

Core Release Bulletin

CostGuard Solution 18.5 Release

May 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 included in this release.

Functional Area	AR/FR	Description
Customer Care	FR 2856	Continued Disputes Development (introduced under FR 2840): - Ability to add an adjustment, reversal and reversal fee Add Past Due Balance to Balance Summary
	FR 2864	OmniSearch Enhancements to improve performance
Orders	FR 2851	Swap Equipment on Modify Service
	FR 2848	Add Billing Installment Plans to Orders
	FR 2857	Miscellaneous Enhancements: <ul style="list-style-type: none"> In the Manage menu, the Configured Workflows option is now labeled Order Scenarios. This name provides a clearer description of the configurable actions being performed. A new Order Submitted trigger was added to Workflow Triggers to execute an action when an order is submitted.
Tickets	AR 8048	Add/manage Follow-ups and reminders
OnlineBill	FR 2881	<ul style="list-style-type: none"> Display Accepted Credit Cards - Accepted Credit Cards defined in the POS Register Policy for the OLB location will display on the Make Payment Page Allow Logon Permission - The OLB Admin Role now includes the Allow Logon permission and is consistent with other Admin roles for other IDI apps
CostGuard Reports	FR 2825	Wholesale Billing Reports – Four new grid reports to support the Wholesale Billing Enhancements: <ul style="list-style-type: none"> Wholesaler Product and Usage Summary Wholesaler Product and Usage Detail Reseller Product and Usage Summary Reseller Product and Usage Detail
	AR 8029	Receipt-style report for selected payment on the CostGuard Client Balances tab or Payment Search results.
CostGuard Client - Collections	AR 8073	Past Due Balance option on Treatment Notification Template Data Source
Product Catalog	FR 2881	Accommodate large usernames - Previously when a username was longer than expected the <i>Last Modified</i> details were pushed to the next line and were not clearly shown. Applicable Product Catalog screens have been enhanced to accommodate large usernames.
POS Inventory	AR 8093	Added retail product's description to POS Inventory Transfer and Receive transaction screens (specifically, those for performing an Add, Edit or View). This adds more clarity to each displayed Product SKU.
XML – Usage Detail	AR 8007	Mask phone numbers output in XML based on market configuration. Some European countries require that documentation provided to end subscribers not show the last three digits of the called number in usage detail.
Account Posting	FR 2872	Performance improvements
Audit Log	N/A	New Features & Enhancements: <ul style="list-style-type: none"> Monitoring and logging enhancements




Communications	N/A	<p>New Features & Enhancements:</p> <ul style="list-style-type: none"> • When object links are not included in the email address, link the message to the same object as previous messages in the thread. • Set From alias to sanitized version of the From email address when not otherwise presented. This prevents environment and linking information from displaying in the user's email client. • Added a new property to the <i>Create</i> and <i>Modified Messages</i> triggers. The new property provides the ability to configure filters for just the local part of email using the To field. <p>Resolved Known Issues:</p> <ul style="list-style-type: none"> • Updated the <i>Send Message from Template</i> action so that the Data field process the new data type of JSON Object correctly. • Removed any duplicate email addresses from distribution list so that messages would send properly. This solution contains a precedent order for removing duplicate addresses. <ul style="list-style-type: none"> ▪ If an address is duplicated between To and Cc, then remove from Cc and keep the address in the To field. ▪ If an address is duplicated between Cc and Bcc, then remove from Bcc and keep the address in the Cc field.
Payment Gateway	N/A	<p>New Features & Enhancements:</p> <ul style="list-style-type: none"> • FR 2864 – Added <i>Application Insights</i> for monitoring the PGA • FR 2870 – Updated PGA API to support UpdatePaymentAccount and Void • Supports future FR 2871 for OnlineBill (OLB), edit e-Pay account and exception handling using Void. All interactions between OLB and new Authorize.Net API will then be via PGA • Add new Void request field Provider Transaction Status to PGA Admin > Detail > Additional Information <p>Resolved Known Issues:</p> <ul style="list-style-type: none"> • FR 2870 – Updated PGA API to support UpdatePaymentAccount and Void <ul style="list-style-type: none"> ▪ Fix to properly encrypt account tokens in Cosmos DB for one-time transactions like Sale and UpdatePaymentAccount
Security	N/A	<p>New Features & Enhancements:</p> <ul style="list-style-type: none"> • Monitoring and logging enhancements <p>Resolved Known Issues:</p> <ul style="list-style-type: none"> • Fixed issue where the get user for application was slow, causing Workflow issues when loading pages (PR 82596)
Workflow	N/A	<p>New Features & Enhancements:</p> <ul style="list-style-type: none"> • Added <i>Allow Search</i> permission that lets users search for Workflow Instances and Tasks. For backwards compatibility, this permission has been added to all core Workflow Roles and any custom roles that were previously created. • Updated the <i>Create Workflow</i> action to include a parameter for the Workflow's <i>Instance GUID</i>. <p>Resolved Known Issues:</p> <ul style="list-style-type: none"> • Added a new data type of JSON Object for more robust parsing of the Data field on <i>Create Workflow</i> and <i>Send Message from Template</i> actions. • Updated display for extended data when Smart Data replacement was NULL. System was previously displaying 'NaN'. • Fixed RootWorkflowInstanceID associated to a WorkItemInstance not being set to the correct value.

2 Customer Care Web Module

2.1 MANAGING DISPUTES

CostGuard version 18.4 provided the ability to view, open, edit and close Disputes for selected invoice items and usage charges. This release (18.5) provides the ability to add an adjustment, reversal and reversal fee on a Dispute.

A color-coded dollar sign icon is available for open Disputes on the Dispute Details view:

-  Green + = Add Adjustment. This is available if the Dispute has not had an adjustment applied
-  Yellow + = Add Reversal. This is available if the Dispute currently has an adjustment that has not yet been reversed
-  Red + = Add Reversal Fee. This is available if the Dispute currently has a Reversal that has not yet had a fee applied

Note: Only one action is available at a time; and each of these actions is available only once per Dispute. These actions are not required. The Dispute can be closed at any time.

Disputes Include Closed Disputes

Invoice	Date	Amount	Service Number	Invoice Item
Invoice 11506166 Has 1 open dispute for 40.00	10/15/2016			
Invoice 11652165 Has 3 open disputes for 30.18	02/26/2018 4:21 PM	25.00	5-14	Monthly line access - 4G LTE
	03/01/2018 1:13 PM	1.19	5-14	Billed Usage
	04/17/2018 2:39 PM	3.99	5-14	International Long Distance Discount Plan
Invoice 11819166 Has 4 open disputes for 6.39	12/15/2016			

Dispute for 5-14 - Monthly line access - 4G LTE

DETAILS | JOURNALS | FOLLOW-UPS Last modified by idl_esul 2 months ago

Date	02/26/2018 4:21 PM	Description	Monthly line access - 4G LTE (1) - testing
Amount	25.00		
Resolution	Approved		
Close Date			

Resolution Actions

- ✓ Adjustment
 - ID: 2951891
 - Type: Concession Credit: Data
 - Amount: (40.00)
 - Date: February 26, 2018
 - Created by: idl_esul
- ✓ Reversal
 - ID: 2951897
 - Type: Concession Credit: Data
 - Amount: 40.00
 - Date: February 26, 2018
 - Created by: idl_esul

2.1.1 ADDING AN ADJUSTMENT

On the Disputes page, if the selected Dispute does not yet have an associated adjustment, the Add Adjustment icon (dollar sign with green +) will be available in the Details view.

Disputes Include Closed Disputes

Invoice	Has	Open Disputes For	Close Date
Invoice 11506166	Has 1 open dispute for	49.00	10/15/2016
Invoice 11652165	Has 3 open disputes for	30.18	11/15/2016
Invoice 11819166	Has 4 open disputes for	6.39	12/15/2016

Date	Amount	Service Number	Invoice Item
02/26/2018 4:21 PM	25.00	51-44	Monthly line access - 4G LTE
03/01/2018 1:13 PM	1.19	51-44	Billed Usage
04/17/2018 2:39 PM	3.99	51-44	International Long Distance Discount Plan

Dispute for 51-44 - International Long Distance Discount Plan

Date: 04/17/2018 2:39 PM Description: International Long Distance Discount Plan, 51-44

Amount: 3.99

Resolution:

Close Date:

Clicking this icon displays the Create Adjustment dialog. Amount, Adjustment Date and Type are required fields. The Amount cannot exceed the original amount. The Adjustment Types drop-down is pre-filter to have Credit Adjustment Types only. The Adjustment date defaults to today, and can be changed as needed.

Create Adjustment

Amount*

Adjustment Date*

Adjustment Type*

Reason

Description

Block Posting

Once an adjustment is created, the Disputes page will show the adjustment under Resolution Actions, and the icon will change to *add reversal* mode.

Dispute for 51-44 - International Long Distance Discount Plan

Date: 04/17/2018 2:39 PM Description: International Long Distance Discount Plan, 51-44

Amount: 3.99

Resolution:

Close Date:

Resolution Actions

✓ Adjustment

ID: 2951950

Type: Bill Credit

Amount: (3.99)

Date: April 18, 2018

Created by TFOR

2.1.2 REVERSING AN ADJUSTMENT

When an adjustment on a Dispute has not yet been reversed, you can reverse the adjustment as indicated by the dollar sign with a yellow +.

Clicking this icon displays the Create Adjustment dialog specifically for reversals. The reversal information is pre-populated with information from the adjustment that is being reversed. The amount, date and type are set to the original adjustment settings and cannot be changed. You may select a reversal reason as needed.

Create Adjustment

Amount* 3.99

Adjustment Date* 04/18/2018


Adjustment Type* Bill Credit

Reason

Description Reversal -

SAVE
CANCEL

Once a reversal is applied, the Disputes page will show the reversal under Resolution Actions, and the icon will change to *add reversal fee* mode.



Last modified by TFOR just now

DETAILS JOURNALS FOLLOW-UPS

Dispute for 5 [redacted] 14 - International Long Distance Discount Plan

Date	04/17/2018 2:39 PM	Description
Amount	3.99	International Long Distance Discount Plan, 5 [redacted] 14
Resolution		
Close Date		

Resolution Actions

- ✔ **Adjustment**

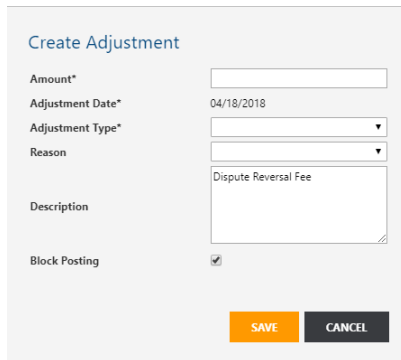
ID	2951950
Type	Bill Credit
Amount	(3.99)
Date	April 18, 2018
Created by TFOR	
- ✔ **Reversal**

ID	2951951
Type	Bill Credit
Amount	3.99
Date	April 18, 2018
Created by TFOR	

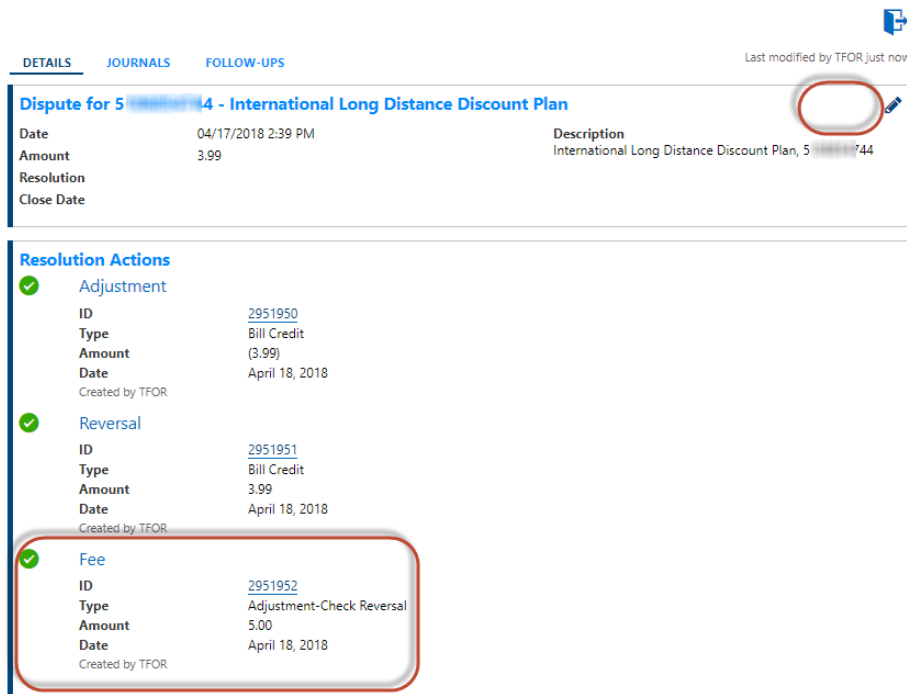
2.1.3 APPLYING A REVERSAL FEE

If you've created an adjustment reversal and not yet applied a fee, you can associate a fee to the reversal as indicated by the dollar sign with the red +.

Clicking this icon displays the Create Adjustment dialog specifically for reversal fees. Enter the Amount and select an Adjustment Type. **Note:** Adjustment types are pre-filtered to only have debit types. The description is pre-populated to Dispute Reversal Fee; however, it can be edited.



Once a reversal fee is applied, the Disputes page will show the fee under Resolution Actions, and the color-coded adjustment icon will no longer be available.



DETAILS JOURNALS FOLLOW-UPS Last modified by TFOR just now

Dispute for 5 [redacted] 4 - International Long Distance Discount Plan

Date	04/17/2018 2:39 PM	Description	International Long Distance Discount Plan, 5 [redacted] 44
Amount	3.99		
Resolution			
Close Date			

Resolution Actions

- ✓ Adjustment

ID: 2951950

Type: Bill Credit

Amount: (3.99)

Date: April 18, 2018

Created by TFOR
- ✓ Reversal

ID: 2951951

Type: Bill Credit

Amount: 3.99

Date: April 18, 2018

Created by TFOR
- ✓ Fee

ID: 2951952

Type: Adjustment-Check Reversal

Amount: 5.00

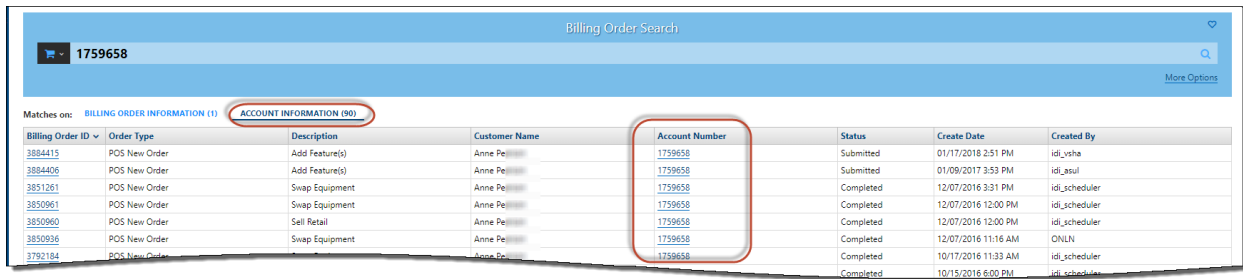
Date: April 18, 2018

Created by TFOR

2.2 OMNISEARCH ENHANCEMENTS

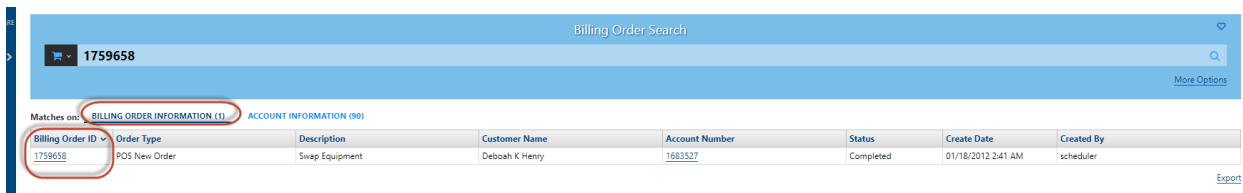
For some searches, where the value you enter has the potential match both account information and another type of information (Adjustment, Billing Order, Follow-up, Journal, Order, or Payment) the search results will be presented on two tabs.

Results for matches on account number or customer name are displayed on the Account Information tab.



Billing Order ID	Order Type	Description	Customer Name	Account Number	Status	Create Date	Created By
3884415	POS New Order	Add Feature(s)	Anne Pe...	1759658	Submitted	01/17/2018 2:51 PM	idi_vsha
3884406	POS New Order	Add Feature(s)	Anne Pe...	1759658	Submitted	01/09/2017 3:53 PM	idi_asul
3851261	POS New Order	Swap Equipment	Anne Pe...	1759658	Completed	12/07/2016 3:31 PM	idi_scheduler
3850961	POS New Order	Swap Equipment	Anne Pe...	1759658	Completed	12/07/2016 12:00 PM	idi_scheduler
3850960	POS New Order	Sell Retail	Anne Pe...	1759658	Completed	12/07/2016 12:00 PM	idi_scheduler
3850936	POS New Order	Swap Equipment	Anne Pe...	1759658	Completed	12/07/2016 11:16 AM	ONLN
3792184	POS New Order	Swap Equipment	Anne Pe...	1759658	Completed	10/17/2016 11:33 AM	idi_scheduler
					Completed	10/15/2016 6:00 PM	idi_scheduler

Results for matches on criteria related to the type of search (for example, Billing Order) are displayed on a second, appropriately named tab.



Billing Order ID	Order Type	Description	Customer Name	Account Number	Status	Create Date	Created By
1759658	POS New Order	Swap Equipment	Deboah K Henry	1683527	Completed	01/18/2012 2:41 AM	scheduler

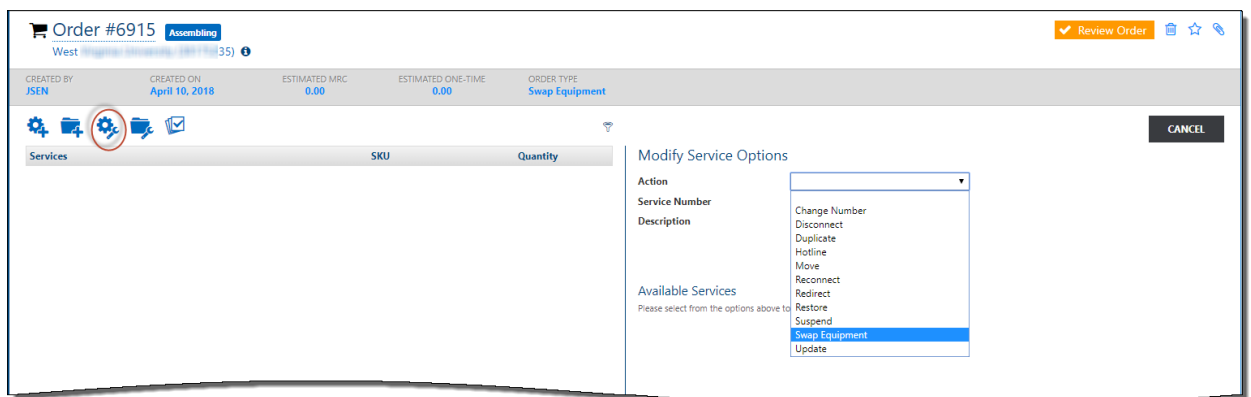
3 Orders

3.1 SWAP EQUIPMENT OPTION ON MODIFY SERVICE

The Modify Service function now supports Swap Equipment. This lets you associate a Mobile Directory Number (MDN) to a different Serial Number (ESN) to exchange a handset or a SIM card. **Note:** The service must be wireless-based and active.

To perform an equipment swap:

- On the Order Details form, click the Modify Service icon, and then select **Swap Equipment** from the **Action** drop down menu.



This displays a dialog for finding and selecting the service whose MDN you are moving to a new device. If the account has one or more services eligible to be swapped, they'll be listed in the *Available Services* pane. If the list is long, you can use the *Service Number* and/or *Description* fields to apply a filter. Click **SEARCH** after entering the filter value(s).

CANCEL

Modify Service Options

Action:

Service Number:

Description:

SEARCH

Available Services

- Wireless Service
 - 5-788

- Select the service whose MDN you want to move from the list of *Available Services*. This displays the initial Swap Equipment dialog. **Swap Reason** is a required field.

ADD TO ORDER
CANCEL

Modify Service Options

Action: Swap Equipment

Service Number:

Description:

SEARCH

Available Services

- Wireless Service
 - 58...88

⚙️ 58...88
Wireless Service

Service Number: 58...88

Billing Number: 58...799

Start Date: 03/06/2017

End Date:

Quantity: 1

Group:

State:

Zone:

Swap Reason*: Different Service/Product Needed

Swap Reason Details:

View Details

Details

Additional Information

Service Addresses

Tax Information

Equipment Information

- After selecting a Swap Reason and entering any other information that may be pertinent, click **Details** and select **Equipment Information** (or click **ADD TO ORDER**).

ADD TO ORDER
CANCEL

⚙️ 58...88
Wireless Service

Service Number: 58...88

Billing Number: 58...799

Start Date: 03/06/2017

End Date:

Quantity: 1

Group:

State:

Zone:

Swap Reason*: Different Service/Product Needed

Swap Reason Details:

⚙️ 58...88
Wireless Service

View Details

Details

Additional Information

Service Addresses

Tax Information

Equipment Information

Either action displays the dialog for completing the swap.

ADD TO ORDER
CANCEL

⚙️ 58...88
Wireless Service

Equipment Information

Technology Type: CDMA/TDMA

SIM Card ID:

Handset ID: 0001111111

Handset:

New Equipment Information

Technology Type: CDMA/TDMA

SIM Card ID:

Handset ID*:

Handset:

⚙️ 58...88
Wireless Service

View Equipment Information

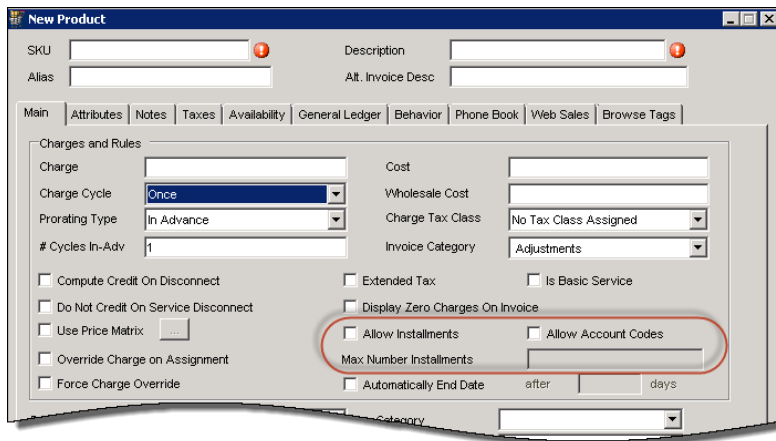
3.2 ADDING BILLING INSTALLMENT PLANS

On the Order Details form, when you are working with a Feature that is set up to allow installment plans (as specified in CostGuard Client Product Catalog), fields are available for adding an installment plan for the Feature.

3.2.1 SETUP

You can choose to include installments if:

- **One Price Package** is checked, the selected Charge Cycle = **Once** AND
- **Allow Installments** is checked

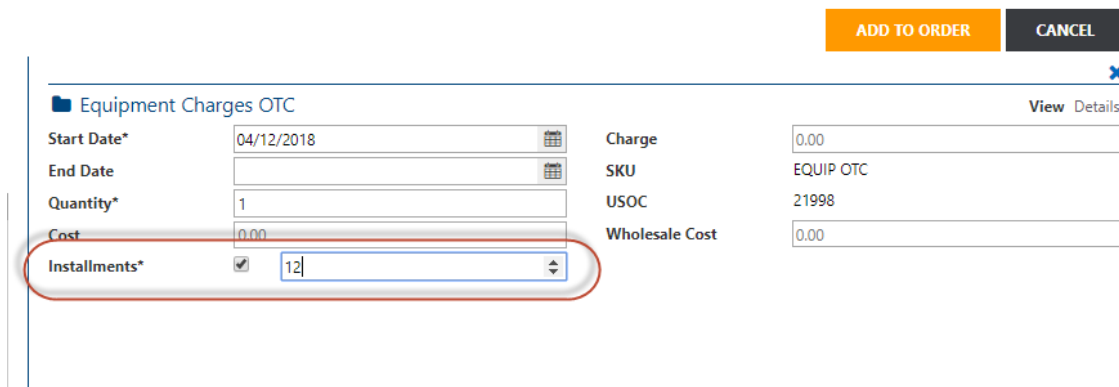


The screenshot shows the 'New Product' form with the 'Charges and Rules' section expanded. The 'Charge Cycle' is set to 'Once'. The 'Allow Installments' checkbox is checked and highlighted with a red circle. Other visible fields include 'Charge', 'Cost', 'Wholesale Cost', 'Prorating Type', 'Charge Tax Class', '# Cycles In-Adv', 'Invoice Category', and 'Max Number Installments'.

3.2.2 ADDING AN INSTALLMENT PLAN

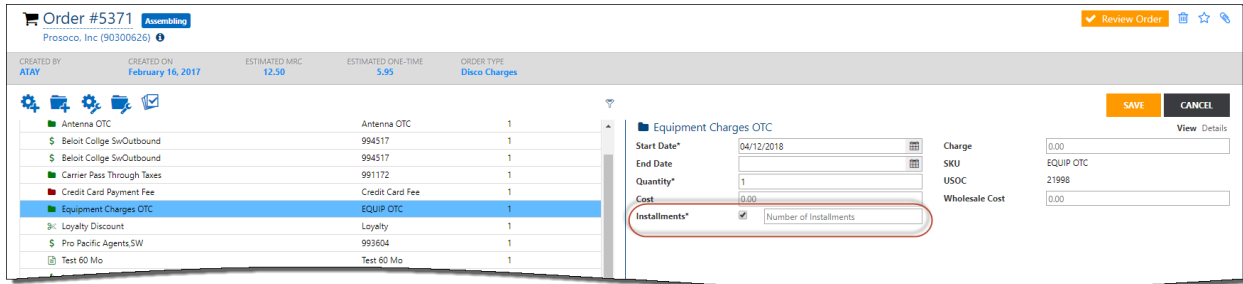
You can set up a Feature for installment payments when you initially add the Feature to the Order, or you can do it by editing the Feature in the Order Details view. After selecting a Feature that is set up to allow installments, check the **Installments** check box, then specify number of installments. Number of installments must be within maximum number of installments specified for the Feature in the Product Catalog.

On Add New Feature



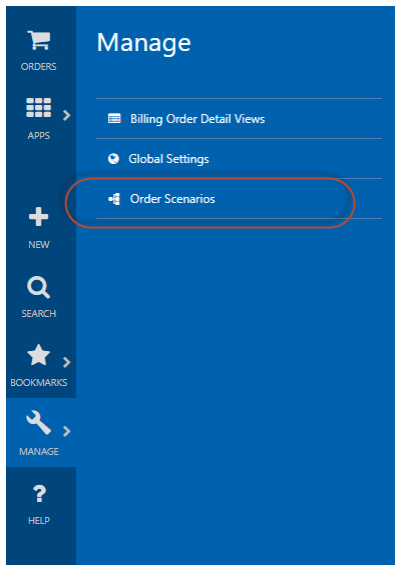
The screenshot shows the 'Equipment Charges OTC' form. The 'Installments*' field is checked and has a value of 12, which is highlighted with a red circle. Other fields include 'Start Date*' (04/12/2018), 'End Date', 'Quantity*' (1), 'Cost' (0.00), 'Charge' (0.00), 'SKU' (EQUIP OTC), 'USOC' (21998), and 'Wholesale Cost' (0.00). There are 'ADD TO ORDER' and 'CANCEL' buttons at the top right.

On Edit Feature



3.3 MANAGE MENU – ORDER SCENARIOS

In the **MANAGE** menu, the Configured Workflows option has been renamed **Order Scenarios**.



This name provides a clearer description of the configurable actions being performed. The Order Scenarios form provides the same functionality as the old Configured Workflows form.

CostGuard

Order Scenarios

Processing Order

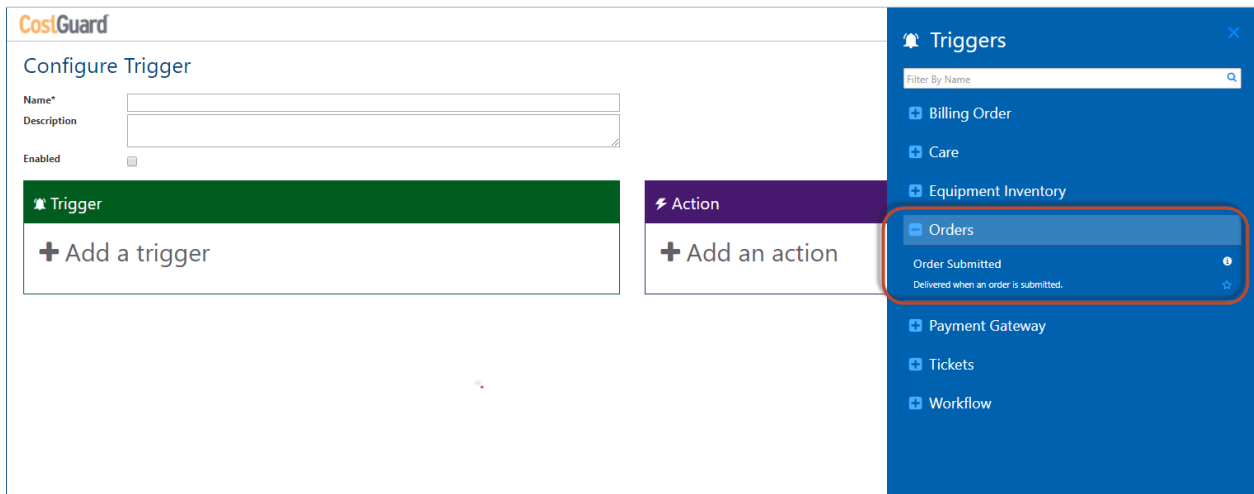
↕ REORDER
+ NEW

Select an order scenario to view details.

- No_Cart_Conversion
Ticket Workflow
- Default Configuration
Order Processing Workflow
- KCAP
- WF Config Edited by Automation
Order Processing Workflow
- Required Fields Validation_3478355238
Ticket Workflow

3.4 ORDER SUBMITTED TRIGGER

In the Workflow module, when adding a Trigger (**CONFIGURE > Triggers**), the *Order Submitted* Trigger is now available for selection. This Trigger executes the selected Action when an Order is submitted.



The screenshot shows the 'Configure Trigger' interface in CostGuard. On the left, there are input fields for 'Name*', 'Description', and an 'Enabled' checkbox. Below these is a 'Trigger' section with a '+ Add a trigger' button. On the right, there is an 'Action' section with a '+ Add an action' button. A blue dropdown menu titled 'Triggers' is open, showing a search bar and a list of categories: Billing Order, Care, Equipment Inventory, Orders, Payment Gateway, Tickets, and Workflow. The 'Orders' category is selected and highlighted with a red box, and its sub-item 'Order Submitted' (with the description 'Delivered when an order is submitted.') is also highlighted with a red box.

3.4.1 TRIGGER DETAILS

Trigger Details

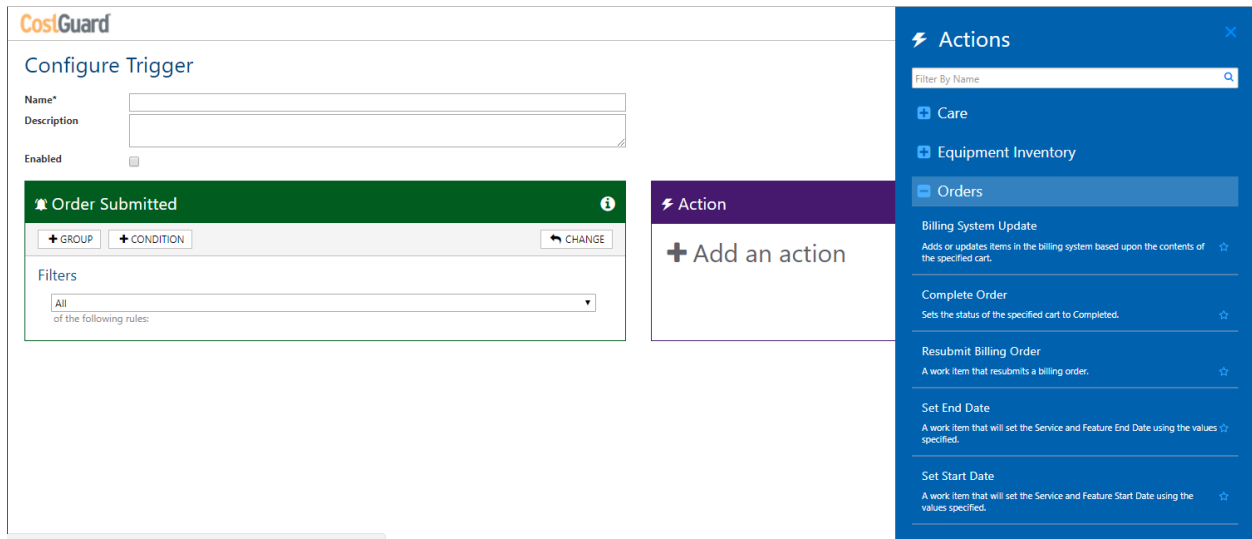
Order Submitted

Delivered when an order is submitted.

Properties

Name	Type	Description
BillingOrderID	Integer	Unique identifier for the billing order associated with this order.
CreateDate	Date & Time	Date and time the order was created.
CreateUser	Text	Username of the person who created the order.
CustomerID	Integer	Unique identifier for the customer associated with this order, if there is one.
EstimatedCompleteDate	Date & Time	Date and time the orders is estimated to complete by.
OrderDetailsLink	Text	Link to the order details information.
OrderID	Integer	Unique identifier for the order that was submitted.
OrderTypeID	Integer	Unique identifier for the type of order associated with this order.
Scenario	Text	Name of the scenario the contents of the order represents.
SubmitDate	Date & Time	Date and time that the order was submitted.
SubmitOrderGUID	Text	Unique submit identifier for this order.
Title	Text	Title given to this order.

3.4.2 SELECTING AN ACTION



The screenshot displays the 'Configure Trigger' interface for the 'Order Submitted' trigger. The trigger is currently disabled. The 'Filters' section is set to 'All of the following rules'. An 'Action' panel is open, showing a list of available actions:

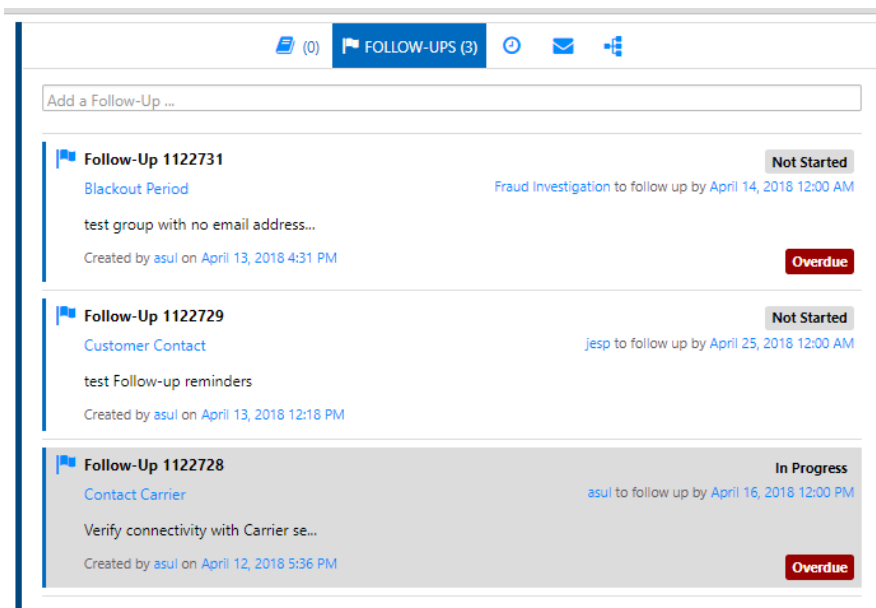
- Care
- Equipment Inventory
- Orders
 - Billing System Update: Adds or updates items in the billing system based upon the contents of the specified cart.
 - Complete Order: Sets the status of the specified cart to Completed.
 - Resubmit Billing Order: A work item that resubmits a billing order.
 - Set End Date: A work item that will set the Service and Feature End Date using the values specified.
 - Set Start Date: A work item that will set the Service and Feature Start Date using the values specified.
 - Update Billing Status

4 Follow-ups and Reminders on Tickets

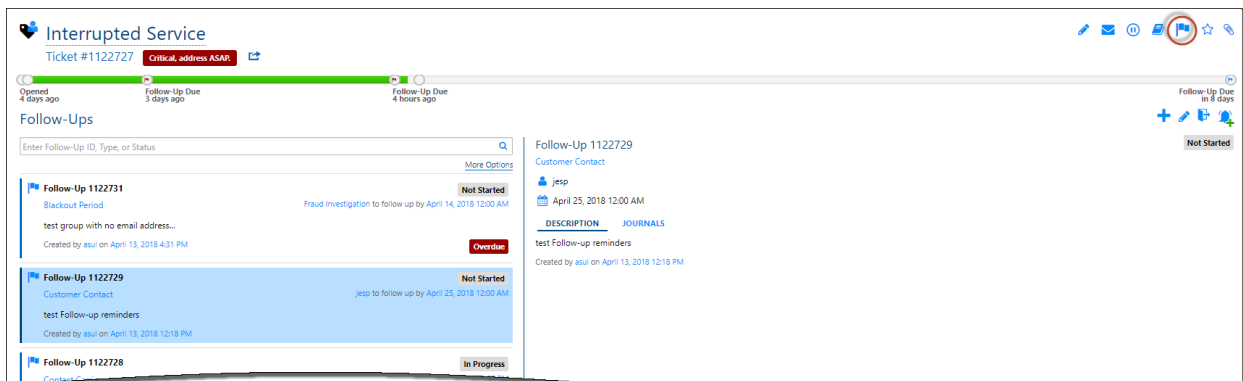
With this release, authorized users can now add Follow-ups to a Ticket, and set up Follow-up reminders. See *Setup* for required permissions.

4.1 WORKING WITH FOLLOW-UPS ON A TICKET

The Tickets InfoCenter has a new tab for viewing/adding Follow-ups. From the InfoCenter tab, you can view existing Follow-ups and add a new Follow-up. Clicking on a Follow-up in the InfoCenter takes you to a more detailed view of the Follow-up on the Follow-up page where you can view, add and manage Follow-ups for the Ticket.

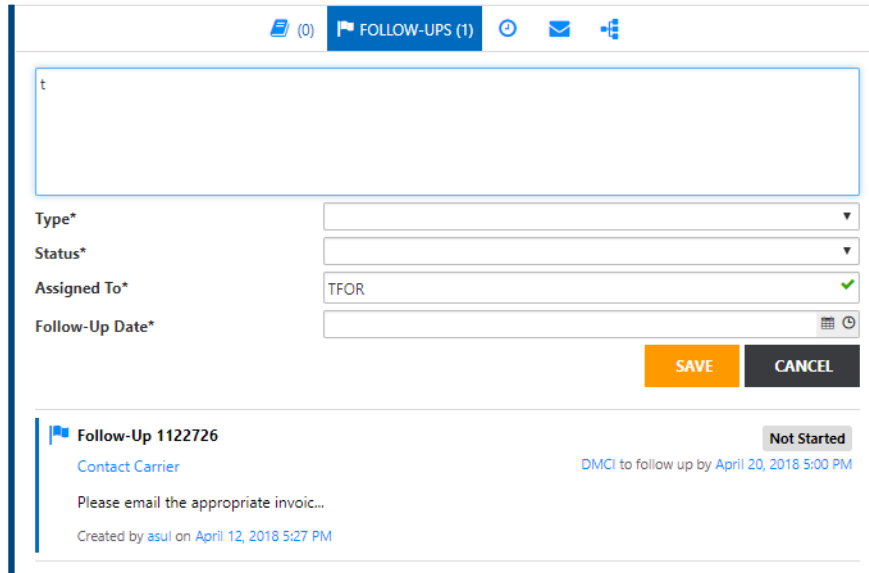


You can also open the Follow-ups page by clicking the Follow-up icon in the action bar (upper right corner).



4.1.1 ADDING A FOLLOW-UP VIA THE INFOCENTER

To add a Follow-up from this view, begin by entering the Follow-up Description. This displays the other fields for entering a Follow-up.

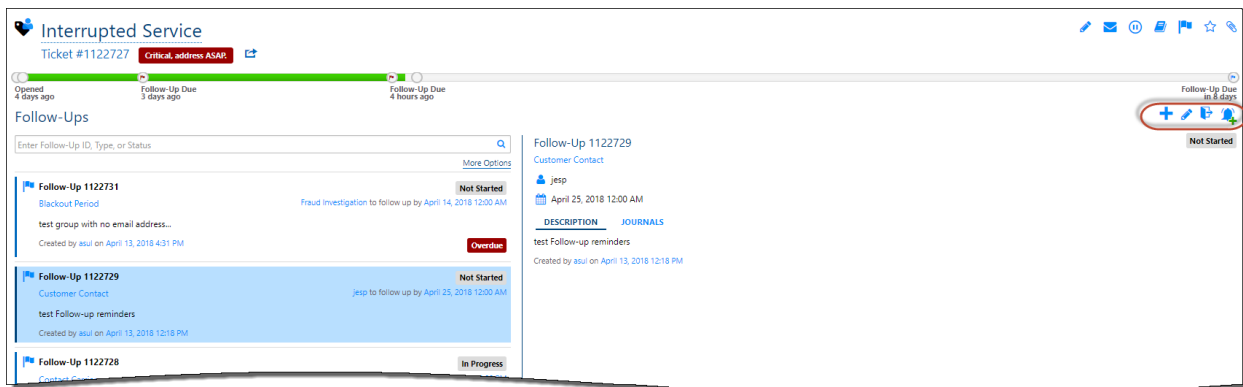


Type	Select from the drop-down list.
Status	Select from the drop-down list.
Assign To	Specify the person or group responsible for working this Follow-up
Description	Describe the purpose of this Follow-up
Date	Date and time the person/group assigned to this follow-up needs to take action on this follow-up.

4.1.2 FOLLOW-UP PAGE

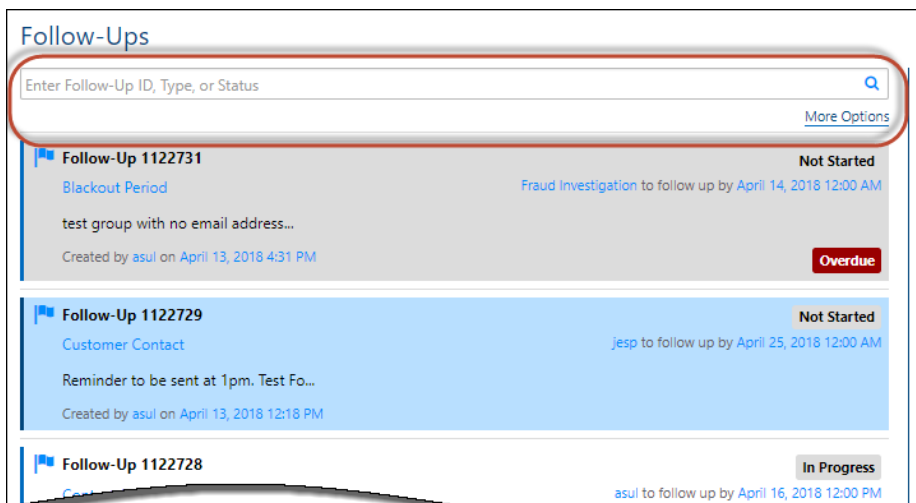
In addition to viewing and adding Follow-ups, the Follow-ups page lets you edit or close a Follow-up, and add reminders for assigned users to alert them to the approaching due date/time.

Selecting a Follow-up from the list at the left displays additional details in the right pane, and provides icons for adding, editing closing, and adding/removing a reminder.



Managing the Follow-ups List

If you open the page by clicking the Follow-up icon in the action bar, all Follow-ups are listed by default. You can choose to view a specific Follow-up by using the search fields. Enter a Follow-up ID, Type or Status, or click **More Options** for additional search criteria.



If you open this page by selecting a Follow-up in the InfoCenter, only that Follow-up will be listed by default. You can expand the list to show all Follow-ups for the Ticket by clicking the **Remove this filter** link.

Follow-Ups

🔍

[More Options](#)

Follow-Up 1122729

Customer Contact

Reminder to be sent at 1pm. Test Fo...

Created by asul on April 13, 2018 12:18 PM

Not Started

jesp to follow up by April 25, 2018 12:00 AM

You are viewing a single item. [Remove this filter.](#)

Follow-up Tabs

The right side of this page provides two tabs for viewing Follow-up information:

- Description (default view)
- Journals

A third Additional Information tab is available when applicable.

+
✎
🔄
🔔

Not Started

Follow-Up 1122726

Contact Carrier

👤 DMCI

📅 April 20, 2018 5:00 PM

DESCRIPTION
JOURNALS

Please email the appropriate invoice to Anne Pearson.

Created by asul on April 12, 2018 5:27 PM

Adding a Follow-up

Click **+** to add a new Follow-up, and use the resulting view to enter the Follow-up information.

in 9 days

SAVE
CANCEL

New Follow-Up

Type*

Status*

Description*

Assign To*

Follow-Up Date*

Editing a Follow-up

Click the Edit (pencil) icon to display a dialog for editing the selected Follow-up.

Follow-Up 1122729
Customer Contact
jesp
April 25, 2018 12:00 AM
DESCRIPTION JOURNALS
test Follow-up reminders
Created by asul on April 13, 2018 12:18 PM



Closing a Follow-up

Click the Close icon to close the selected Follow-up.

Follow-Up 1122729
Customer Contact
jesp
April 25, 2018 12:00 AM
DESCRIPTION JOURNALS
test Follow-up reminders
Created by asul on April 13, 2018 12:18 PM




The Close dialog displays a warning that the Follow-up cannot be modified once it's closed, and provides a drop down to specify the status once the Follow-up is closed. **Note:** If a Follow-up is closed before a reminder is due to be sent, the reminder will not be sent.

You can cancel out of the Close action if needed.

Close Follow-Up

Status

 Once a Follow-Up has been closed it can no longer be modified.

Working with Reminders

A reminder sends an email to the assigned user/group to alert them when the due date/time is near. You can set the reminder to be sent *n* days or hours before the due date/time.

Reminder functionality must be enabled in your system as described in *Setup*. Enabling creates a recurring trigger with a *Send Follow-up Reminder* action, and makes the Add/Remove Reminder icon available, as applicable, in the Follow-up Details view.



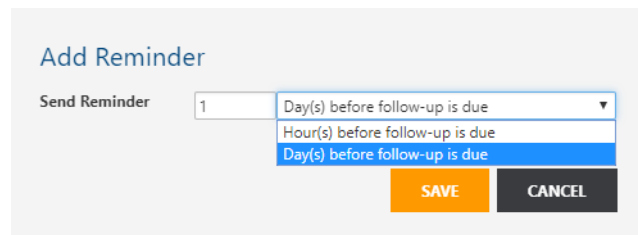
Follow-Up 1122729
Customer Contact

 jesp
 April 25, 2018 12:00 AM

DESCRIPTION **JOURNALS**

test Follow-up reminders
Created by asul on April 13, 2018 12:18 PM

The Add Reminder icon (bell with green +) is available if the functionality has been enabled, the due date/time is in the future, and the Ticket does not yet have a reminder scheduled. Clicking the Add Reminder icon displays the dialog for specifying when the reminder should be sent. You can specify the interval to send the reminder as *n* hours or days before the follow-up is due. The interval defaults to one (1) day. The recurring trigger runs hourly to check for eligible reminders to send.



Add Reminder

Send Reminder Day(s) before follow-up is due


Hour(s) before follow-up is due
Day(s) before follow-up is due

SAVE **CANCEL**

The presence of a reminder on a Follow-up is indicated by a blue bell. Hover text for the bell icon provides details of when the reminder will be sent. Also, the Add Reminder icon will change to Remove mode (red X).



Follow-Up 1122726 
Contact Carrier

 DMCI
 April 20, 2018 5:00 PM

DESCRIPTION **JOURNALS**

Please email the appropriate invoice to Anne Pe...
Created by asul on April 12, 2018 5:27 PM

Clicking the Remove Reminder icon displays a warning that lets you confirm the removal (**YES**) or cancel **NO**).

Note: Reminders are automatically removed once the email has been sent.

Considerations for reminders:

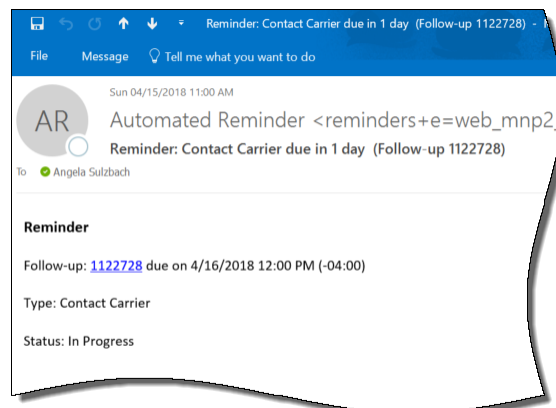
- A follow-up can only have one unsent reminder. The option to add a reminder is not available when there is already an unsent reminder on the follow-up.
- There is no option to edit a reminder. To change a reminder, first remove and then add a new reminder.
- Follow-ups with a follow-up date in the past cannot have a reminder added. You can change the date to be in the future, and then add a reminder.
- Once the reminder is sent, the bell no longer appears on the follow-up. A new reminder can be added if the follow-up date is in the future.
- Reminders do not account for weekends or holidays.
- Reminder emails that have been sent are viewable only in the Communications module. There is no history of them in Tickets.
- If a follow-up is closed before a reminder is due to be sent, the reminder will not be sent.

Reminder Email

When the current date/time reaches the reminder interval, the email is sent to the email address of the assigned to user. Both SaaS Security users and CostGuard user groups are supported.

Note: If for some reason the user or user group does not have an email address configured, a reminder will not be sent. There is no indication that the email address is not available.

- **From Address:** from alias and address that is configured in Workflow trigger
- **To Address:** email address of the assigned user on the follow-up
- **Subject:** Reminder: <Follow-up type> due in <n hours/days> (Follow-up #####)
- **Body:** contains the follow-up id (as a hyperlink to the follow-up), the follow-up date, follow-up type and follow-up status.



4.2 SETUP

4.2.1 PERMISSIONS

Adding/Editing Follow-ups requires the new *Add/Edit Follow-Ups* permission. This permission has been added to the Tickets Support Desk and Tickets Technician delivered roles.

Enabling/disabling reminders requires *Manage Configurations* permission.

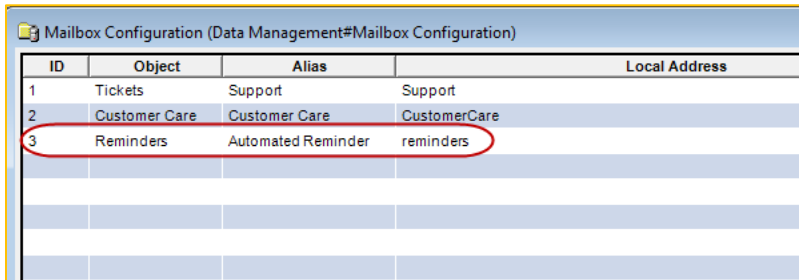
4.2.2 REMINDER SETUP

Communications

Communications must be configured for the environment to support reminders.

Mailbox Configuration

A new entry has been added in the Mailbox Configuration in Admin Console for Reminders - Data Management > Mailbox Configuration



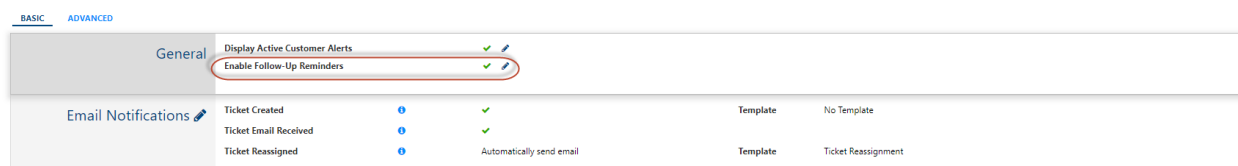
ID	Object	Alias	Local Address
1	Tickets	Support	Support
2	Customer Care	Customer Care	CustomerCare
3	Reminders	Automated Reminder	reminders

This entry contains the from email address for reminders. No action is required for this setting, unless you require a different value for alias or local address.

New Tickets Setting

A new setting is available via **MANAGE > Settings** to enable reminder functionality in Tickets. The setting is disabled by default. No reminder functionality is available until the setting is enabled. Toggling this setting requires *Manage Configurations* permission. **Note:** This setting is only available if Communications is configured for the environment.

Settings



General		Display Active Customer Alerts	Enable Follow-Up Reminders
Email Notifications		Ticket Created	Ticket Email Received
		Ticket Reassigned	

Enabling the setting adds a *Recurring Workflow* Trigger with the *Send Follow-up Reminder* action, and makes the Add/Remove Reminder icon available on the Follow-up Details view. Disabling Reminders removes the Trigger and icon.

Workflow

The Recurring Workflow trigger will run hourly to send eligible reminders.

Configure Trigger EDIT

Name* [System Follow-Up Reminders] Follow-Up Reminder Handler

Description This trigger was generated by Tickets to handle automated follow-up reminders. Please do not delete or alter this trigger.

Enabled

🔔 Recurring Trigger
ℹ️

Scheduling Start and Stop Configuration

Start Date* **End Date**

Scheduling Pattern Configuration

Occurs*

Every* **Hour(s)**

At*

⚡ Send Follow-up Reminder

Parameters

Interval Offset

From Alias*

From Address*

DELETE
SAVE
CANCEL

- **Interval Offset:** This value is set to 1 hour, and is used in the selection criteria for eligible reminders. Reminders will be selected and sent up to 1 hour before they are due to be sent.
- **From Alias:** This value is set from the Mailbox Configuration entry for Reminders. It is used as the email alias on the from address for reminder emails.
- **From Address:** This is used as the from email address on reminder emails. This is populated from the local address on the Mailbox Configuration for reminders combined with the subdomain and domain from Communications configuration.

5 Wholesale Billing Reports

These reports complement CostGuard’s Wholesale Billing solution by facilitating reporting (auditing) of the usage and product margins for the wholesaler(s) and the reseller(s).

The reports, coupled with out-of-the box functionality (e.g. sorting, filtering and totaling, exporting, etc.), can also be used to perform research and analysis.

These reports are available in CostGuard’s Report Explorer in the Finance->Wholesaler & Reseller Reports folder:

- Wholesaler Product and Usage Summary
- Wholesaler Product and Usage Detail
- Reseller Product and Usage Summary
- Reseller Product and Usage Detail

5.1 WHOLESALER PRODUCT AND USAGE SUMMARY

This report is for wholesalers and displays the applicable Product and Usage totals, with columns for Cost and Cost Margins.

5.1.1 PARAMETERS

Parameter	Required?	Default	Database Table and Column
Sales Entity	No	All	Drop-down for selecting a Sales Channel, Associate or All Sales Channels. This parameter enforces the User Limit To Profile functionality that may limit access to results based on the specific Sales Entity.
Market	No	All	Combo box/drop-down for selecting a specific Market or All Markets. This parameter enforces the Use Limit To Profile functionality that may limit access to results based on the specific Market or Markets.
Bill Period Ending	Yes	No	Drop-down for selecting a billed billing period.

5.1.2 COLUMNS

Name	Description
Market	Market Name
Channel Partner Code	Channel Partner Code
Channel Partner	Channel Partner Name
Sales Person Code	Sales Person Code
Salesperson	Sale Person Name
Type	Populated with one of the following: Recurring Products, Non-Recurring Products, or Usage.
Units	Only applicable when Type = Usage. Value represents the sum of the usage’s units (e.g. number of Minutes for a voice-related usage type or number of messages for an SMS-related Usage Type). This column is not totaled.
Occurrences/Quantity	When Type = Usage, displays the Occurrences count When Type = Recurring or Non-Recurring Product, displays the quantity of the assigned instances. This column is not totaled.
Cost	Amount it costs the service provider to deliver the service.

	<p>Typically, this value is determined outside of CostGuard but it can be stored on usage and products for reference and reporting.</p> <ul style="list-style-type: none"> For Usage, this value is provided to and saved by CostGuard on the usage detail record. For Recurring or Non-Recurring Products this is the value configured in the Cost Field.
Wholesale Cost	<p>Amount the service provider charges the reseller for the service. For usage, this value is calculated by CostGuard based on configured wholesale Pricing Plans. For features this is set by the service provider.</p> <ul style="list-style-type: none"> When CostGuard detects an applicable wholesale Pricing Plan is assigned, it will calculate the amount and stores it the Wholesale Cost field on the usage detail record. For Recurring or Non-Recurring Products this is the value configured in the Wholesale Cost Field.
Charge	<p>Amount the end-subscriber is 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.</p> <ul style="list-style-type: none"> When CostGuard detects an applicable retail Pricing Plan is assigned, it will calculate the rate and store it the Charge field on the usage detail record. For Recurring or Non-Recurring Products, this amount is based on the value configured in the Charge Field.
Margin	Value calculated as Wholesaler Cost – Cost.
Margin %	Value calculated as (Wholesaler Cost – Cost/Cost) *100
Reseller Margin	Value calculated as Charge – Wholesaler Cost.
Reseller Margin %	Value calculated as (Charge - Wholesaler Cost/Wholesaler Cost) *100

5.2 WHOLESALER PRODUCT AND USAGE DETAIL

This report is for wholesalers and displays the applicable Product and Usage totals by each Product (SKU) and/or Usage Type (and then by the Customer’s Account Number, applicable).

5.2.1 PARAMETERS

Name	Required?	Default	Database Table and Column
Sales Entity	No	No	Drop-down for selecting a Sales Channel, Associate or All Sales Channels. This parameter enforces the User Limit To Profile functionality that may limit access to results based on the specific Sales Entity.
Market	No	No	Combo box/drop-down for selecting a Market or All Markets. This parameter enforces the User Limit To Profile functionality that may limit access to results based on the specific Market or Markets.
Account Number	No	No	Text box for entering Account Number. No entry will return details for all accounts.
Bill Period Ending	Yes	No	Drop-down for selecting a billed billing period.

5.2.2 COLUMNS

Name	Description
Market	Market Name
Channel Partner Code	Channel Partner Code
Channel Partner	Channel Partner Name
Sales Person Code	Sales Person Code
Salesperson	Sale Person Name
Type	Populated with one of the following: Recurring Products, Non-Recurring Products, or Usage.
SKU/Usage Type	Configured SKU for a Product or the Usage Type ID for Usage.
Description	Configured Description for the listed Product or the Usage Type Description for Usage.
Units	Only applicable when Type = Usage. Value represents the sum of the Usage Type's units (e.g. number of Minutes for a voice-related usage type or number of messages for an SMS-related Usage Type). This column is not totaled.
Occurrences/Quantity	When Type = Usage, value = Occurrences count. When Type = Recurring or Non-recurring Product, value = quantity of the assigned instances. This column is not totaled.
Cost	Amount it costs the service provider to deliver the service. Typically, this value is determined outside of CostGuard but it can be stored on usage and products for reference and reporting. <ul style="list-style-type: none"> For Usage, this value is provided to and saved by CostGuard on the usage detail record. For Recurring or Non-Recurring Products this is the value configured in the Cost Field.
Wholesale Cost	Amount service provider charges the reseller for the service. For usage, this value is calculated by CostGuard based on configured wholesale Pricing Plans, for features this is set by the service provider. <ul style="list-style-type: none"> When CostGuard detects an applicable wholesale Pricing Plan is assigned, it will calculate the amount and stores it the Wholesale Cost field on the usage detail record. For Recurring or Non-Recurring Products this is the value configured in the Wholesale Cost Field.
Charge	Amount end-subscriber is 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. <ul style="list-style-type: none"> When CostGuard detects an applicable retail Pricing Plan is assigned, it will calculate the rate and store it the Charge field on the usage detail record. For Recurring or Non-Recurring Products, this amount is based on the value configured in the Charge Field.
Margin	Value calculated as Wholesaler Cost – Cost.
Margin %	Value calculated as (Wholesaler Cost – Cost/Cost) *100
Reseller Margin	Value calculated as Charge – Wholesaler Cost.
Reseller Margin %	Value calculated as (Charge - Wholesaler Cost/Wholesaler Cost) *100

5.3 RESELLER PRODUCT AND USAGE SUMMARY

This report is for resellers and displays the applicable Product and Usage totals.

5.3.1 PARAMETERS

Parameter	Required?	Default	Database Table and Column
Sales Entity	No	All	Drop-down for selecting a Sales Channel, Associate or All Sales Channels. This parameter enforces the User Limit To Profile functionality that may limit access to results based on the specific Sales Entity.
Market	No	All	Combo box/drop-down for selecting a specific Market or All Markets. This parameter enforces the Use Limit To Profile functionality that may limit access to results based on the specific Market or Markets.
Bill Period Ending	Yes	No	Drop-down for selecting a billed billing period.

5.3.2 COLUMNS

Name	Description
Market	Market Name
Salesperson	Sale Person Name
Type	Populated with one of the following: Recurring Products, Non-Recurring Products, or Usage.
Units	Only applicable when Type = Usage. Value represents the sum of the usage's units (e.g. number of Minutes for a voice-related usage type or number of messages for an SMS-related Usage Type). This column is not totaled.
Occurrences/Quantity	When Type = Usage, displays the Occurrences count When Type = Recurring or Non-Recurring Product, displays the quantity of the assigned instances. This column is not totaled.
Wholesale Cost	Amount the service provider charges the reseller for the service. For usage, this value is calculated by CostGuard based on configured wholesale Pricing Plans. For features this is set by the service provider. <ul style="list-style-type: none"> When CostGuard detects an applicable wholesale Pricing Plan is assigned, it will calculate the amount and stores it the Wholesale Cost field on the usage detail record. For Recurring or Non-Recurring Products this is the value configured in the Wholesale Cost Field.
Charge	Amount the end-subscriber is 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. <ul style="list-style-type: none"> When CostGuard detects an applicable retail Pricing Plan is assigned, it will calculate the rate and store it the Charge field on the usage detail record. For Recurring or Non-Recurring Products, this amount is based on the value configured in the Charge Field.
Reseller Margin	Value calculated as Charge – Wholesaler Cost.
Reseller Margin %	Value calculated as (Charge - Wholesaler Cost/Wholesaler Cost) *100

5.4 RESELLER PRODUCT AND USAGE DETAIL

This report is for resellers and displays the applicable Product and Usage totals by each Product (SKU) and/or Usage Type (and then by the Customer's Account Number, applicable).

5.4.1 PARAMETERS

Name	Required?	Default	Database Table and Column
Sales Entity	No	No	Drop-down for selecting a Sales Channel, Associate or All Sales Channels. This parameter enforces the User Limit To Profile functionality that may limit access to results based on the specific Sales Entity.
Market	No	No	Combo box/drop-down for selecting a Market or All Markets. This parameter enforces the User Limit To Profile functionality that may limit access to results based on the specific Market or Markets.
Account Number	No	No	Text box for entering Account Number. No entry will return details for all accounts.
Bill Period Ending	Yes	No	Drop-down for selecting a billed billing period.

5.4.2 COLUMNS

Name	Description
Market	Market Name
Channel Partner Code	Channel Partner Code
Channel Partner	Channel Partner Name
Sales Person Code	Sales Person Code
Salesperson	Sale Person Name
Type	Populated with: Recurring Products, or Non-Recurring Products, or Usage.
SKU/Usage Type	Configured SKU for a Product or the Usage Type ID for Usage.
Description	Configured Description for the listed Product or the Usage Type Description for Usage.
Units	Only applicable when Type = Usage. Value represents the sum of the Usage Type's units (e.g. number of Minutes for a voice-related usage type or number of messages for an SMS-related Usage Type). This column is not totaled.
Occurrences/Quantity	When Type = Usage, value = Occurrences count. When Type = Recurring or Non-recurring Product, value = quantity of the assigned instances. This column is not totaled.
Wholesale Cost	Amount service provider charges 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. <ul style="list-style-type: none"> When CostGuard detects an applicable wholesale Pricing Plan is assigned, it calculates the amount and stores it in the Wholesale Cost field on the usage detail record. For Recurring or Non-Recurring Products this is the value configured in the Wholesale Cost Field.
Charge	Amount subscriber is 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. <ul style="list-style-type: none"> When CostGuard detects an applicable retail Pricing Plan is assigned, it calculates the rate and store it the Charge field on the usage detail record. For Recurring or Non-Recurring Products, this is the configured Charge value.
Reseller Margin	Value calculated as Charge – Wholesaler Cost.
Reseller Margin %	Value calculated as (Charge - Wholesaler Cost/Wholesaler Cost) *100

6 Receipt-style Report for Selected Payments

When the OSG application posts payments in CostGuard, the payments are only posted/displayed on the Balances tab of the customer’s account. For such payments that are only displayed within the ledger of the Balances tab, there was no way to print a receipt for these transactions.

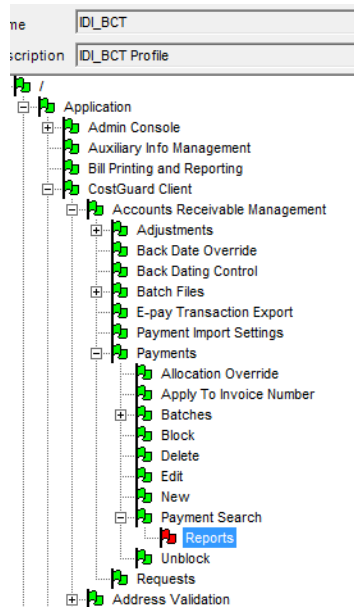
This solution provides a means to generate a receipt-style report for a selected payment on the Balances Tab or Payment Search Results. The report is referred to as *Payment Statement* so as not to be confused with actual receipts. It provides details regarding the Payment transaction including user, contact, remittance, tender and Payment details. The report may then be printed and/or used as an attachment to provide to a customer.

This solution includes:

- A right-click option on the Balances Tab and Payment Search Results to generate and print the Payment Statement for a selected item.
- New Permissions to regulate access and run the Payment Statement report.

6.1 PERMISSION

The path to the new permission is: Application/CostGuard Client/Account Receivable Management/Payments/Payment Search/Reports.



It defaults to Deny (red) and must be enabled (green) prior to use. This permission regulates access to the menu option in both the Payment Search Results and on Payments listed within the ledger of Customer’s Account - Balances Tab.

6.2 PAYMENT STATEMENT REPORT

This report provides details for a selected payment.

6.2.1 PARAMETERS

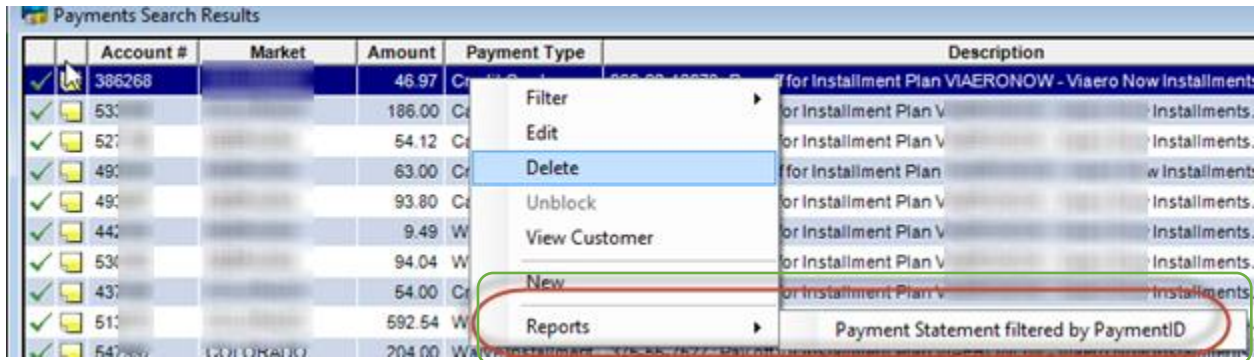
Name	Required?	Default Value	Description
Payment ID	Yes	NA	From the selected- payment, the report will use that payment's identification number to generate the report.

6.2.2 FIELDS/DETAILS

Name	Description
Payment ID	Unique value assigned by CostGuard that is payment-specific
Customer Account Number	Customer's CostGuard account identifier
Contact Name	Customer's billing contact name
Contact Address	Customer's primary billing contact address
Contact City	Customer's primary billing contact city
Contact State	Customer's primary billing contact state
Contact Zip	Customer's primary billing contact zip
Contact Phone	Phone number of the billing contact
Contact E-Mail	E-mail address of the primary billing contact
Remit Name	Remit name from the Customer's Market (i.e. Viaero Wireless)
Remit Address	Remit billing address
Remit City	Remit city
Remit State	Remit state
Remit Zip	Remit zip
Remit Phone	Remit Phone
Remit E-Mail	Remit E-mail address
Payment Description	Description of the payment
Payment Date	Date and time the transaction was entered in CostGuard
Payment Type	Type of the payment
Posted Date	Date and time the transaction was processed by CostGuard
Check Number	Check number of the check payment
Batch Number	Batch number of the batch payment
Payment Amount	Dollar amount of the transaction
Reversal Amount	Dollar amount of the reversal payment
Source Type	File, EPAY, Store, Direct
Source	If source type is 'Store' then Location Name, If source type is 'File' then Batch File Name, If source type is 'EPAY' then 'EPAY'
Receipt Number	If source type is 'Store' then it is CG-POS Receipt Number
Last Modified	Date and time the transaction was modified in CostGuard
User	User who entered the transaction in CostGuard

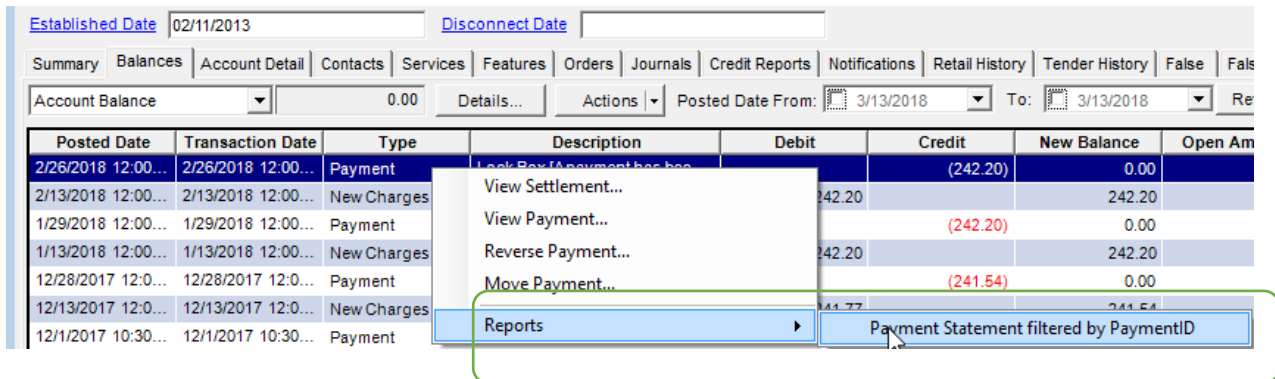
6.2.3 GENERATING A PAYMENT STATEMENT FROM ACCOUNTS RECEIVABLE PAYMENT SEARCH RESULTS

The Payment Statement may be run from the Payment Search Results available via Applications/Accounts Receivable Management/Payment Search/Payment Search Results. This report is run from the Reports menu, and the parameters are automatically inherited from the Parent Form (PaymentID) using the Filter functionality, as shown here:



6.2.4 GENERATING A PAYMENT STATEMENT FROM THE BALANCES TAB

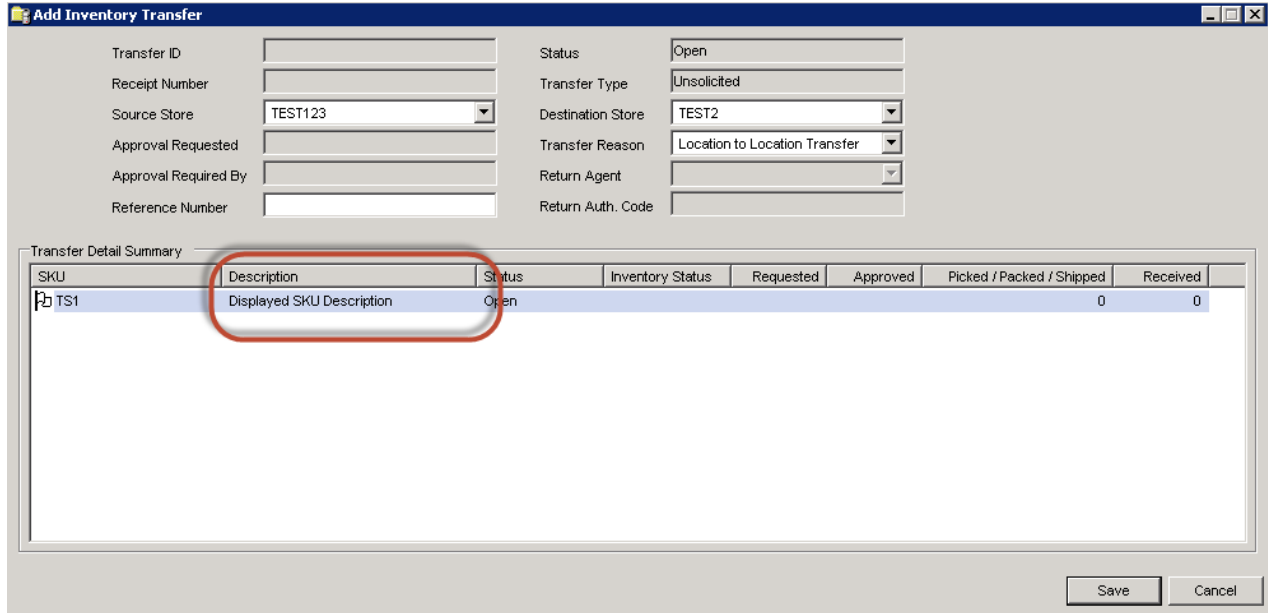
The Payment Statement may be run from the Balances Tab/Account Transactions Sub-form menu. This report is run from the Reports menu, and the parameters are automatically inherited from the Parent Form (PaymentID) using the Filter functionality, as shown here:



7 Add Description to POS Inventory Transfer and Receive Transactions

A Description column has been added to the transaction screens used when either creating a new inventory transfer or inventory receive.

Example: Add Inventory Transfer



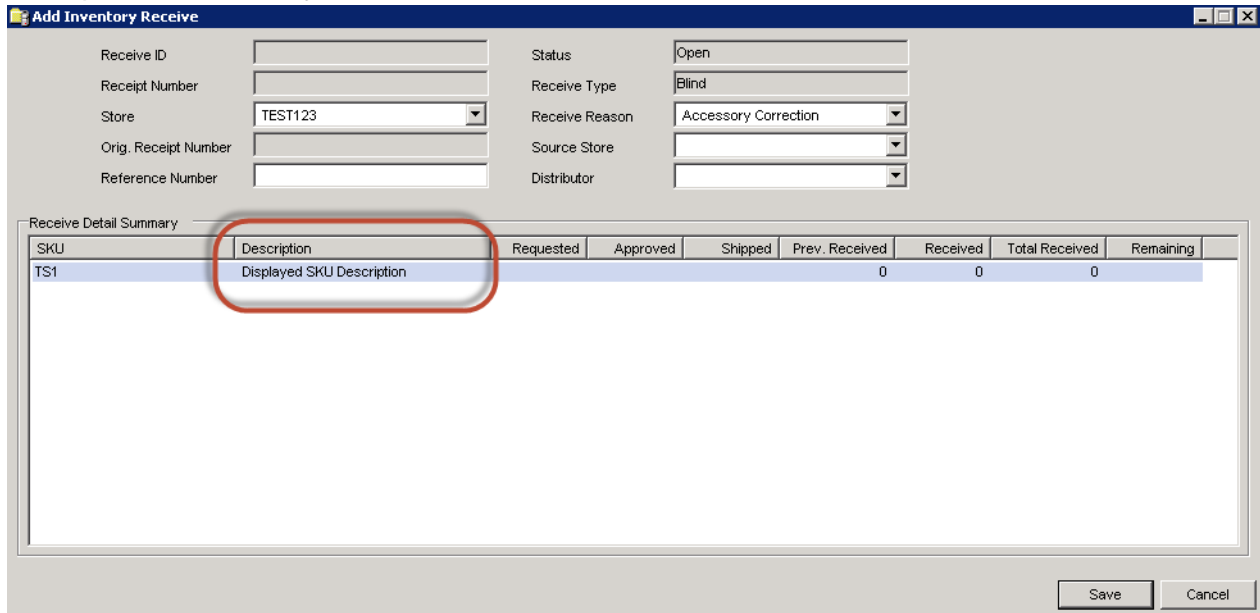
Add Inventory Transfer

Transfer ID: Status:
 Receipt Number: Transfer Type:
 Source Store: Destination Store:
 Approval Requested: Transfer Reason:
 Approval Required By: Return Agent:
 Reference Number: Return Auth. Code:

SKU	Description	Status	Inventory Status	Requested	Approved	Picked / Packed / Shipped	Received
TS1	Displayed SKU Description	Open				0	0

Save Cancel

Example: Add Inventory Receive



Add Inventory Receive

Receive ID: Status:
 Receipt Number: Receive Type:
 Store: Receive Reason:
 Orig. Receipt Number: Source Store:
 Reference Number: Distributor:

SKU	Description	Requested	Approved	Shipped	Prev. Received	Received	Total Received	Remaining
TS1	Displayed SKU Description				0	0	0	

Save Cancel

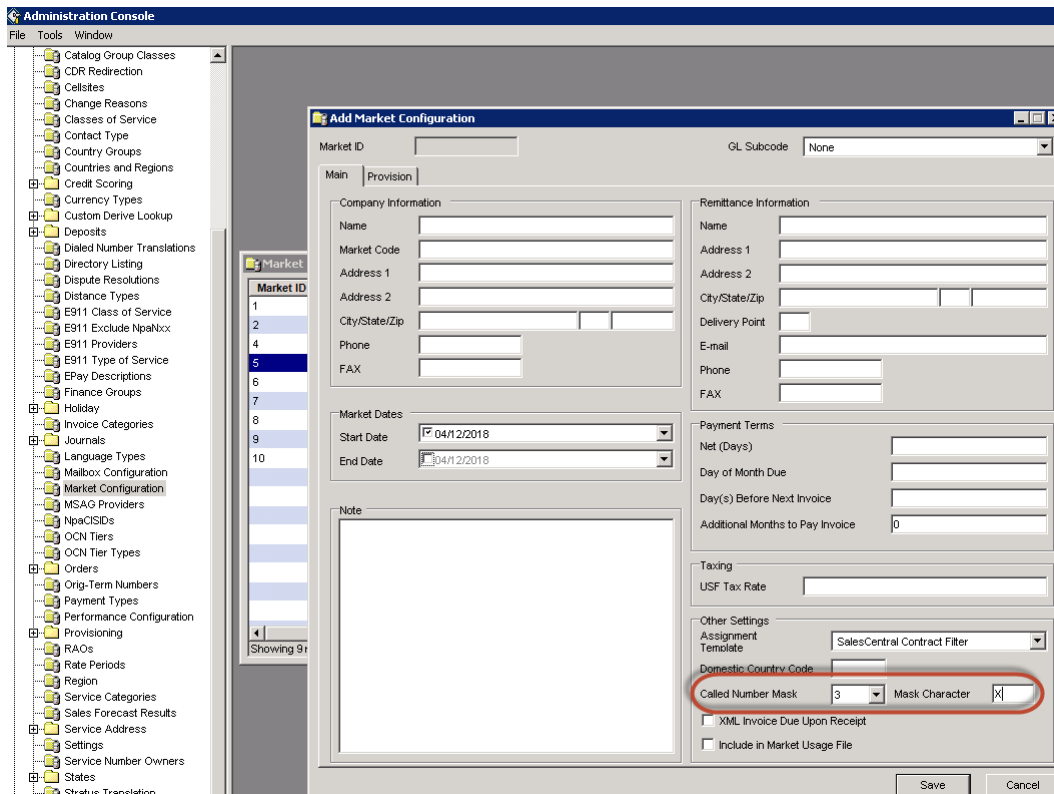
8 Mask Last Digits of Called Number (XML)

Certain European countries require the rightmost digits of the called number on all customer Invoices be masked out. This impacts all XML reports with customer facing usage detail. This does not affect usage detail shown in Customer Care or CostGuard Client.

Users will need to configure Markets to implement this functionality.

8.1 CALLED NUMBER MASK – NEW MARKET-LEVEL SETTINGS

Two new Market-level settings have been added to the Market Add/Edit form to specify if/how called number masking is handled for each Market. This form is available in Admin Console > Data Management > Market Configuration.



The screenshot shows the 'Add Market Configuration' form in the Administration Console. The form is divided into several sections: Company Information, Remittance Information, Market Dates, Payment Terms, Taxing, and Other Settings. The 'Called Number Mask' field in the 'Other Settings' section is highlighted with a red circle. It is set to '3' and the 'Mask Character' is 'X'. Other settings include 'Assignment Template' set to 'SalesCentral Contract Filter', 'Domestic Country Code', and checkboxes for 'XML Invoice Due Upon Receipt' and 'Include in Market Usage File'.

When set, this will cause a specified number of rightmost X digits in the called number to appear as a specified generic character – e.g. 585-924-XXXX

- **Called Number Mask** specifies the number of digits to mask. The selections are None, 1-9, and All (all masks the entire called number). Default = None.
- **Mask Character** specifies a single printable character to be used as the mask character. An UPPER or lowercase character may be specified. Default = blank (no called number mask). **Note:** Space character is not allowed

The resultant string is generated and saved in the BillingGroup table in a new column named CalledNumberMask. The data type of this column is varchar (10). When a called number mask is not specified for a market, the CalledNumberMask field will be saved as null in the database.

8.2 XML CHANGES

During XML generation, the Called Number Mask (if not null) from the customer’s market is used to overwrite the rightmost characters of the Other Party Number (terminating number in outgoing calls, originating number in incoming calls). The logic applies to both wireless usage (outgoing/incoming) and wireline usage (where base service type is 1=EA or 2=8XX).

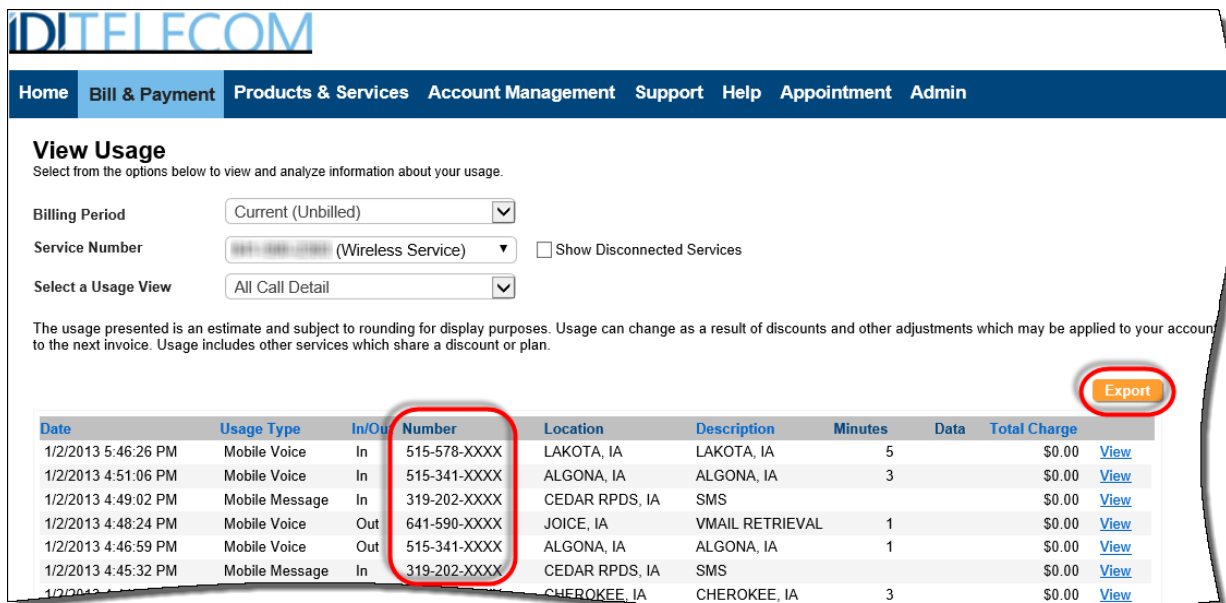
This affects all usage detail and usage export reports created during the XML Operation.

8.3 EXPORTED FILENAME EXTENSION

XML generation creates a ZIP file (for OnlineBill) that contains a CSV file of usage records. In the past, the contained file has been created with a .usg extension. Going forward it will be created with a .csv extension.

8.4 ONLINEBILL UPDATES

OnlineBill has been updated to adhere to the new market settings when displaying called numbers. On the view usage page, the Number column will mask according to the user’s market settings. The export button will also adhere to the new settings.



View Usage
Select from the options below to view and analyze information about your usage.

Billing Period:

Service Number: Show Disconnected Services

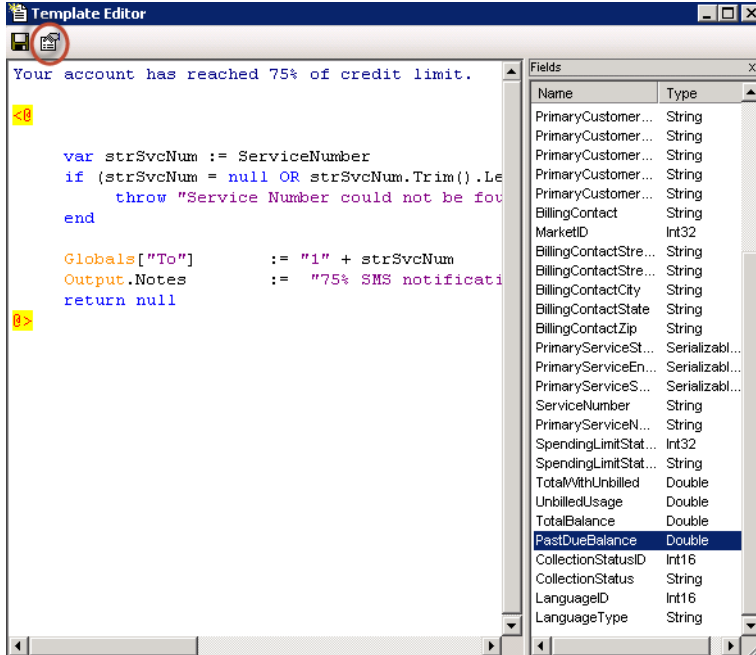
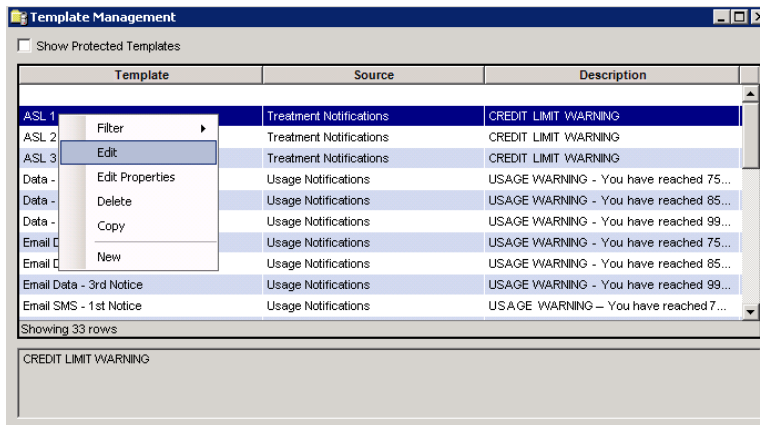
Select a Usage View:

The usage presented is an estimate and subject to rounding for display purposes. Usage can change as a result of discounts and other adjustments which may be applied to your account to the next invoice. Usage includes other services which share a discount or plan.

Date	Usage Type	In/Out	Number	Location	Description	Minutes	Data	Total Charge	
1/2/2013 5:46:26 PM	Mobile Voice	In	515-578-XXXX	LAKOTA, IA	LAKOTA, IA	5		\$0.00	View
1/2/2013 4:51:06 PM	Mobile Voice	In	515-341-XXXX	ALGONA, IA	ALGONA, IA	3		\$0.00	View
1/2/2013 4:49:02 PM	Mobile Message	In	319-202-XXXX	CEDAR RPDS, IA	SMS			\$0.00	View
1/2/2013 4:48:24 PM	Mobile Voice	Out	641-590-XXXX	JOICE, IA	VMAIL RETRIEVAL	1		\$0.00	View
1/2/2013 4:46:59 PM	Mobile Voice	Out	515-341-XXXX	ALGONA, IA	ALGONA, IA	1		\$0.00	View
1/2/2013 4:45:32 PM	Mobile Message	In	319-202-XXXX	CEDAR RPDS, IA	SMS			\$0.00	View
1/2/2013 4:45:32 PM	Mobile Message	In	319-202-XXXX	CHEROKEE, IA	CHEROKEE, IA	3		\$0.00	View

9 Collections Notification Template – Past Due Balance Option

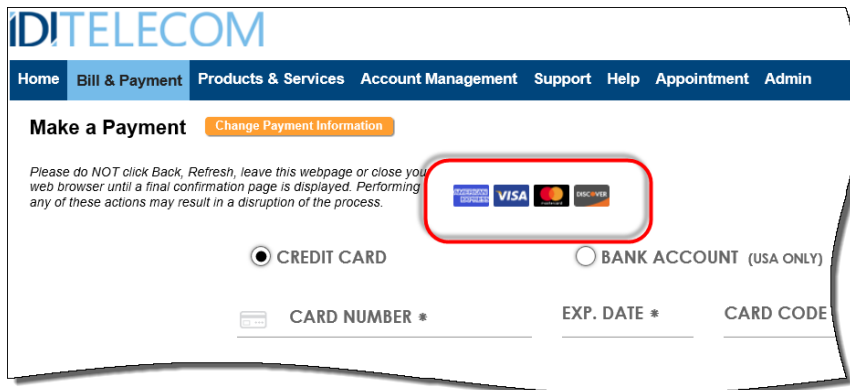
When you set up a Collections Notification Template, the Data Source now provides an option to include the Past Due Balance. This functionality is available to authorized users via BackOffice Management > Customer Notifications > Manage Templates. Choose to edit the applicable template, and then click the Data Source icon.



10 Miscellaneous Enhancements

10.1 DISPLAY ACCEPTED CREDIT CARDS IN ONLINEBILL

Accepted Credit Cards defined in the POS Register Policy for the OnlineBill location will display on the Make Payment Page.



10.2 OLB ADMIN ROLE

The OLB Admin Role now includes the Allow Logon permission and is consistent with other Admin roles for other IDI apps.



10.3 PRODUCT CATALOG DISPLAYS ACCOMMODATE LARGE USER NAMES

Previously when a username was longer than expected the *Last Modified* details were pushed to the next line and were not clearly shown. The applicable Product Catalog screens have been enhanced to accommodate large usernames (those used to create a new or to edit an existing Catalog Item). This enhancement applies to all Product Types in the Catalog, including:

- Product
- Package
- Service
- Discount
- Pricing Plan
- Folder

- Contract
- Contract Penalty
- Retail Product
- Advance Pay Product

Edit Package

SKU [redacted] Description [redacted]
Alias 1593 Alt. Invoice Desc [redacted]

Main | Taxes | Notes | Attributes | Availability | General Ledger | Behavior | Phone Book | W

Charge and Rules

One Price Package Choose 0
Charge 4.50 Cost [redacted]
Charge Cycle Monthly Wholesale Cost [redacted]
Prorating Type In Advance Charge Tax Class Wirele
Cycles In-Adv 1 Invoice Category Main

Compute Credit On Disconnect General Ledger at Component Lev
 Do Not Credit On Service Disconnect Display Zero Charges on Invoice
 Use Price Matrix ... Allow Installments
 Override Charge on Assignment Max # Installments [redacted]
 Force Charge Override Automatically End Date

Product Class None Class Of Service None
USOC [redacted] Discontinue Date [redacted]
Available Date 8/ 1/2006 Default Status None
Prov. Company None Default Billing Status Billin
Category Calling Features
Specification [redacted]

Last modified by: [redacted] on 11/18/2015 6:57:13 PM