:
 B:
 21
 1.00
 Tender Type:
Credit Card Verification
 Create E-Pay Account: Non Recurring
 OK Cancel

Enter the sensitive credit card information, confirm the billing address information and submit the transaction in the PGA (click **SAVE**).



CostGuard
Make Payment and Save Account Amount: 1.00

Account XXXXXXXXXX

☒ CREDIT CARD ☐ BANK ACCOUNT (USA ONLY)

CARD NUMBER * EXP. DATE * CARD CODE *

BILLING ADDRESS

FIRST NAME * LAST NAME *

COUNTRY * ZIP *

BILLING ADDRESS * CITY *

STATE * PHONE NUMBER

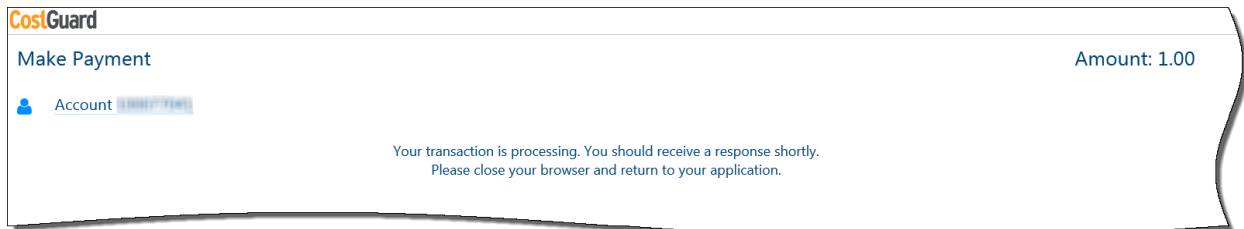
The PGA Web Service calls the payment gateway API to authorize the transaction.

- If the transaction is authorized:
 - The PGA web service will pass the authorization to POS.
 - CostGuard will display the credit card tender on the Tender Form.
 - CostGuard will save the transaction token returned via the API response.
 - CostGuard will make a second call through the PGA Web Service to the payment gateway and adds the card to the repository.
 - If the token is generated:
 - CostGuard will create the account (listed as an available account under E-Pay Accounts).
 - Associate the token returned via the API response to the account.
 - If the token is not generated, display an error message.
- If the transaction is not authorized, display the applicable decline or error message
- If the charge is not authorized display the applicable decline or error.

Submitting and Canceling in the PGA

After you choose to SAVE or CANCEL in the payment iframe, you will receive the corresponding confirmation message:

SAVE:



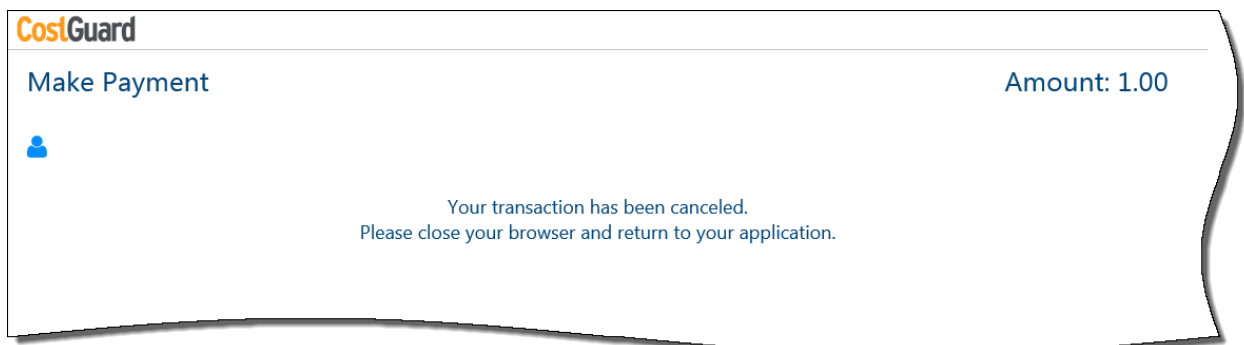
CostGuard

Make Payment Amount: 1.00

Account XXXXXXXXXX

Your transaction is processing. You should receive a response shortly.
Please close your browser and return to your application.

CANCEL:



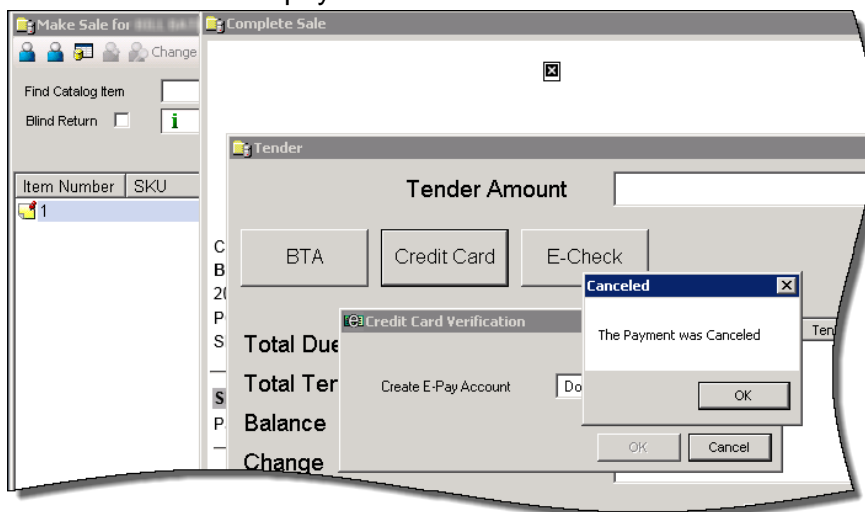
CostGuard

Make Payment Amount: 1.00

XXXXXXXXXX

Your transaction has been canceled.
Please close your browser and return to your application.

POS will indicate the payment was cancelled as well.



Make Sale for XXXX Complete Sale

Find Catalog Item

Blind Return ☐

Item Number	SKU
1	

Tender

Tender Amount

BTA Credit Card E-Check

Total Due

Total Ter

Balance

Change

Canceled

The Payment was Canceled

OK

2.3 PAYMENT GATEWAY WEB APPLICATION – TRANSACTION SEARCH

The Payment Gateway web application lets you search for payment transactions and drill down to view transaction details.

2.3.1 PERMISSIONS

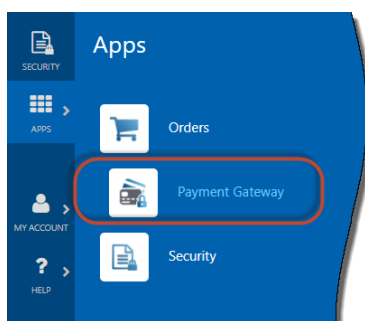
There are two roles related to this functionality as managed via the Security Web Module:

- Role: *Payment Gateway User*, Permissions: *Allow Log On*
- Role: *Payment Gateway Admin*, Permissions: *Allow Log On* and *Administrator*

Both roles let you search for transactions and view details. The Admin role lets you view *all* transaction detail fields, while some fields are hidden from Payment gateway users.

2.3.2 ACCESSING THE PAYMENT GATEWAY WEB APPLICATIONS

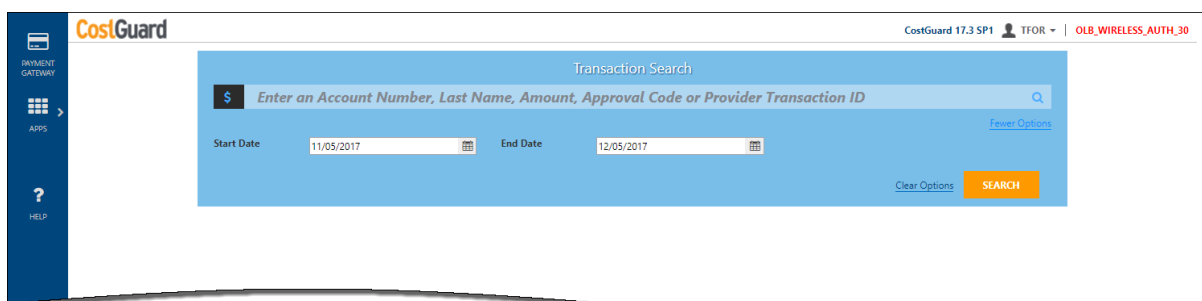
Users with either the Payment Gateway Admin or User role will have the Payment Gateway icon available in their Application Tray.



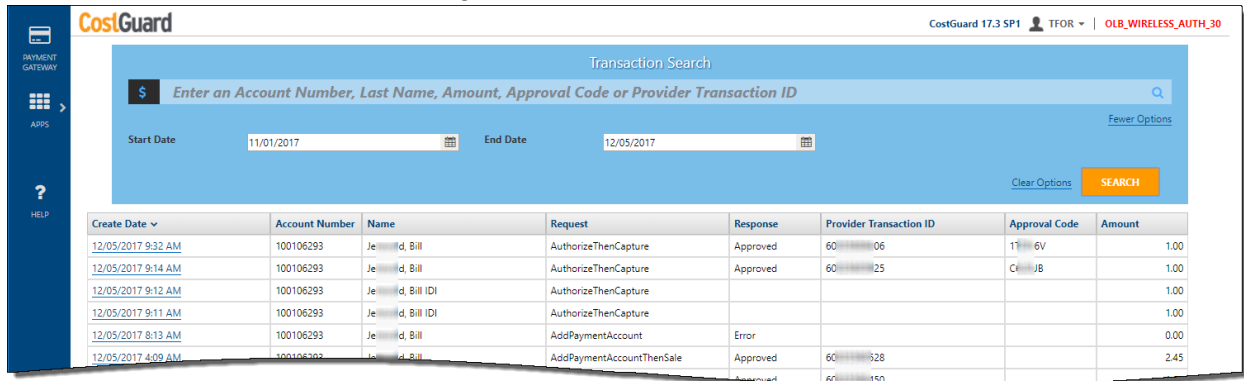
Selecting that icon displays the Payment Gateway OmniSearch page.

2.3.3 PAYMENT GATEWAY OMNISEARCH

You can search for payment transactions by Account Number, Last Name, Amount, Approval Code or Provider Transaction ID. Clicking **More Options** provides fields for limiting search results by Start and End Date. These dates default to the past 30 days.



The Search results list the matching transactions.



Create Date	Account Number	Name	Request	Response	Provider Transaction ID	Approval Code	Amount
12/05/2017 9:32 AM	100106293	Je...d, Bill	AuthorizeThenCapture	Approved	60...06	11...6V	1.00
12/05/2017 9:14 AM	100106293	Je...d, Bill	AuthorizeThenCapture	Approved	60...25	C...JB	1.00
12/05/2017 9:12 AM	100106293	Je...d, Bill IDI	AuthorizeThenCapture				1.00
12/05/2017 9:11 AM	100106293	Je...d, Bill IDI	AuthorizeThenCapture				1.00
12/05/2017 8:13 AM	100106293	Je...d, Bill	AddPaymentAccount	Error			0.00
12/05/2017 4:09 AM	100106302	Je...d, Bill	AddPaymentAccountThenSale	Approved	60...28		2.45

Clicking the Create Date displays the corresponding transaction details. This view has five tabs.

- General

Create Date	Account Number	Name	Request	Response	Provider Transaction ID	Approval Code	Amount
12/05/2017 9:32 AM	1...93	Je...d, Bill	AuthorizeThenCapture	Approved	60...06	11...6V	1.00
12/05/2017 9:14 AM	1...93	Je...d, Bill	AuthorizeThenCapture	Approved	60...25	C...JB	1.00
12/05/2017 9:12 AM	1...93	Je...d, Bill IDI	AuthorizeThenCapture				1.00
12/05/2017 9:11 AM	1...93	Je...d, Bill IDI	AuthorizeThenCapture				1.00
12/05/2017 8:13 AM	1...93	Je...d, Bill	AddPaymentAccount	Error			0.00
12/05/2017 4:09 AM	1...93	Je...d, Bill	AddPaymentAccountThenSale	Approved	60...28		2.45
12/05/2017 4:08 AM	1...93	Je...d, Bill	AuthorizeThenCapture	Approved	60...50		1.00
12/05/2017 4:07 AM	1...93	Je...d, Bill	AddPaymentAccount	Approved			0.00
12/05/2017 4:05 AM	1...93	Je...d, Bill	AddPaymentAccountThenSale	Approved	60...65	Q...T	2.45
12/05/2017 4:04 AM	1...93	Je...d, Bill	AuthorizeThenCapture	Approved	60...29	L...T	1.00

Transaction Detail

GENERAL	PAYMENT DETAIL	GATEWAY SETTINGS	ACTIVITY LOG	ADDITIONAL INFORMATION
<div> <div>Request</div> <div>AuthorizeThenCapture</div> </div> <div> <div>Account Number</div> <div>10...93</div> </div> <div> <div>Provider Transaction ID</div> <div></div> </div> <div> <div>Create Date</div> <div>12/05/2017 9:11 AM</div> </div>				
<div> <div>Response</div> <div></div> </div> <div> <div>Register ID</div> <div>11761</div> </div> <div> <div>Reference</div> <div>test ref field : test ref value</div> </div> <div> <div>User</div> <div>idi_good</div> </div>				
<div> <div>Response Message</div> <div></div> </div>				

- Payment Detail – Note: Account token field is masked.

Transaction Detail

GENERAL	PAYMENT DETAIL	GATEWAY SETTINGS	ACTIVITY LOG	ADDITIONAL INFORMATION
<div> <div>Billing Information</div> <div> <div>Amount</div> <div>1.00</div> </div> </div>				
<div> <div> <div>Requested Payment Type</div> <div>15</div> </div> <div> <div>Tender Type ID</div> <div>15</div> </div> <div> <div>Approval Code</div> <div></div> </div> <div> <div>Account Token</div> <div></div> </div> </div>				

- **Gateway Settings** – This tab is only available for Admin users. The LoginID and Password fields are masked.

Transaction Detail

[GENERAL](#) [PAYMENT DETAIL](#) [GATEWAY SETTINGS](#) [ACTIVITY LOG](#) [ADDITIONAL INFORMATION](#)

Gateway Settings

TargetUrl:	https://apitest.authorize.net/xml/v1/request.api
LoginID:	*****
Password:	*****
CLMHostedURL:	https://test.authorize.net/customer/
OLBTargetRedirectUrl:	https://test.authorize.net/payment/
TestMode:	False
WebFormSize:	0,740

- **Activity Log**

Transaction Detail

[GENERAL](#) [PAYMENT DETAIL](#) [GATEWAY SETTINGS](#) [ACTIVITY LOG](#) [ADDITIONAL INFORMATION](#)

Activity Log

12/05/2017 9:11 AM	iFrameRequested
--------------------	-----------------

- **Additional Information**

Transaction Detail

[GENERAL](#) [PAYMENT DETAIL](#) [GATEWAY SETTINGS](#) [ACTIVITY LOG](#) [ADDITIONAL INFORMATION](#)

Payment Transaction ID

2017-12-05_ca7c1b1b-1b1b-1b1b-1b1b-5da30a37

Provider

Authorize.NetAPI

Request Information

Response Information

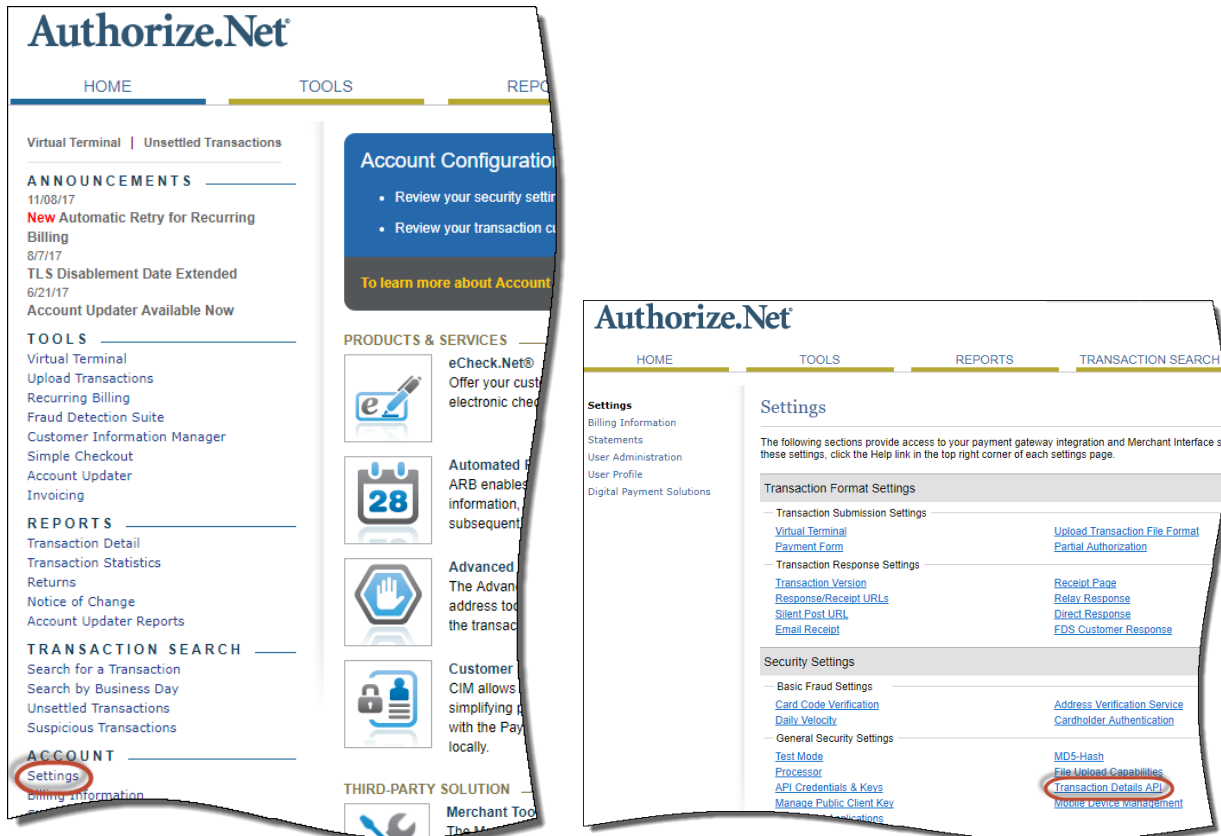
Additional Information

addl info:	test addl info
------------	----------------

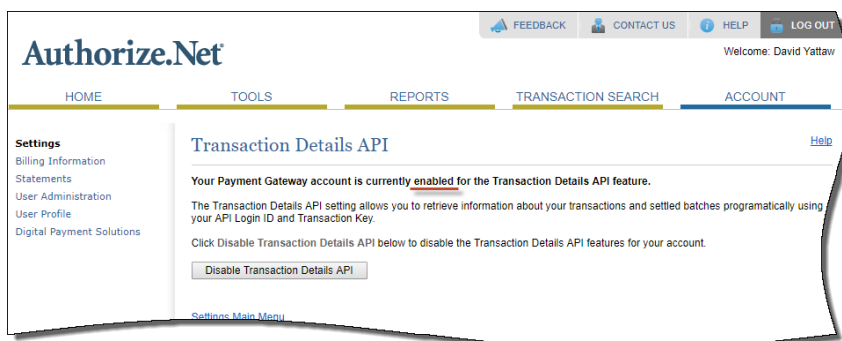
2.4 SETUP

2.4.1 SETUP IN THE AUTHORIZE.NET PORTAL

Prior to converting to the new Authorize.NET API gateway, you must enable the Transaction details API for your Authorize.Net account. To do this, log into Authorize.Net, select **Settings** under the Account section then select **Transaction details API**.



From the Transaction details API screen click the button to enable this API.



Obsolete Authorize.Net Portal Settings for OnlineBill

NOTE: Authorize.NET portal settings previously configured to use Authorize.Net with OnlineBill no longer apply. These settings include Payment Form settings, response/receipt values, and MD5 Hash values. There is no need to remove these configurations as Authorize.NetAPI will ignore them.

Payment Form

The following sections allow you to configure your Payment Form.

Click on any of the sections below to configure specific details.

[Color and Font Settings](#)
Define the background color, text colors, and font styles to be displayed on the Payment Form.

[Header](#)
Define the text that will be displayed at the top of the Payment Form.

[Form Fields](#)
Select the fields that will be displayed on the Payment Form.

[Footer](#)
Define the text that will be displayed at the bottom of the Payment Form.

[Settings Main Menu](#)

MD5 Hash

If you would like your transaction responses to be encrypted by the Payment Gateway, you must set an MD5 Hash value.

For more information about the MD5 Hash, please refer to [Reference & User Guide](#).

Hash Value Set: Yes

New Hash Value:

Confirm Hash Value:

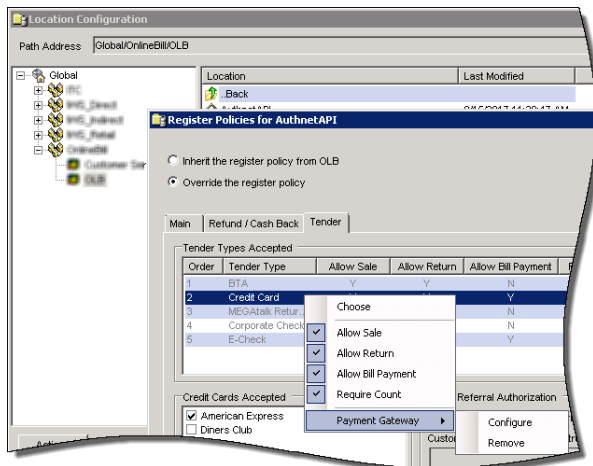
Response/Receipt URLs [Help](#)

The Payment Gateway verifies the URL specified in the post string against the URLs in this list. If the URL provided does not match one of the values on this list, the transaction will be rejected. If no URL is provided, the Default URL value will be used.

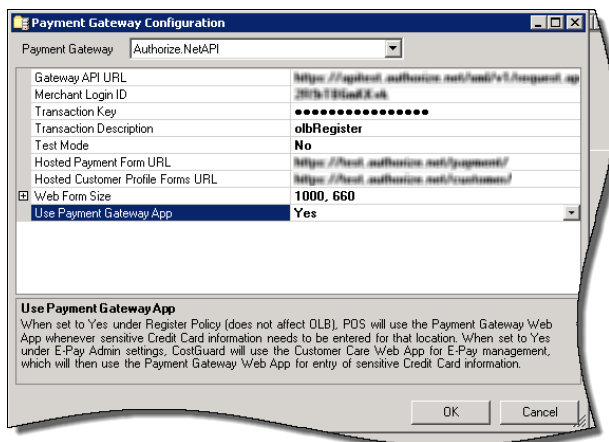
URL		Add URL
(Click Edit to define a default URL value.)	Default Receipt URL	Edit
(Click Edit to define a default URL value.)	Default Relay Response URL	Edit

2.4.2 USE PAYMENT GATEWAY APP SETTING IN POS

You can configure and use the PGA with POS through each of your locations' register policies. Navigate to **Applications > POS Back Office > Locations**, then drill down to the desired location and right click to view the register policy. Next, on the tender tab of the register policy, right click on credit card and select **Payment Gateway > Configure**.



Select **Authorize.NetAPI** from the Payment Gateway dropdown and configure the URLs, Login ID, and Transaction Key with your gateway account information.



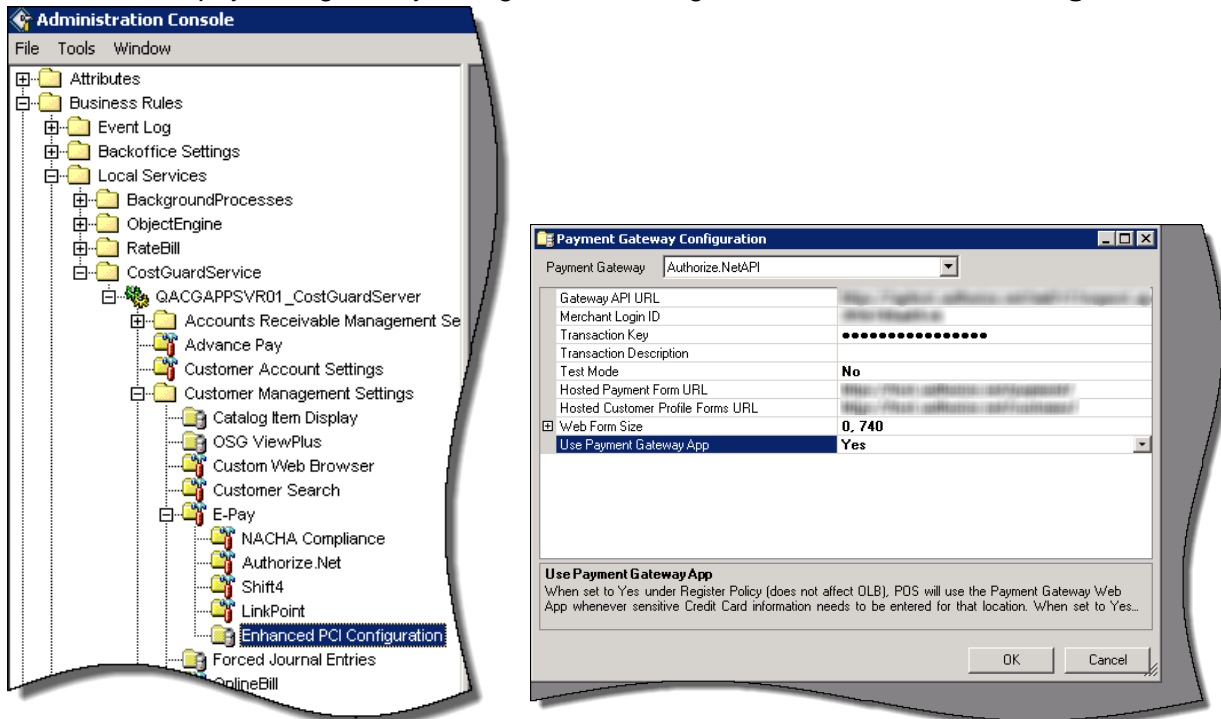
The *Use Payment Gateway App* setting is what triggers POS to use the PGA web application for tendering Credit Cards. When set to **Yes**, POS will launch the PGA web application when a credit card is tendered. The PGA will then handle the communication to Authorize.NETAPI. When this setting is set to **No**, POS will tender credit cards as it has in the past. The CostGuard client will communicate with Authorize.NetAPI via APIs and web services.

The default value for *Use Payment Gateway App* is **No**.

2.4.3 USE PAYMENT GATWEWAY APP SETTING IN ADMIN CONSOLE

The payment gateway configurations for E-Pay transactions are in the Admin Console. These settings are only available to IDI so you'll require assistance from IDI to configure these settings.

To access the payment gateway configurations, navigate to **Enhanced PCI Configuration**.

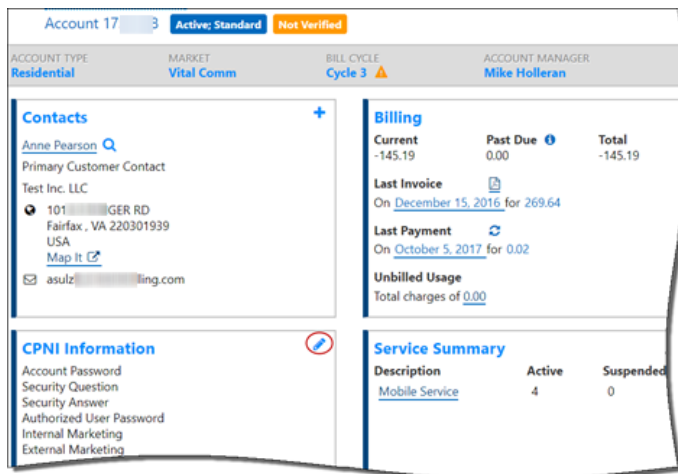


The *Use Payment Gateway App* setting is what triggers CostGuard Client to re-direct users to the Care web application when set to **Yes** in Admin. Additional IDI internal configuration is required for the re-redirect to occur. This is described in *Redirecting Customer Management Users to Customer Care*.

3 Customer Care Web Module

3.1 ABILITY TO EDIT CPNI INFORMATION

A new Edit CPNI Information permission supports editing CPNI information via the Customer Summary page. This permission has been added to the Customer Care *Admin* role. This lets you grant users the ability to edit CPNI information without also granting them full access to customer information. Users with this permission will have a pencil icon in the right corner of the CPNI info panel.



Account 17 Active; Standard Not Verified

ACCOUNT TYPE: Residential MARKET: Vital Comm BILL CYCLE: Cycle 3 ACCOUNT MANAGER: Mike Holleran

Contacts

Anne Pearson
Primary Customer Contact
Test Inc. LLC
101 GER RD
Fairfax, VA 220301939
USA
Map It
asulzling.com

Billing

Current: -145.19 Past Due: 0.00 Total: -145.19

Last Invoice: On December 15, 2016 for 269.64

Last Payment: On October 5, 2017 for 0.02

Unbilled Usage: Total charges of 0.00

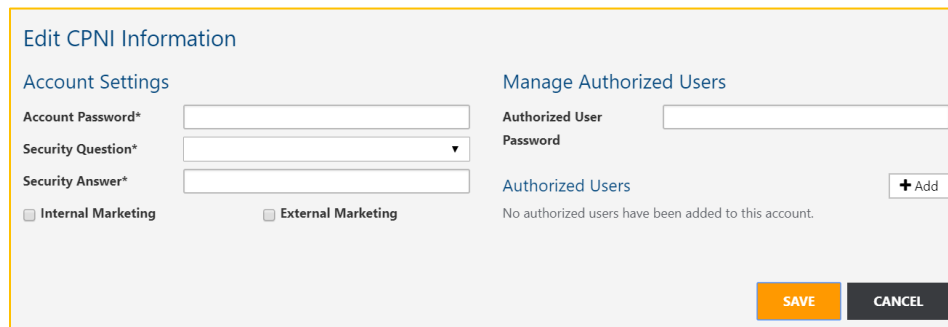
CPNI Information

Account Password
Security Question
Security Answer
Authorized User Password
Internal Marketing
External Marketing

Service Summary

Description	Active	Suspended
Mobile Service	4	0

Clicking this icon opens a dialog that lets you edit the CPNI information.



Edit CPNI Information

Account Settings

Account Password*

Security Question*

Security Answer*

☐ Internal Marketing ☐ External Marketing

Manage Authorized Users

Authorized User

Password

Authorized Users

No authorized users have been added to this account.

Notes:

- The existing Manage Customers permission will not change. This permission will continue to let users edit customer information on the Account Details page, including CPNI information.
- The new Edit CPNI Information permission will not allow users to edit CPNI information from the Account Details page. It only applies to the Customer Summary page.

4 Orders Web Module

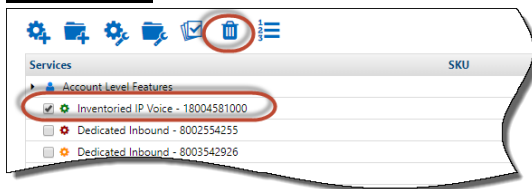
4.1 CANCEL UNUSED SERVICE NUMBER INVENTORY RESERVATIONS

Prior to version 18.1, while assembling an Order, if a Service was assigned a reserved Service Number from inventory and was then subsequently removed from the Order, you were not able to release the unused reservation directly in the Orders web module. Rather, you would have to use the CostGuard Client to do this. With 18.1, when removing a Service from an Order you can choose to release the reserved Service Number directly in the Orders web module. Similar functionality on the Order Summary page cancels reservations when you cancel an Order that had been submitted with reserved Service Numbers.

4.1.1 ORDER ASSEMBLY

When you choose to remove a Service from the Order, either via the bulk select function or via the Service Details pane, with the 18.1 release, the confirmation dialog has a new check box that lets you choose to release reservations associated with the Services being removed.

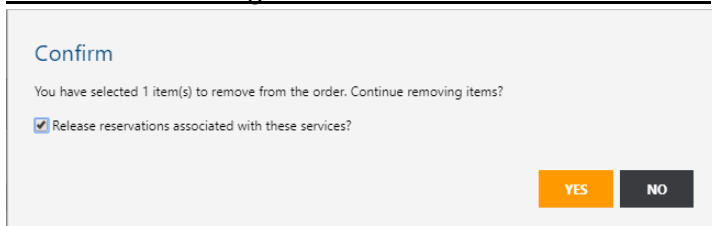
Bulk Select



Service Details pane



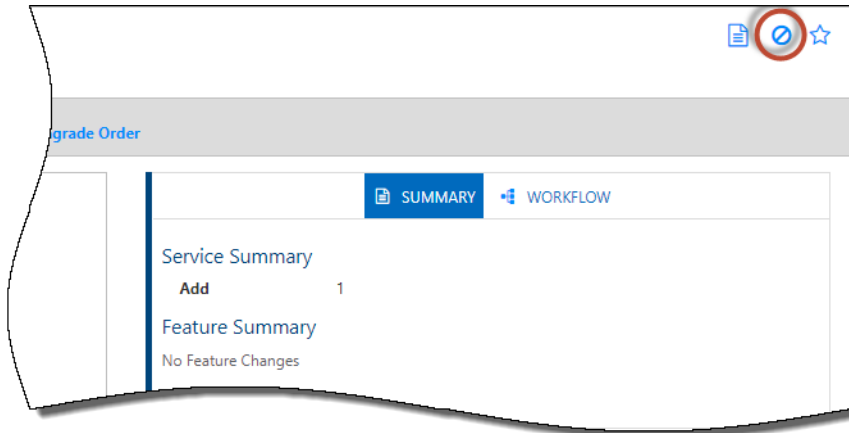
Confirmation Dialog with Release Reservations Check Box



Note: Not checking this check box will save the reservation for this order. If you decide to allocate the service number(s) to another service, they will be immediately available for use.

4.1.2 CANCELING A SUBMITTED ORDER

A new icon is available in the upper right-hand corner of the Order Summary page that lets you cancel in-process Orders. **Note:** Updates can be made until the *Billing System Update* action has been completed by Workflow, or the Order status is *Complete*. In either of these cases, the order will be read only.



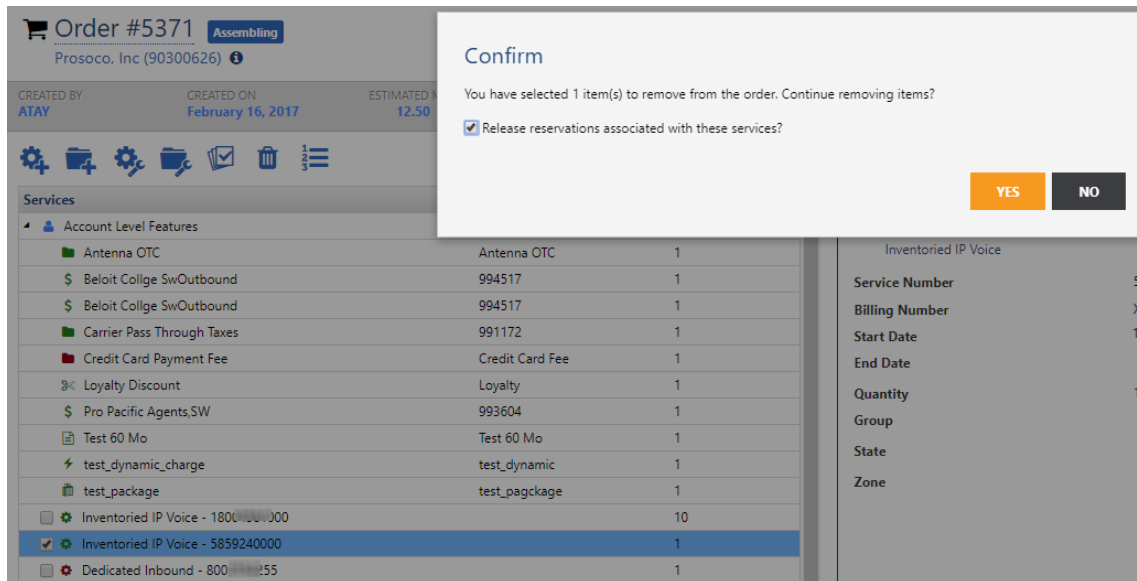
When you cancel an Order:

- The associated Workflow is cancelled along with any unfinished steps
- Service Number Inventory Reservations on the order are cancelled
- If the Billing System Update action has completed, manual clean-up may be required
- The cancelled order cannot be edited

Note: Any cancelled reservation that was saved as part of the order, is released and available for re-use, immediately for general service number inventory fulfilment. See the example below.

Example: Cancelled Reservation Released and Immediately Available for Use

In the screen shot below, Inventoried IP Voice 5859244000 is removed from the Order and the reservation is released.



Confirm

You have selected 1 item(s) to remove from the order. Continue removing items?

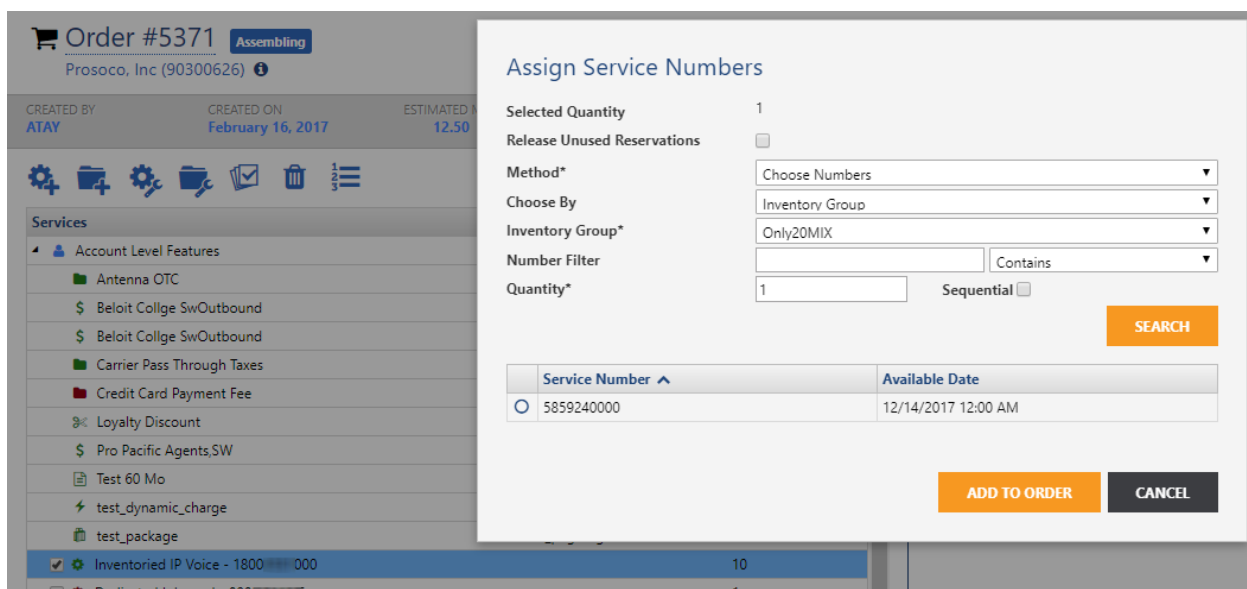
☒ Release reservations associated with these services?

YES **NO**

Services		
Account Level Features		
Antenna OTC	Antenna OTC	1
\$ Beloit Collge SwOutbound	994517	1
\$ Beloit Collge SwOutbound	994517	1
Carrier Pass Through Taxes	991172	1
Credit Card Payment Fee	Credit Card Fee	1
Loyalty Discount	Loyalty	1
\$ Pro Pacific Agents,SW	993604	1
Test 60 Mo	Test 60 Mo	1
test_dynamic_charge	test_dynamic	1
test_package	test_package	1
<input type="checkbox"/> Inventoried IP Voice - 1800-000-0000		10
<input checked="" type="checkbox"/> Inventoried IP Voice - 5859244000		1
<input type="checkbox"/> Dedicated Inbound - 800-000-0000		1

Inventoried IP Voice	
Service Number	5859244000
Billing Number	XX
Start Date	12/14/2017
End Date	
Quantity	1
Group	
State	
Zone	

In a subsequent *Choose Service Number* step in the same Order, 5859244000 is immediately available to be chosen.



Assign Service Numbers

Selected Quantity: 1

Release Unused Reservations: ☐

Method*: Choose Numbers

Choose By: Inventory Group

Inventory Group*: Only20MIX

Number Filter: Contains

Quantity*: 1 Sequential ☐

SEARCH

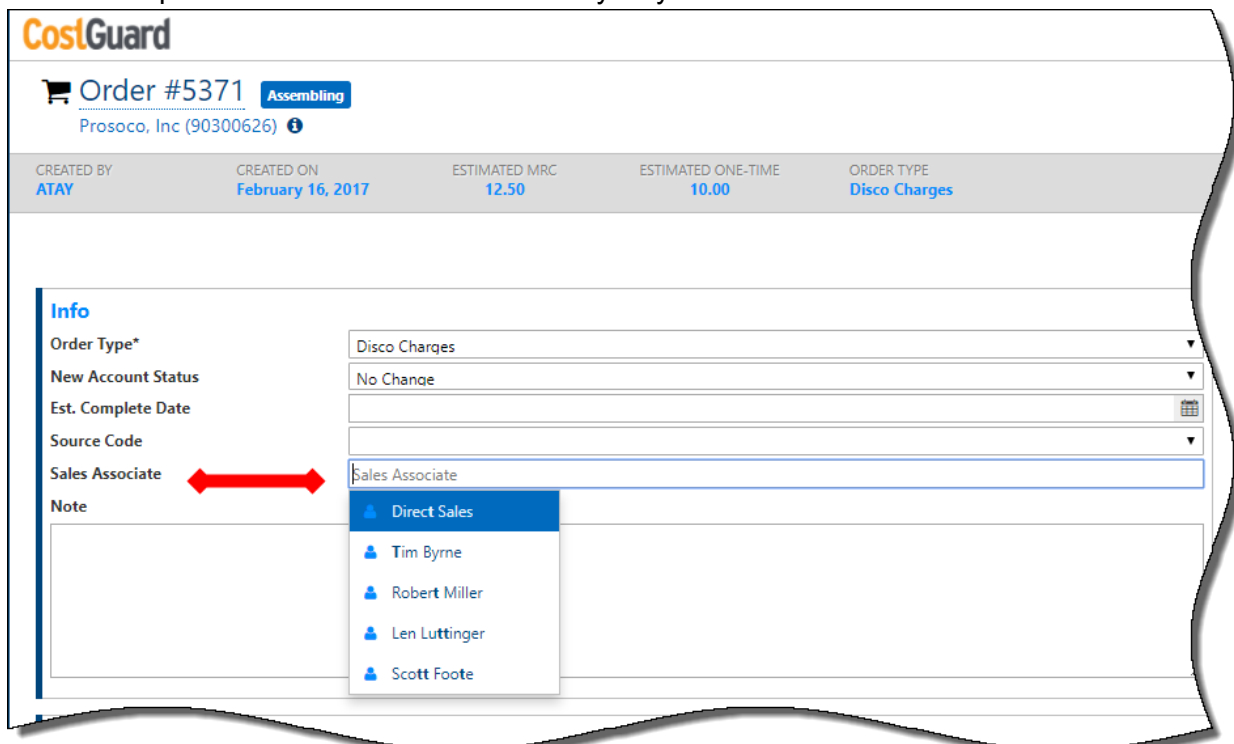
Service Number	Available Date
<input type="radio"/> 5859244000	12/14/2017 12:00 AM

ADD TO ORDER **CANCEL**

4.2 MAKING SALES ASSOCIATE AVAILABLE IN ORDERS

This lets users identify and associate a sales person to an Order. This facilitates downstream reporting for sales commissions and so on.

A new field has been added to the Orders Summary page, in the Info Panel, to capture the Sales Associates. Since Sales Associates already exist in Customer Care, type-ahead functionality facilitates finding existing associates. This information is saved with the Order but does not impact the customer's account in any way.



CostGuard

Order #5371 Assembling
Prosoco, Inc (90300626) ⓘ

CREATED BY	CREATED ON	ESTIMATED MRC	ESTIMATED ONE-TIME	ORDER TYPE
ATAY	February 16, 2017	12.50	10.00	Disco Charges

Info

Order Type* Disco Charges ▼

New Account Status No Change ▼

Est. Complete Date

Source Code ▼

Sales Associate ↔ Sales Associate

Note

- Direct Sales
- Tim Byrne
- Robert Miller
- Len Luttinger
- Scott Foote

5 Notifications on Enrolling in Recurring Auto-pay

CostGuard can be set up to send a notification when a customer enrolls their E-Pay account in recurring auto-pay. This allows for a notification to be sent regardless of what application updated the E-Pay account (OnlineBill, Customer Care, CostGuard Client).

The solution leverages Workflow Trigger functionality with the existing *Send Notification* Workflow Action. **Note:** The *Send Notification* Action uses the CostGuard Notification engine. CostGuard Notifications were chosen to support SMS (the CostGuard Communications platform does not yet support SMS).

Two New Workflow Triggers are available in the Workflow Trigger gallery:

- E-Pay Account Created
- E-Pay Account Modified

A configuration option in Customer Care lets you enable/disable notifications for E-Pay auto-pay enrollment. This option applies to OnlineBill and CostGuard Client, as well as Customer Care, so it must be configured even if you don't use Customer Care. Enabling this option instantiates two Workflow Triggers in your system:

- *E-Pay Account Created* with Action = *Send Notification*
- *E-Pay Account Modified* with Action = *Send Notification*

Note: The *E-Pay Account Created* and *E-Pay Account Modified* triggers can also be used with other Workflow actions to support other business needs.

CostGuard Client changes have been made to support notifications for E-Pay accounts:

- New Data Source: E-Pay Account Notifications
- Template: Sample SMPP Notification template for E-Pay Account Notifications

5.1 SETUP

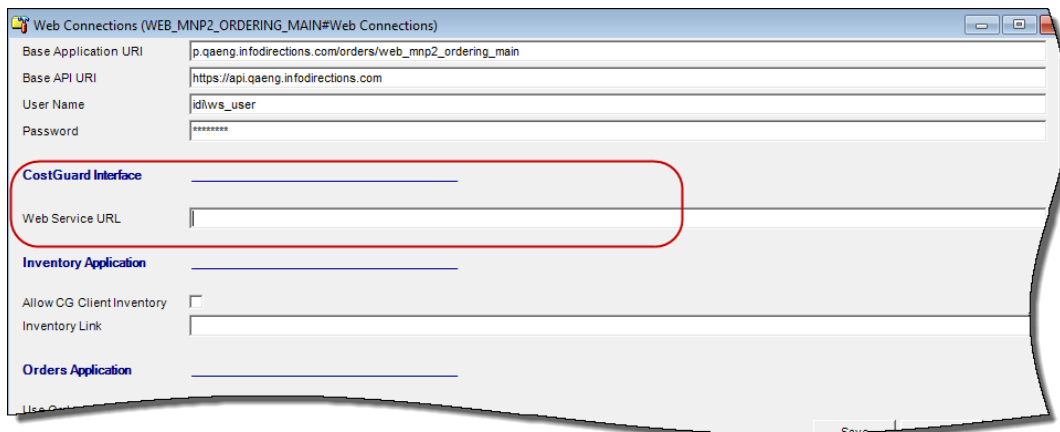
Note: You should already be using customer notifications, and have the delivery method set up in Admin Console. If this is not already in place, additional setup will be needed.

5.1.1 WEB SERVICE URL - CONFIGURATION CONSOLE

This setting is required for the Workflow Trigger functionality to work. It is only available to authorized IDI associates. Configure the Web Service URL via

Web Connections > CostGuard Interface

Set the value to: **http://<application server>/CostGuardInterface/**



Web Connections (WEB_MNP2_ORDERING_MAIN#Web Connections)

Base Application URI: p.qaeng.infodirections.com/orders/web_mnp2_ordering_main

Base API URI: https://api.qaeng.infodirections.com

User Name: idlws_user

Password: *****

CostGuard Interface

Web Service URL:

Inventory Application

Allow CG Client Inventory: ☐

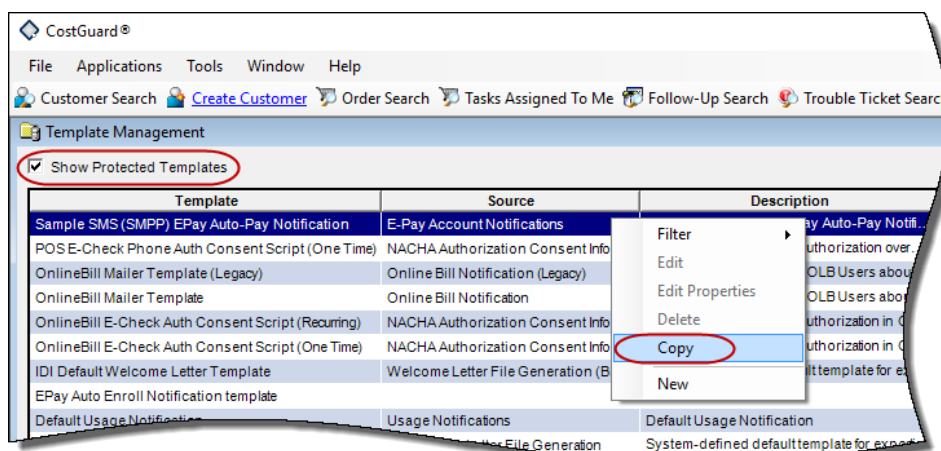
Inventory Link:

Orders Application

5.1.2 NEW SAMPLE TEMPLATE - COSTGUARD CLIENT

A new sample template called *Sample SMS (SMPP) EPay Auto-Pay Notification* lets you specify custom text for the notifications. The template works with the SMPP delivery method. The path is: *Backoffice Management > Customer Notifications > Manage Templates*

The *Show Protected Templates* checkbox must be checked to see this sample template. Because the template is protected, you need to make a copy in order to make customizations.



CostGuard®

File Applications Tools Window Help

Customer Search Create Customer Order Search Tasks Assigned To Me Follow-Up Search Trouble Ticket Search

Template Management

☒ Show Protected Templates

Template	Source	Description
Sample SMS (SMPP) EPay Auto-Pay Notification	E-Pay Account Notifications	E-Pay Auto-Pay Notif...
POSE-Check Phone Auth Consent Script (One Time)	NACHA Authorization Consent Info	Authorization over...
OnlineBill Mailer Template (Legacy)	Online Bill Notification (Legacy)	OLB Users about...
OnlineBill Mailer Template	Online Bill Notification	OLB Users about...
OnlineBill E-Check Auth Consent Script (Recurring)	NACHA Authorization Consent Info	Authorization in C...
OnlineBill E-Check Auth Consent Script (One Time)	NACHA Authorization Consent Info	Authorization in C...
IDI Default Welcome Letter Template	Welcome Letter File Generation (B...	it template for e...
EPay Auto Enroll Notification template		
Default Usage Notification	Usage Notifications	Default Usage Notification
	Letter File Generation	System-defined default template for exp...

Filter Edit Edit Properties Delete Copy New

Note: The template text is used in both the *account created* and *account updated* notification. If you need different text for each notification, you'll need to create two separate templates. Some additional Trigger configuration will also be needed.

New E-Pay Account Notifications Data Source

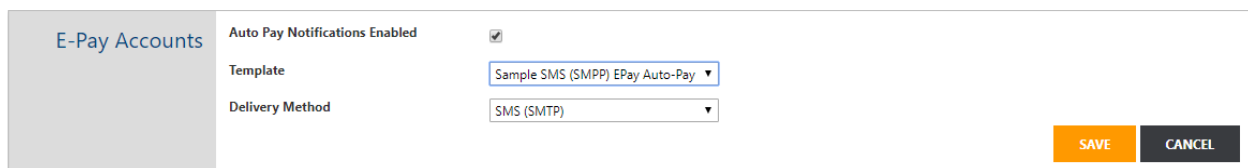
This data source can be used in customer notification templates. It contains the following fields:

- EPayAccountID
- BankAccountType
- CustID
- CustomerAccountNumber
- CustomerName
- CustomerPrimaryContactPhone1
- CustomerPrimaryContactPhone1Type
- CustomerPrimaryContactPhone1TypeID
- CustomerPrimaryContactEmail1
- PrimaryServiceNumber
- EPayAccountDescription
- EPayAccountNumber
- EPayAccountExpirationDate
- EPayAccountRecurringEndDate
- EPayAccountRecurringStartDate
- EPayAccountRecurringStatus

5.1.3 ENABLE/DISABLE SETTINGS - CUSTOMER CARE

Note: *Auto Pay Notifications* must be enabled in Customer Care. This setup is required whether or not you use Customer Care. If you don't use Customer Care, the setup may be performed for you by an IDI associate. Enabling this setting creates two Workflow triggers with accompanying Send Notification actions that drive this functionality in *all* areas where it is supported (CostGuard Client, OnlineBill and Customer Care).

The *Auto Pay Notifications* setting is disabled (unchecked) by default. The setting is located under **Manage > Settings**. Access to this setting requires the *Manage Settings* permission in Customer Care.



To enable,

- Check *Auto Pay Notifications Enabled*. This creates the Workflow Triggers and their accompanying *Send Notification Actions*. Once enabled, disabling this setting will delete the triggers.
- Select the custom template you set up for this purpose.
 - Only templates associated with the E-Pay Account Notifications data source will be available for selection.
 - If you use two different templates for *account created* and *account updated* notifications, you can only select one here, and it will be used when creating both Workflow Triggers. A user with access to Workflow can then modify one of Triggers to use a different template.
- Select the Delivery Method. Options are SMS (SMPP), SMS (SMTP) or Email.

5.1.4 MORE ON THE WORKFLOW TRIGGERS (AND ACCOMPANYING ACTIONS)

The Triggers (left side) are populated exactly as shown below. The properties available to filter on include: BankAccountTypeID, ContactID, CreditCardTypeID, CustomerID, EndDate, IsDeleted, IsTerminated, LastModifiedDate, LastModifiedUser, PaymentAccountID, RecurringEndDate, RecurringStartDate, RecurringStatus, RemittanceTypeID, StartDate.

The associated Actions (right side) are populated based on the parameters entered when the E-Pay Accounts setting was saved.

The Triggers do not require any further configuration unless you're using two different templates for *account created* and *account updated* notifications. In this case you'll need to change the Template specification in the applicable Action.

- |System E-Pay Auto Pay| Account Created Auto Pay Enrollment Handler:

Configure Trigger

[EDIT](#)

Name |System E-Pay Auto Pay| Account Created Auto Pay Enrollment Handler

Description This trigger was generated by CustomerCare to handle E-Pay AutoPay enrollment notifications. Please do not delete or alter this trigger.

Enabled ☐

E-Pay Account Created

Filters

All of the following rules:

RecurringStatus = Recurring

Send Notification

Parameters

Template Name* Sample SMS (SMPP) EPay Auto-Pay Notification

Type* other

ObjectID* @[PaymentAccountID]

Delivery Type* sms_smpp

- |System E-Pay Auto Pay| Account Modified Auto Pay Enrollment Handler

Configure Trigger

[EDIT](#)

Name |System E-Pay Auto Pay| Account Modified Auto Pay Enrollment Handler

Description This trigger was generated by CustomerCare to handle E-Pay AutoPay enrollment notifications. Please do not delete or alter this trigger.

Enabled ☐

E-Pay Account Modified

Filters

All of the following rules:

RecurringStatus = Recurring

RecurringStatus_Old = Non-Recurring

Send Notification

Parameters

Template Name* Sample SMS (SMPP) EPay Auto-Pay Notification

Type* other

ObjectID* @[PaymentAccountID]

Delivery Type* sms_smpp

5.1.5 NOTE FOR TESTING

The Config Console provides a Test Mode setting for each delivery method in the Delivery Configuration dialog. The path is:

Local Service >Background Processes> Customer Notifications > Delivery Configuration

In a non-production environment, the Test Mode setting should be checked to prevent messages going out to customers. Unchecking the Test Mode setting in a non-production environment should be carefully coordinated.

6 Wholesale Billing

CostGuard allows companies that provide wholesale services to also offer billing services for their reseller's end-customers. CostGuard will track:

- the cost to the service provider for usage and features being consumed
- the wholesale price being offered to the reseller
- the final retail price paid by the end-customer

Using this information, a provider can track the margins they are earning in their wholesale agreements, as well as the margins the reseller is earning by selling to the end-customer.

6.1 WHOLESALE FIELDS

CostGuard uses three values on usage and features to track the different charges that are used in Wholesale Billing:

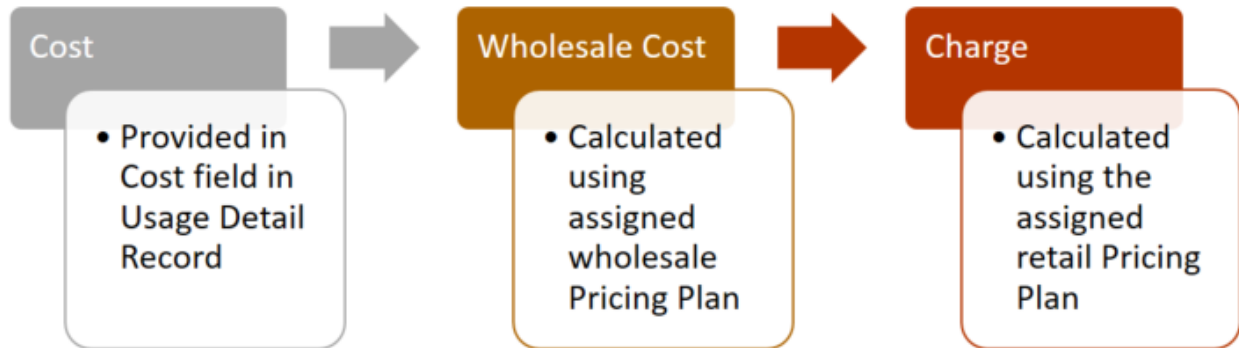
- **Cost** - The amount it costs the service provider to deliver the service. This information is calculated outside of CostGuard, but can be stored on usage and features for reference and reporting.
- **Wholesale Cost** - The amount the service provider is charging the reseller for the service. For usage, this is calculated by CostGuard based on configured wholesale Pricing Plans. For features, this is set by the service provider.
- **Charge** - The amount the end-subscriber is being charged by the reseller. For usage, this is calculated by CostGuard based on configured retail Pricing Plans. For features, this is set by the service provider.

6.2 COSTGUARD CLIENT SUPPORT FOR WHOLESALE COST

Wholesale Cost can be configured in the Product Catalog; however, it is not displayed on accounts or orders within CostGuard Client. Users who need to view or override a Wholesale cost field must use the Customer Care or Orders web module.

6.3 TRACKING WHOLESALE USAGE

6.3.1 WHOLESALE USAGE OVERVIEW



6.3.2 COST

Cost for a usage record is tracked by populating the cost value in the usage detail record sent to CostGuard for rating. CostGuard will identify the Cost provided on the original source record and preserve this through to the rated usage record.

Usage Details			
BASIC		RATING	
Service Number	63	Date	11/01/2017 9:36 PM
Usage Type: Local			
Charge	0.03	Pricing Plan	Corp Dom Calling
Chargeable Units	6	Rate Period	Evening
Charged Units	60	Rate Plan Detail ID	297367
Pre-Discount Charge	0.03	Surcharge	0
Pre-Discount Charged Units	60	Rating Flags	6
Unit Type	Seconds	Regional	No
Unit Sub-Type	Seconds	Cost	.025

Figure 1 Rated Usage Record Displayed in Customer Care

6.3.3 WHOLESALE COST

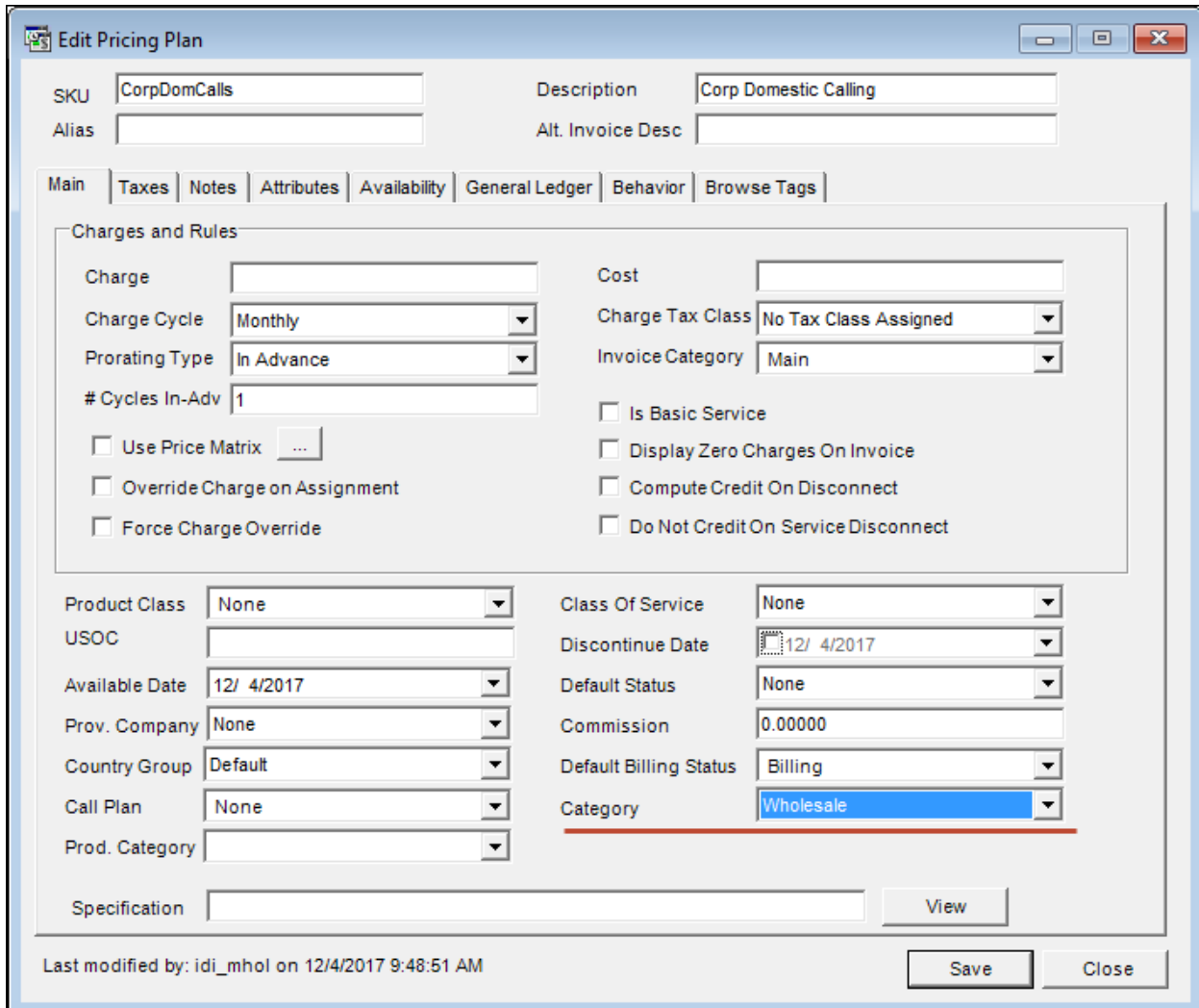
Wholesale Cost for usage is calculated by assigning a wholesale Pricing Plan to either the service or the customer. When CostGuard detects an applicable wholesale Pricing Plan is assigned, it will calculate the rate and store it in the Wholesale Cost field on the record.

Usage Details			
«		BASIC	RATING »
Service Number	1898728	Date	12/07/2012 11:55 AM
Usage Type: Domestic 1+			
Charge	0.46	Pricing Plan	DLD50108 Ded 1 + /
Chargeable Units	342		.0200
Charged Units	342	Rate Period	Day
Pre-Discout Charge	0.46	Rate Plan Detail ID	73660
Pre-Discout Charged Units	342	Surcharge	0
Unit Type	Seconds	Rating Flags	0
Unit Sub-Type	Seconds	Regional	No
		Cost	0.3831
		Wholesale Cost	.0200

A Wholesale Pricing Plan is configured and assigned like a retail pricing plan, except when you create the Wholesale plan it you must specifically indicate it will be used for wholesale.

Configuring Wholesale Pricing Plans using Pricing Plan Categories

Customers using Pricing Plan Categories can configure a Plan to handle Wholesale rating by setting the Category to Wholesale.



The screenshot shows the 'Edit Pricing Plan' window with the following configuration:

- SKU:** CorpDomCalls
- Description:** Corp Domestic Calling
- Alias:** (empty)
- Alt. Invoice Desc:** (empty)
- Tabs:** Main | Taxes | Notes | Attributes | Availability | General Ledger | Behavior | Browse Tags
- Charges and Rules:**
 - Charge:** (empty)
 - Charge Cycle:** Monthly
 - Prorating Type:** In Advance
 - # Cycles In-Adv:** 1
 - ☐ Use Price Matrix
 - ☐ Override Charge on Assignment
 - ☐ Force Charge Override
 - Cost:** (empty)
 - Charge Tax Class:** No Tax Class Assigned
 - Invoice Category:** Main
 - ☐ Is Basic Service
 - ☐ Display Zero Charges On Invoice
 - ☐ Compute Credit On Disconnect
 - ☐ Do Not Credit On Service Disconnect
- Product Class:** None
- USOC:** (empty)
- Available Date:** 12/ 4/2017
- Prov. Company:** None
- Country Group:** Default
- Call Plan:** None
- Prod. Category:** (empty)
- Class Of Service:** None
- Discontinue Date:** 12/ 4/2017
- Default Status:** None
- Commission:** 0.00000
- Default Billing Status:** Billing
- Category:** Wholesale
- Specification:** (empty)
- Buttons:** View, Save, Close
- Status Bar:** Last modified by: idi_mhol on 12/4/2017 9:48:51 AM

Figure 2 Configuring a Pricing Plan as Wholesale

6.3.4 CHARGE

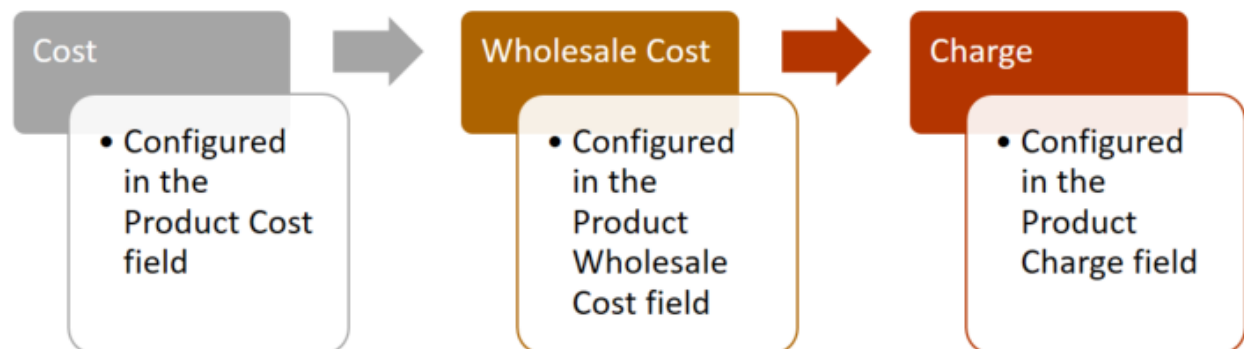
In Wholesale Billing, the Charge for usage is calculated by using the retail pricing plans assigned. This works the same as for non-wholesale end-customers.

Usage Details			
BASIC		RATING	
Service Number	63	Date	11/01/2017 9:36 PM
Usage Type: Local			
Charge	0.03	Pricing Plan	Corp Dom Calling
Chargeable Units	6	Rate Period	Evening
Charged Units	60	Rate Plan Detail ID	297367
Pre-Discout Charge	0.03	Surcharge	0
Pre-Discout Charged Units	60	Rating Flags	6
Unit Type	Seconds	Regional	No
Unit Sub-Type	Seconds	Cost	.025

Figure 3 Rate Usage Record Displayed in Customer Care

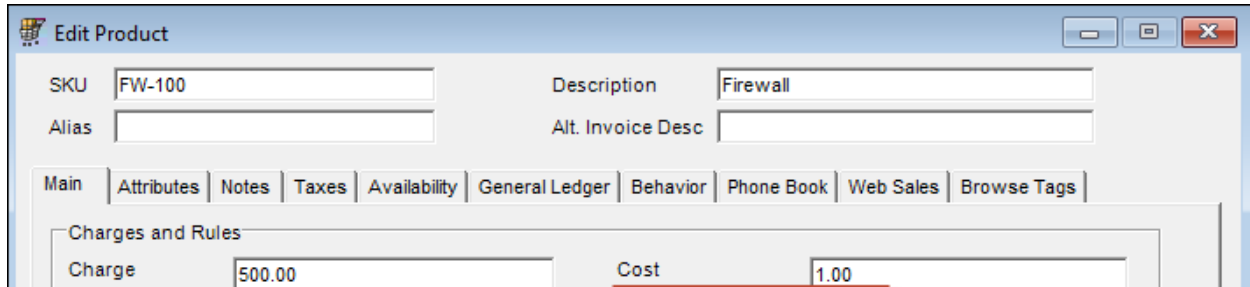
6.4 TRACKING WHOLESALE FEATURES

6.4.1 WHOLESALE FEATURES OVERVIEW



6.4.2 COST

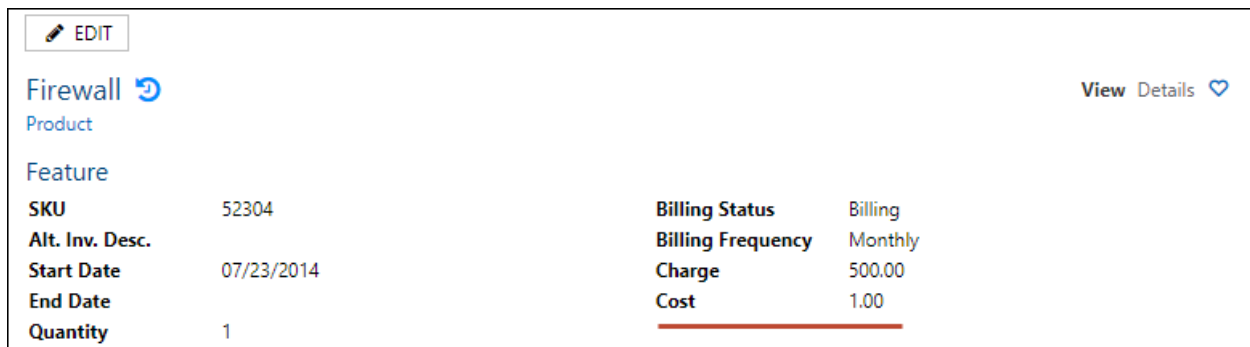
Cost for a Feature is configured in the Product Catalog by setting the value in the Cost field.



SKU	FW-100	Description	Firewall
Alias		Alt. Invoice Desc	
<div> Main Attributes Notes Taxes Availability General Ledger Behavior Phone Book Web Sales Browse Tags </div>			
Charges and Rules			
Charge	500.00	Cost	1.00

Figure 4 Editing a Feature in Product Catalog

Assigned instances of this Feature will display the associated Cost value for users who have the Show Cost permission assigned in Customer Care.



EDIT

Firewall
Product

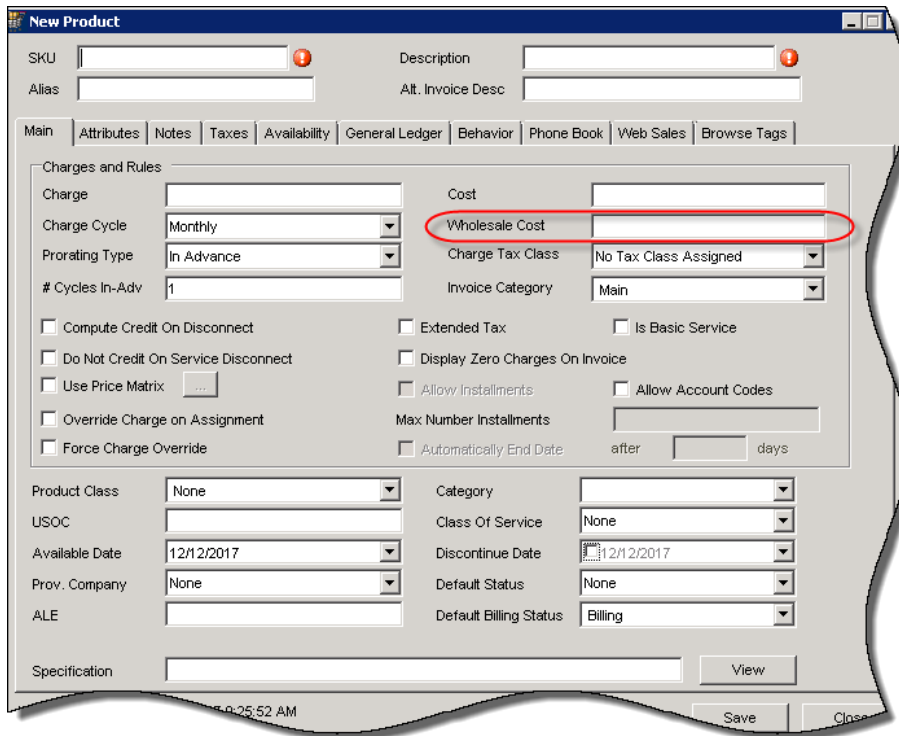
View Details

Feature	
SKU	52304
Alt. Inv. Desc.	
Start Date	07/23/2014
End Date	
Quantity	1
Billing Status	Billing
Billing Frequency	Monthly
Charge	500.00
Cost	1.00

Figure 5 View Feature Details in Customer Care

6.4.3 WHOLESALE COST

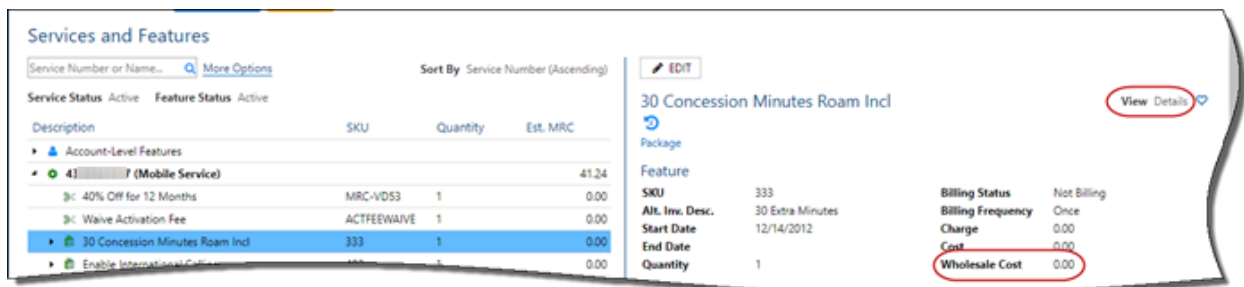
Wholesale Cost for a Feature is configured in the Product Catalog by setting the value in the Wholesale Cost field.



The screenshot shows the 'New Product' form with various fields for product configuration. The 'Wholesale Cost' field is highlighted with a red circle. Below is a summary of the visible fields and their values:

Field	Value
SKU	
Description	
Alias	
Alt. Invoice Desc	
Charge Cycle	Monthly
Prorating Type	In Advance
# Cycles In-Adv	1
Charge	
Cost	
Wholesale Cost	
Charge Tax Class	No Tax Class Assigned
Invoice Category	Main
Product Class	None
USOC	
Available Date	12/12/2017
Prov. Company	None
ALE	
Category	
Class Of Service	None
Discontinue Date	12/12/2017
Default Status	None
Default Billing Status	Billing

Assigned instances of this Feature will display the associated Wholesale Cost value for users who have the Show Cost permission assigned in Customer Care.



The screenshot shows the 'Services and Features' page with a table of services and features. The 'Wholesale Cost' field for the '30 Concession Minutes Room Incl' feature is highlighted with a red circle. Below is a summary of the visible data:

Service Number or Name	Service Status	Feature Status	Description	SKU	Quantity	Est. MRC
41	Active	Active	7 (Mobile Service)			41.24
			40% Off for 12 Months	MRC-VD53	1	0.00
			Waive Activation Fee	ACTFEEWAIVE	1	0.00
			30 Concession Minutes Room Incl	333	1	0.00
			Enable International Calling			0.00

Feature Details for '30 Concession Minutes Room Incl':

Field	Value
SKU	333
Alt. Inv. Desc.	30 Extra Minutes
Start Date	12/14/2012
End Date	
Quantity	1
Billing Status	Not Billing
Billing Frequency	Once
Charge	0.00
Cost	0.00
Wholesale Cost	0.00

6.4.4 CHARGE

In Wholesale Billing, the Charge for Features are calculated the same as for non-wholesale customers, using the configured Feature charge.

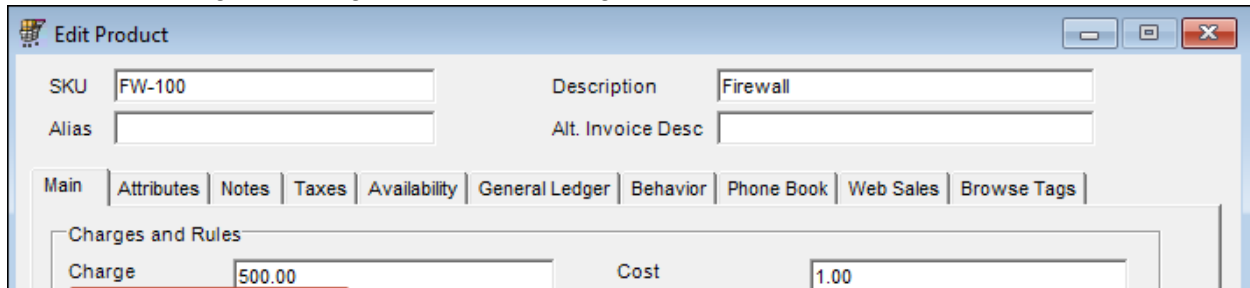


Figure 6 Editing a Features in Product Catalog

Assigned instances of this Feature will display the associated Charge value.

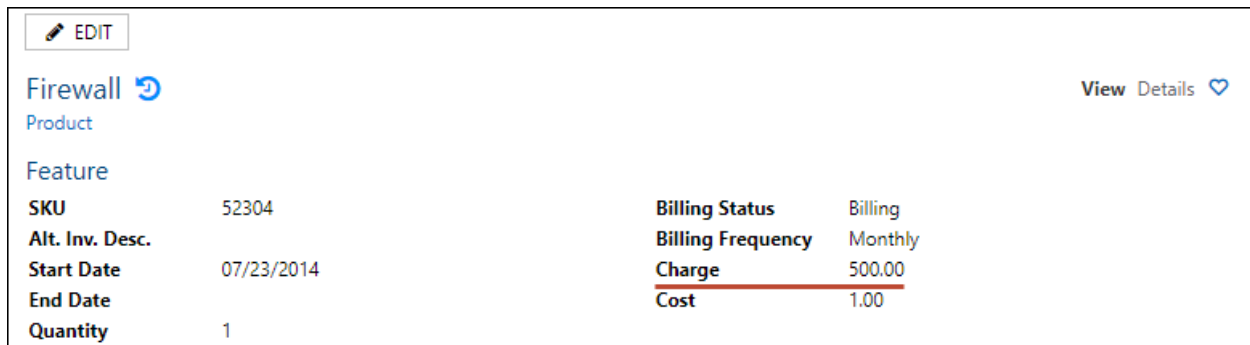


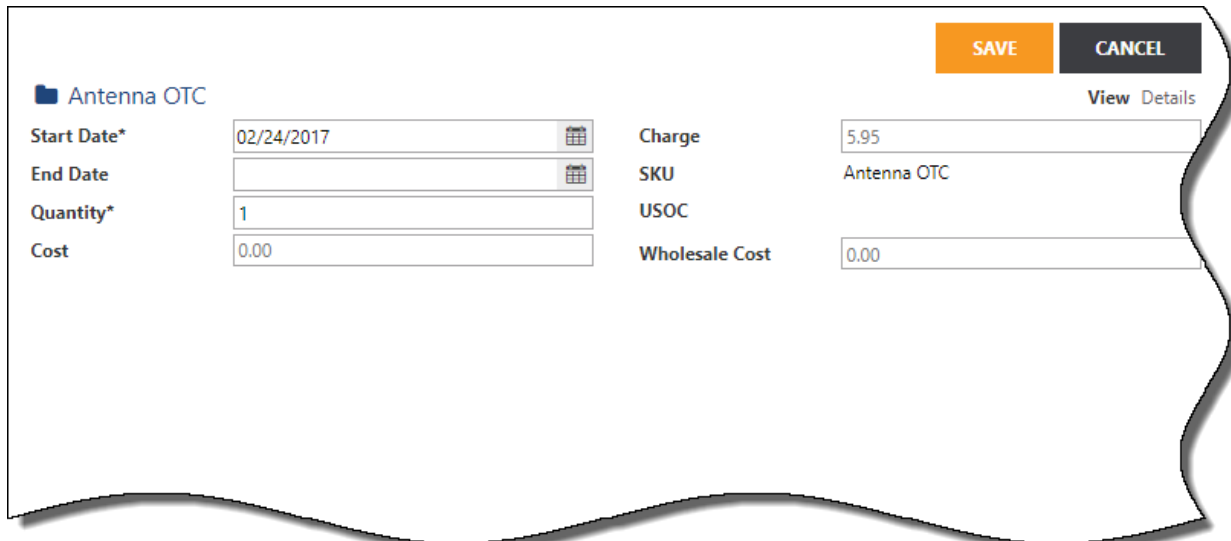
Figure 7 Viewing Feature Details in Customer Care

6.4.5 OVERRIDING COST, WHOLESALE COST AND CHARGE

CostGuard lets you override the configured default for a Feature's Cost, Wholesale Cost or Charge on an individual basis. This can either be done during an Order or by editing the Feature on the account.

6.4.6 OVERRIDING DURING AN ORDER

Users require the *Orders - Override Cost* permission to set the Cost or the Wholesale Cost for an individual instance of a Feature during an order. With this permission assigned users will see the default, and be able to supply their own value and save.



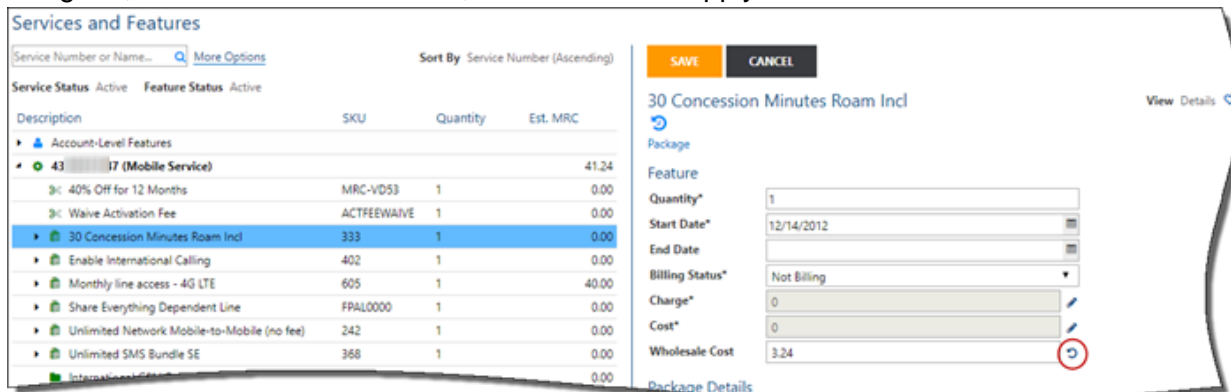
Antenna OTC View Details

Start Date*	02/24/2017	Charge	5.95
End Date		SKU	Antenna OTC
Quantity*	1	USOC	
Cost	0.00	Wholesale Cost	0.00

SAVE **CANCEL**

6.4.7 OVERRIDING IN CUSTOMER CARE

Users require the *Customer Care - Override Cost* permission to edit the Cost or the Wholesale Cost for an individual instance of a Feature assigned to an account. With this permission assigned, users will see the default, and be able to supply their own value and save.



Services and Features

Service Number or Name... [More Options](#) Sort By: Service Number (Ascending)

Service Status: Active Feature Status: Active

Description	SKU	Quantity	Est. MRC
Account-Level Features			
43 17 (Mobile Service)			41.24
30 40% Off for 12 Months	MRC-VD53	1	0.00
30 Waive Activation Fee	ACTFEEWAIVE	1	0.00
30 30 Concession Minutes Roam Incl	333	1	0.00
Enable International Calling	402	1	0.00
Monthly line access - 4G LTE	605	1	40.00
Share Everything Dependent Line	FPAL0000	1	0.00
Unlimited Network Mobile-to-Mobile (no fee)	242	1	0.00
Unlimited SMS Bundle SE	368	1	0.00

30 Concession Minutes Roam Incl View Details

Package

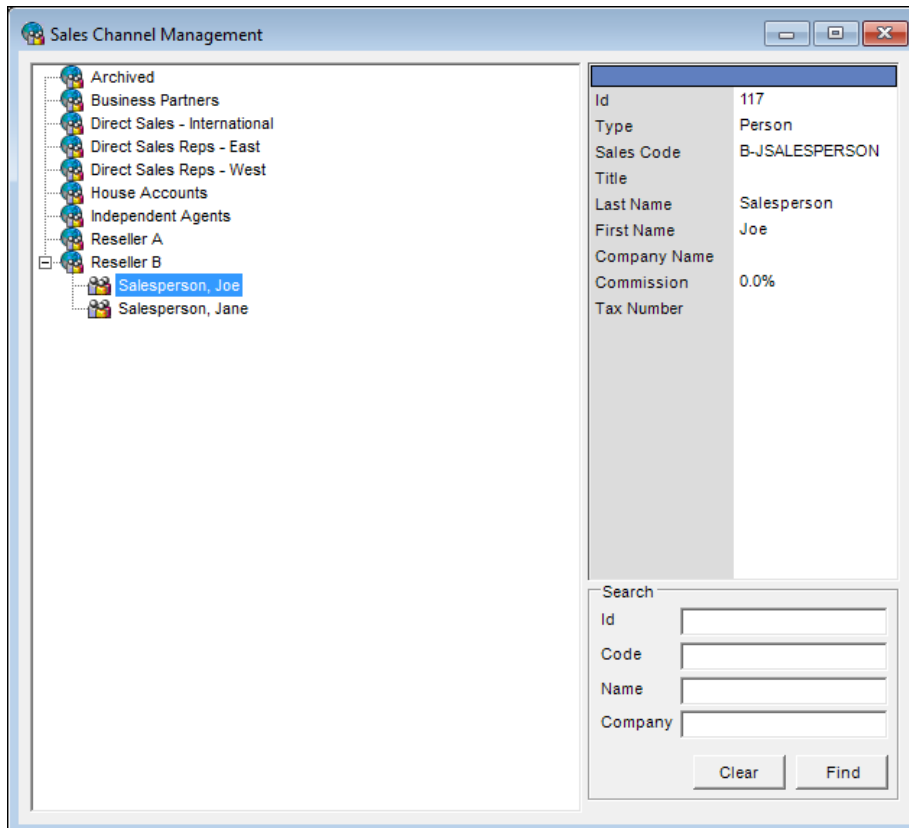
Feature

Quantity*	1
Start Date*	12/14/2012
End Date	
Billing Status*	Not Billing
Charge*	0
Cost*	0
Wholesale Cost	3.24

Package Details

6.5 TRACKING RESELLERS

Customer accounts can be associated to a reseller by using the Sales Channel property on the account. Sales Channels are a hierarchical grouping of sales organizations and individuals that are responsible for selling your services. Creating Sales Channels that represent your different resellers and their sales reps and then assigning them to accounts allows you to track your margins as well as the revenues owed.



Sales Channel Management

- Archived
- Business Partners
- Direct Sales - International
- Direct Sales Reps - East
- Direct Sales Reps - West
- House Accounts
- Independent Agents
- Reseller A
 - Salesperson, Joe
 - Salesperson, Jane

Details for Salesperson, Joe:

Id	117
Type	Person
Sales Code	B-JSALESPERSON
Title	
Last Name	Salesperson
First Name	Joe
Company Name	
Commission	0.0%
Tax Number	

Search:

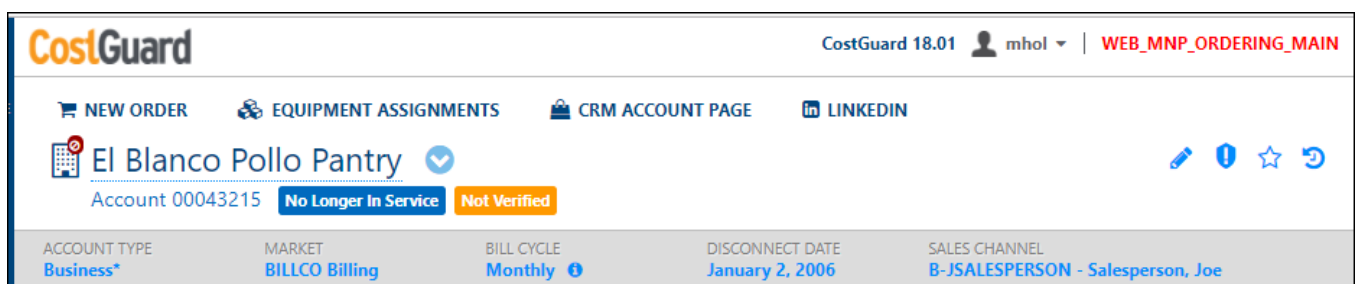
Id:

Code:

Name:

Company:

Clear Find



CostGuard CostGuard 18.01 mhol WEB_MNP_ORDERING_MAIN

NEW ORDER EQUIPMENT ASSIGNMENTS CRM ACCOUNT PAGE LINKEDIN

El Blanco Pollo Pantry Account 00043215 **No Longer In Service** **Not Verified**

ACCOUNT TYPE Business*	MARKET BILLCO Billing	BILL CYCLE Monthly	DISCONNECT DATE January 2, 2006	SALES CHANNEL B-JSALESPERSON - Salesperson, Joe
---------------------------	--------------------------	-----------------------	------------------------------------	--

6.6 COSTGUARD 18.1 CHANGES TO SUPPORT WHOLESALE BILLING

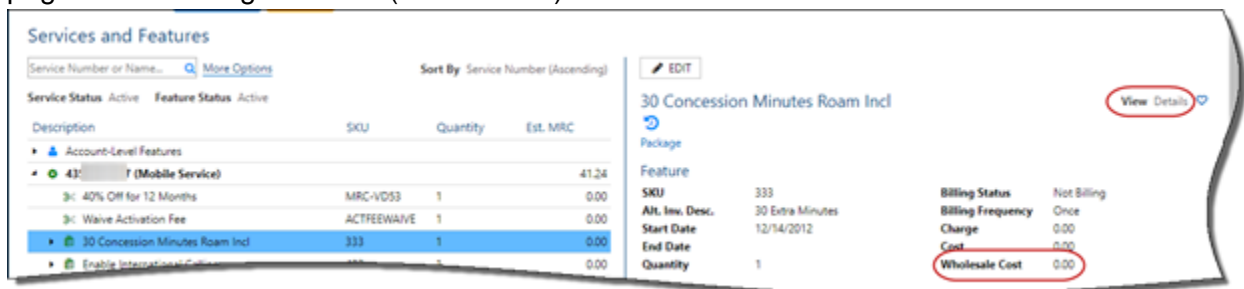
The Wholesale Billing solution is a combination of existing CostGuard functionality and features added in CostGuard 18.1. The following sections describe the specific changes made to CostGuard in the 18.1 release for this functionality.

6.6.1 CUSTOMER CARE

Customer Care has been enhanced to let you view and edit the wholesale cost on a feature (all product types except Discounts and Contracts). Additionally, Customer Care has been enhanced so that wholesale pricing plans can be distinguished from standard pricing plans

6.6.2 VIEW WHOLESALE COST

On the Services and Features page, the wholesale cost will be displayed on the right side of the page when viewing a feature (Details view).

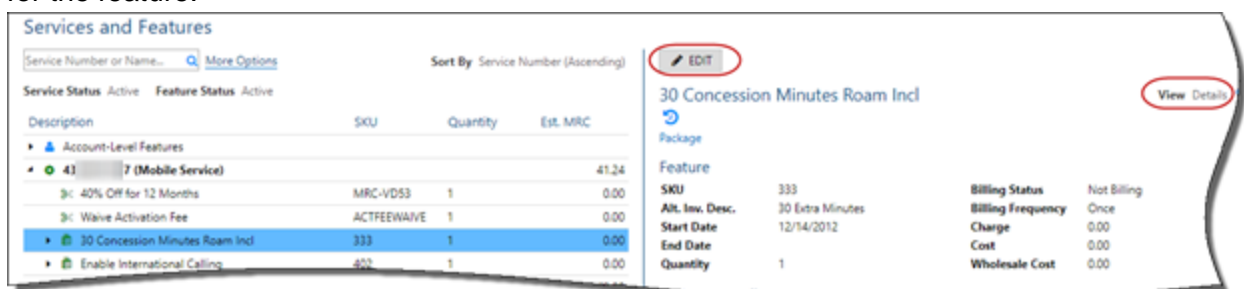


Permission

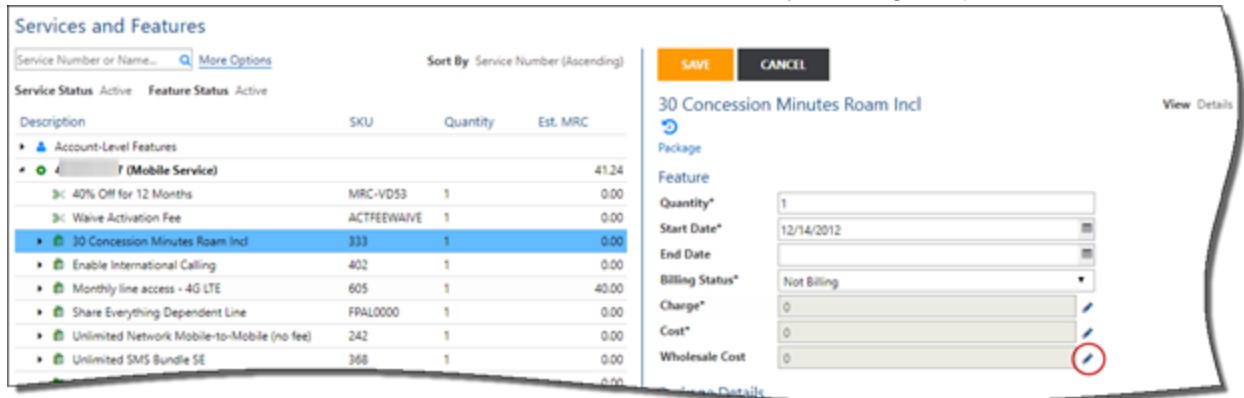
Display of the wholesale cost is controlled by the *Show Cost* permission in Customer Care. This is an existing permission that also controls whether the *Cost* field is displayed on a feature. The permission is included in the *Customer Care Admin* role

6.6.3 EDIT WHOLESALE COST

The ability to override the wholesale cost on a feature has been added to the Services and Features page. Users with permissions to edit a feature and override cost, will have a pencil icon next to the Wholesale Cost field when editing a feature. Click **EDIT** from the Details view for the feature:



Once in *Edit* mode, the Wholesale Cost can be overridden by clicking the pencil:



Description	SKU	Quantity	Est. MRC
Account-Level Features			
4 (Mobile Service)			41.24
40% Off for 12 Months	MRC-VD53	1	0.00
Waive Activation Fee	ACTFEEWAIVE	1	0.00
30 Concession Minutes Roam Incl	333	1	0.00
Enable International Calling	402	1	0.00
Monthly line access - 4G LTE	605	1	40.00
Share Everything Dependent Line	FRAL0000	1	0.00
Unlimited Network Mobile-to-Mobile (no fee)	242	1	0.00
Unlimited SMS Bundle SE	368	1	0.00

30 Concession Minutes Roam Incl

Package

Feature

Quantity* 1

Start Date* 12/14/2012

End Date*

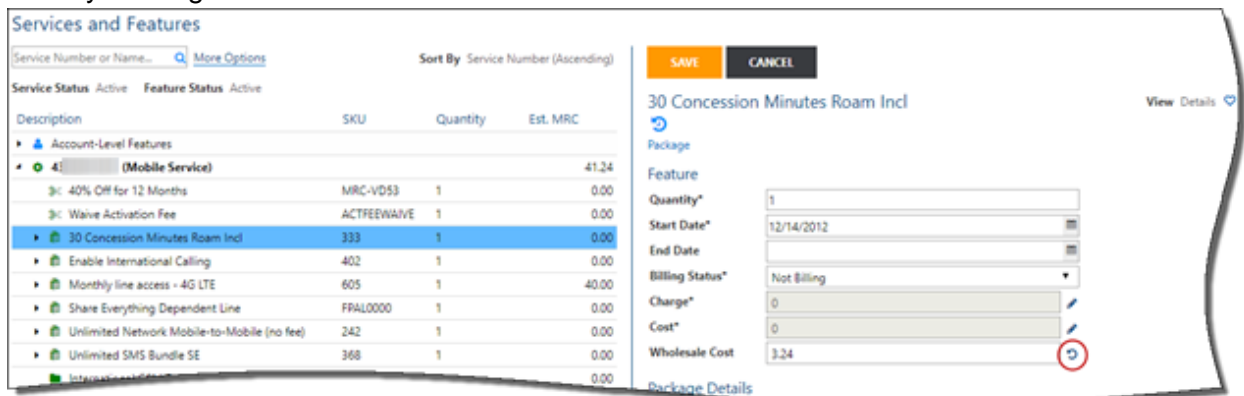
Billing Status* Not Billing

Charge* 0

Cost* 0

Wholesale Cost 0

If the Wholesale Cost has been overridden, it can be reverted to the Product Catalog wholesale cost by clicking the revert icon:



Description	SKU	Quantity	Est. MRC
Account-Level Features			
4 (Mobile Service)			41.24
40% Off for 12 Months	MRC-VD53	1	0.00
Waive Activation Fee	ACTFEEWAIVE	1	0.00
30 Concession Minutes Roam Incl	333	1	0.00
Enable International Calling	402	1	0.00
Monthly line access - 4G LTE	605	1	40.00
Share Everything Dependent Line	FRAL0000	1	0.00
Unlimited Network Mobile-to-Mobile (no fee)	242	1	0.00
Unlimited SMS Bundle SE	368	1	0.00

30 Concession Minutes Roam Incl

Package

Feature

Quantity* 1

Start Date* 12/14/2012

End Date*

Billing Status* Not Billing

Charge* 0

Cost* 0

Wholesale Cost 3.24

Permission

The ability to edit wholesale cost is controlled by the *Override Cost* permission in Customer Care. This is an existing permission that also controls whether the *Cost* field is editable.

The permission is included in the *Customer Care Admin* role

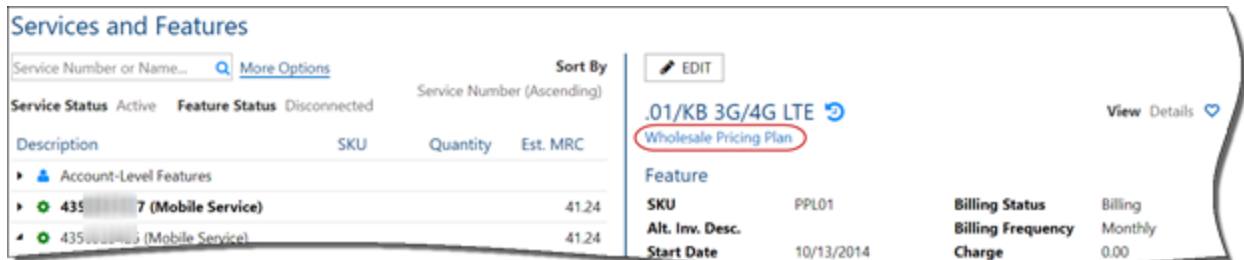
6.6.4 WHOLESALE PRICING PLAN

Customer Care has been enhanced to distinguish a wholesale pricing plan from a standard pricing plan (when the product type is *program* and the product sub-type id is *1/wholesale*).

Wholesale pricing plans will be displayed with a unique icon when viewing the features on the Services and Features page and the Service Detail page:

4G LTE Bundle - Unlimited	356	1	29.99
01/KB 3G/4G LTE	PPL01	1	0.00
Unlimited 3G/4G LTE Data	UNL-DL	1	0.00
Block International Data...	BLOCKI...	1	0.00

The feature details on the right side of the Services and Features page has been updated to display *Wholesale Pricing Plan*.

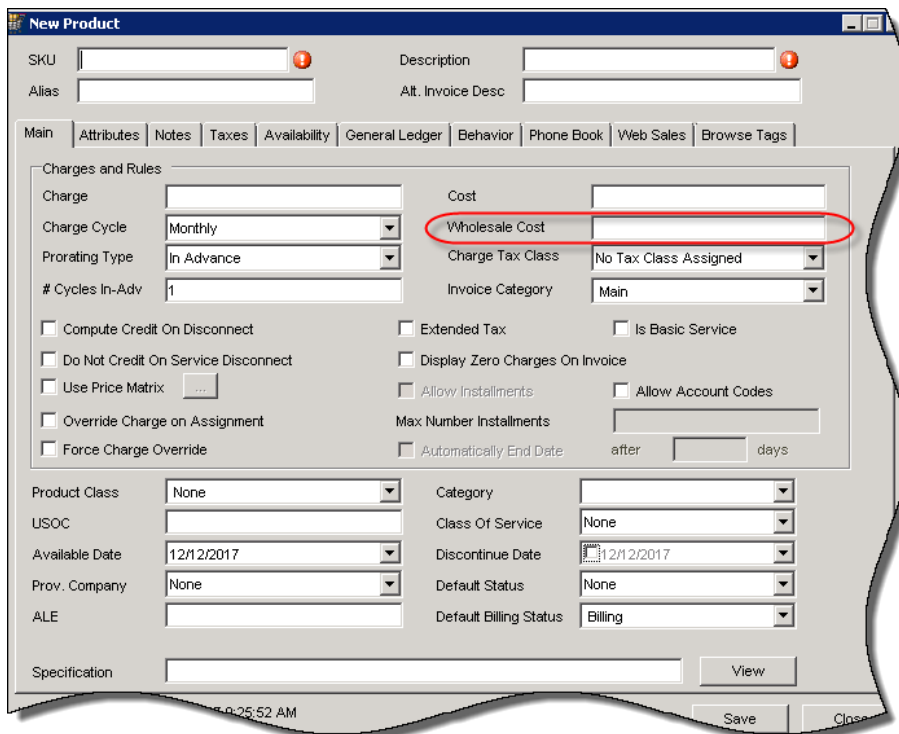


The screenshot shows the 'Services and Features' interface. On the left, a table lists services with columns for Description, SKU, Quantity, and Est. MRC. Two services are listed: '435... 7 (Mobile Service)' and '435... (Mobile Service)', both with an estimated MRC of 41.24. On the right, the details for the selected feature '.01/KB 3G/4G LTE' are shown. The feature name is circled in red and labeled 'Wholesale Pricing Plan'. Other details include SKU PPL01, Billing Status Billing, Billing Frequency Monthly, Start Date 10/13/2014, and Charge 0.00.

6.6.5 PRODUCT CATALOG

The following Product Catalog forms were updated with Wholesale Cost:

- Product
- Package
- Pricing Plans



The screenshot shows the 'New Product' form. The 'Charges and Rules' section is expanded, showing fields for Charge, Charge Cycle (Monthly), Prorating Type (In Advance), and # Cycles In-Adv (1). The 'Cost' field is circled in red and labeled 'Wholesale Cost'. Other fields include Charge Tax Class (No Tax Class Assigned), Invoice Category (Main), and various checkboxes for billing and service options. The bottom section contains fields for Product Class, USOC, Available Date, Prov. Company, ALE, Category, Class Of Service, Discontinue Date, Default Status, and Default Billing Status.

New Package

SKU Description
Alias Alt. Invoice Desc

Main | Taxes | Notes | Attributes | Availability | General Ledger | Behavior | Phone Book | Web Sales | Browse Tags

Charge and Rules

☐ One Price Package

Charge Cost
Charge Cycle Monthly Wholesale Cost
Prorating Type In Advance Charge Tax Class No Tax Class Assigned
Cycles In-Adv 1 Invoice Category Main

☐ Compute Credit On Disconnect ☐ General Ledger at Component Level ☐ Is Basic Service
☐ Do Not Credit On Service Disconnect ☐ Display Zero Charges on Invoice
☐ Use Price Matrix ☐ Allow Installments
☐ Override Charge on Assignment Max # Installments
☐ Force Charge Override ☐ Automatically End Date after days

Product Class None Class Of Service None
USOC Discontinue Date 12/12/2017
Available Date 12/12/2017 Default Status None
Prov. Company None Default Billing Status Billing
Category
Specification View

9:20:01 AM Save Close

New Pricing Plan

SKU Description
Alias Alt. Invoice Desc

Main | Taxes | Notes | Attributes | Availability | General Ledger | Behavior | Browse Tags

Charges and Rules

Charge Cost
Charge Cycle Monthly Wholesale Cost
Prorating Type In Advance Charge Tax Class No Tax Class Assigned
Cycles In-Adv 1 Invoice Category Main

☐ Use Price Matrix ☐ Is Basic Service
☐ Override Charge on Assignment ☐ Display Zero Charges on Invoice
☐ Force Charge Override ☐ Compute Credit On Disconnect
☐ Do Not Credit On Service Disconnect

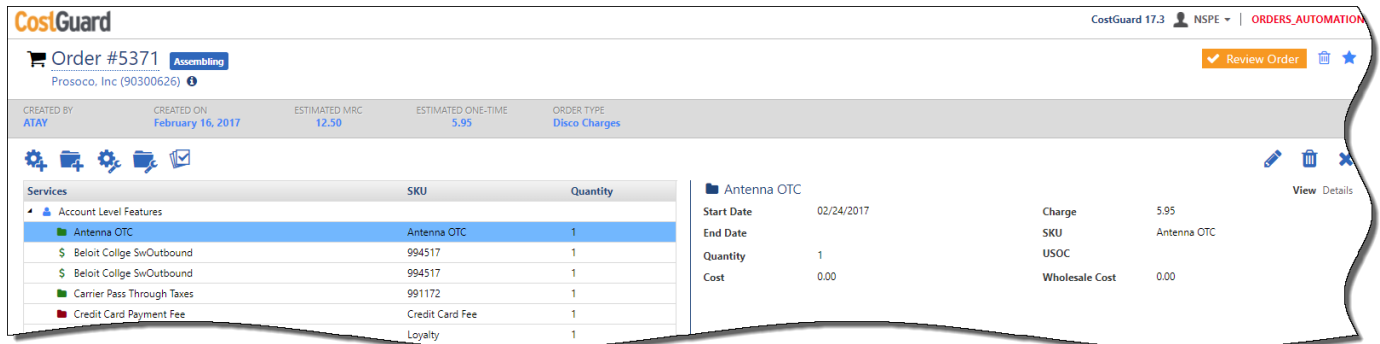
Product Class None Class Of Service None
USOC Discontinue Date 12/12/2017
Available Date 12/12/2017 Default Status None
Prov. Company None Commission
Country Group Default Default Billing Status Billing
Call Plan None Category Default
Prod. Category
Specification View

9:23:01 AM Save Close

6.6.6 ORDERS

In the Order Details page, when you select the pencil icon to edit the following feature types, you can view or override the Wholesale Cost and Cost fields:

- Product
- Package
- Pricing Plan



CostGuard CostGuard 17.3 NSPE | ORDERS_AUTOMATION

Order #5371 **Assembling** Review Order

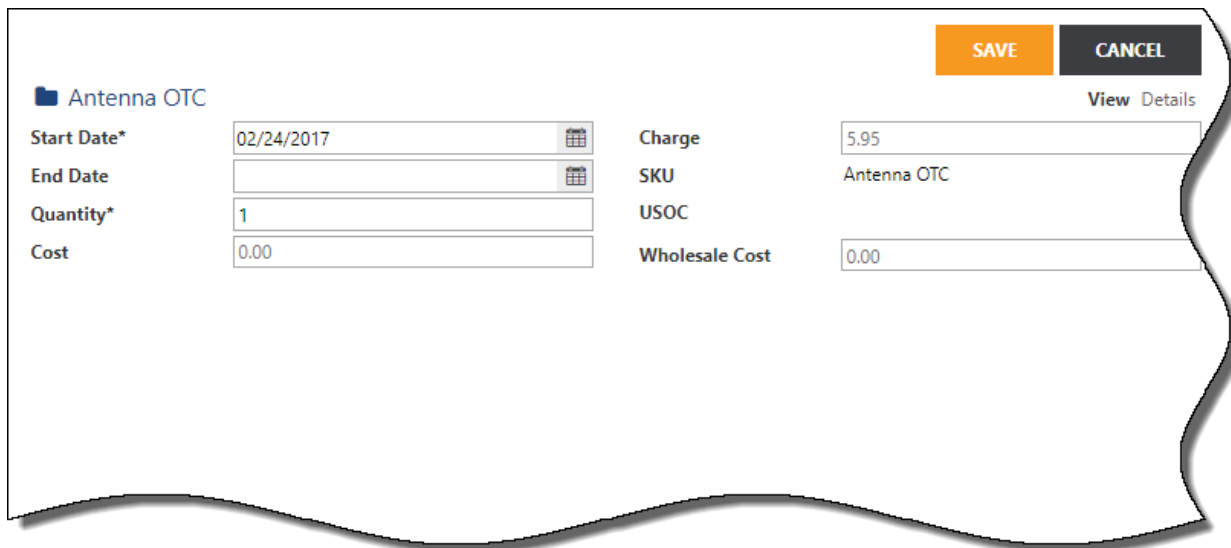
Prosoco, Inc (90300626)

CREATED BY: ATAY | CREATED ON: February 16, 2017 | ESTIMATED MRC: 12.50 | ESTIMATED ONE-TIME: 5.95 | ORDER TYPE: Disco Charges

Services	SKU	Quantity
Account Level Features		
Antenna OTC	Antenna OTC	1
\$ Beloit Collge SwOutbound	994517	1
\$ Beloit Collge SwOutbound	994517	1
Carrier Pass Through Taxes	991172	1
Credit Card Payment Fee	Credit Card Fee	1
	Loyalty	1

Antenna OTC View Details

Start Date	02/24/2017	Charge	5.95
End Date		SKU	Antenna OTC
Quantity	1	USOC	
Cost	0.00	Wholesale Cost	0.00



Antenna OTC View Details

SAVE **CANCEL**

Start Date*	02/24/2017	Charge	5.95
End Date		SKU	Antenna OTC
Quantity*	1	USOC	
Cost	0.00	Wholesale Cost	0.00

SAVE CANCEL

test_package View Detail

Start Date*	03/07/2017	Charge	12.50
End Date		SKU	test_package
Quantity*	1	USOC	testUSOC
Cost	0.00	Wholesale Cost	0.00

SAVE CANCEL

\$ Beloit Collge SwOutbound View Detail

Start Date*	03/09/2017	Charge	0.00
End Date		SKU	994517
Quantity*	1	USOC	REMOVE
Cost	0.00	Wholesale Cost	0.00

The ability to view or change the Wholesale Cost on an Order are controlled by the existing *View Cost* and *Override Cost* permissions in the Orders module.

7 Retail Installment Plan Start Date

The Installment Plan (billing product) Start Date now represents when the corresponding equipment was fulfilled (shipped or picked up) rather than when it was purchased. Beginning billing of installments when the corresponding equipment is fulfilled prevents scenarios where subscribers are billed for equipment on back order or other fulfillment challenges/delays that can occur post-purchase.

Prior to this change, the completion/finalization of the Sales Request would include the creation (and subsequent add) of the billing installment plan. This function has now been moved to the creation of a Fulfillment Sale transaction.

With this change, you will not see the installment plan (billing product) on the order associated to the Sales Request. The assigned Start Date of the Installment Plan reflects when the corresponding equipment had been fulfilled. You can see the assigned Start Date by viewing the Installment Plans (Account-> Installment Plans) or by viewing the installment plan details of the assigned billing product.

Note: These changes have no impact on the performed transactions or the current user experience.

8 TransArmor Token – Tempus Gateway

The TransArmor token may be used to help solve a CostGuard register reconciliation issue related to E-Pay credit card transactions, where the Tempus total for the E-Pay account does not match the CostGuard total. Note that the TransArmor token (when enabled) is only used on E-Pay credit card transactions, and is not used on Smart Node (one-time) transactions.

Use of the TransArmor token is controlled by several new settings. One is located in Admin Console Business Rules and must be set by an authorized IDI associate. Also all applicable registers must have their Register Policy configured to support this functionality. This setting is available to authorized CostGuard users.

When **Use TransArmor Token** is set to **Yes** as described in *Setup*, the TransArmor token will be passed (if available) to Tempus. **NOTE:** Smart Node (one-time transactions) are unaffected by TransArmor.

The following scenarios define how the TransArmor token may be applied:

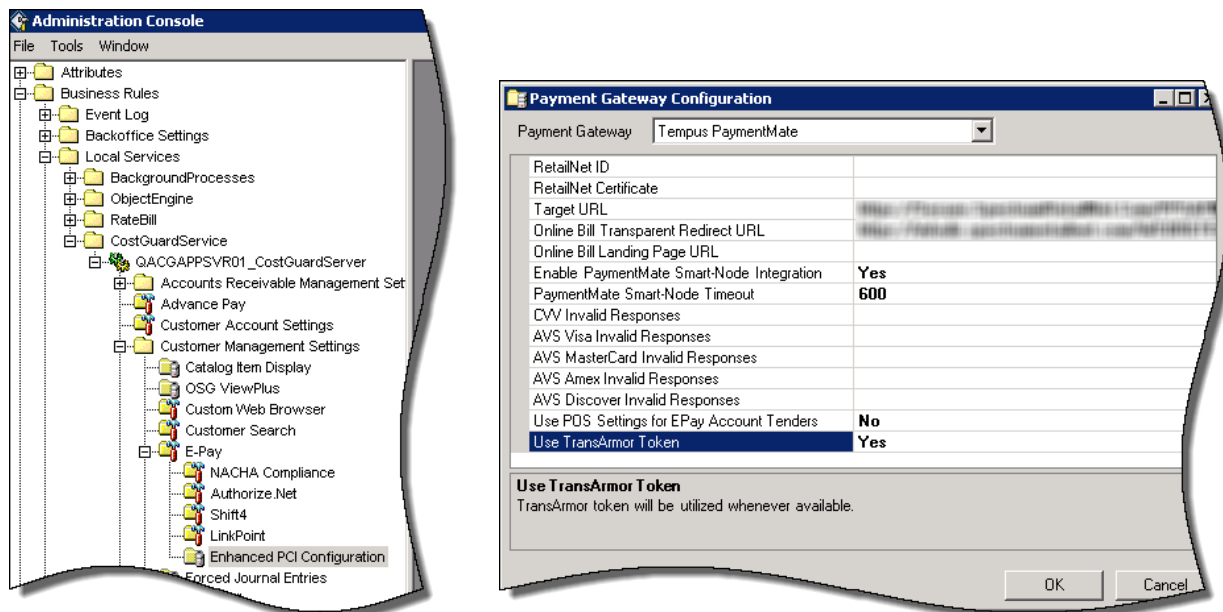
- **Customer Management E-Pay - Create New Credit Card E-Pay Account**
When you create a new credit card account in Customer Management and Tempus provides a TransArmor token, that token will be associated to the E-Pay account in CostGuard.
- **Customer Management E-Pay - Edit Credit Card E-Pay Account**
When you edit an existing credit card account in Customer Management and Tempus provides a TransArmor token, that token will be associated to the E-Pay account in CostGuard.
- **Customer Management E-Pay - Make Onetime Charge**
When you perform a Make Onetime Charge on a credit card account, the TransArmor token (if available) will be passed to Tempus.
- **Customer Management E-Pay - Make Onetime Credit**
When you perform a Make Onetime Credit on a credit card account, the TransArmor token (if available) will be passed to Tempus.
- **POS Save Account Credit Card Transaction (non Smart-Node)**
When you choose to save a credit card account in POS, CostGuard will associate the TransArmor token with the saved account if passed in from Tempus.

8.1 SETUP

8.1.1 USE TRANSARMOR TOKEN SETTING – ADMIN CONSOLE

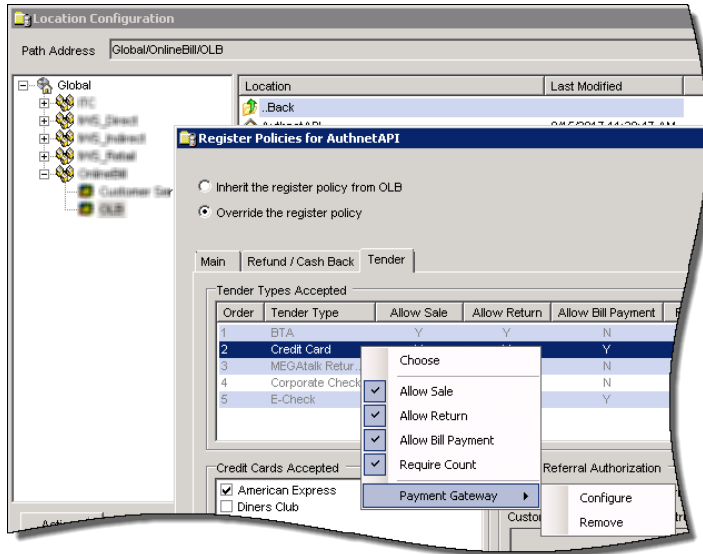
To use the TransArmor token with Customer Management EPAY, the *Use TransArmor Token* setting must be set to **Yes** in the Admin console. This setting is not available to customers and must be set by an authorized IDI associate.

In Admin, under Business Rules > Local Services, open the Enhanced PCI Configuration section and set *Use TransArmor Token* to **Yes**.



8.2 USE TRANSARMOR TOKEN – REGISTER POLICY SETUP

To use the TransArmor token with POS transactions, the *Use TransArmor Token* setting must also be set to **Yes** on all applicable registers. Navigate to **Applications > POS Back Office > Locations**, then drill down to the desired location and right click to view the register policy. Next, on the tender tab of the register policy, right click on credit card and select **Payment Gateway > Configure**.



Set the *Use TransArmor Token* to **Yes**.

