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Core Release Bulletin

CostGuard Solution 18.6 Release

June 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 and other enhancements are included in this release.

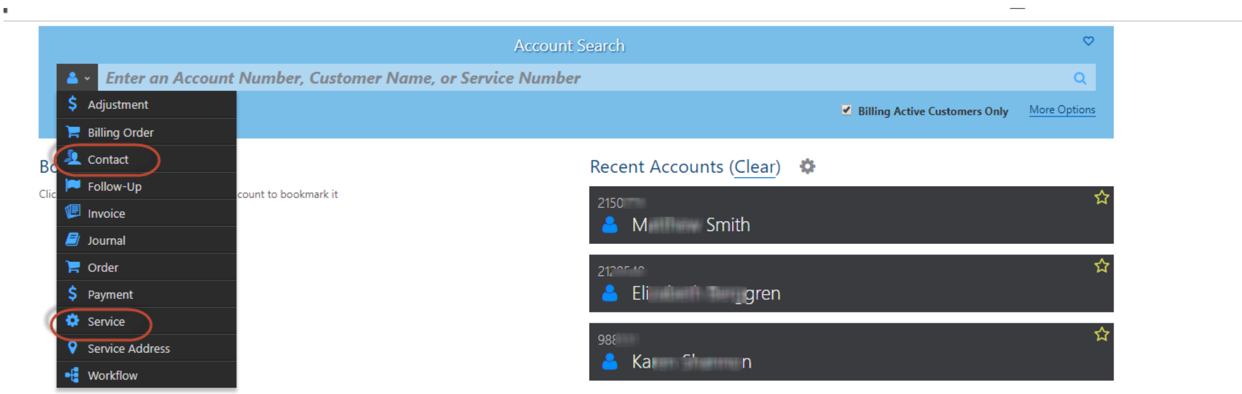
Functional Area	AR/FR	Description
Customer Care	FR 2859	**New *Add Journals* Permission -** A new *Add Journals* permission lets users add journals. The existing *Add/Edit Journals* permission has not changed. The new permission lets you create roles where a user can add journals without giving permission to edit journals.
	FR 2861	**OmniSearch Enhancements** – Users have the option to search on Services and Contacts.
	FR 2885	**Service Summary Option** – A Service Summary view is available on the Customer Summary page. The Customer Summary has a drop down menu that lets you toggle between the Service or Account Summary view. A new setting called **Default Summary View** is available under MANAGE > Settings to select the default view on an Environment basis.
	FR 2890	**Improved Navigation –** Users can opt to replace the multi-colored drop-down navigation menu with a static set of menu options directly available on all pages. A new setting called **Use Updated Customer Navigation** is available under MANAGE > Settings to select the multi-colored drop down or static menu. The current multi-colored menu is selected by default. **Ability to Edit *Tax Using* property** on a Service in Care
	AR 8082	**Data lookup for Customer Billing Information** which includes Region
Orders	FR 2889	**Submit Order Enhancement** – On submitting an Order via the Order Summary page, if there is an associated Workflow, the Workflow will be displayed on the Workflow tab without having to refresh the page. The system will poll for a Workflow instance once every second, for up to 30 seconds. If the Workflow is not created within the timeout period (30 seconds), users will need to refresh the page to see the Workflow.
Tickets	AR 8083	**Ability to modify/close Ticket from email -** Ability to modify a ticket from an incoming email. This uses the Workflow and Communications modules. The *close Ticket* capability works with the *Ticket Type* Communications template, where the template contains a *Reply/Mail To* link within the body of the template that can be clicked by the recipient to close the ticket.
Inventory	FR 2890	**Updated History Icon** in the InfoCenter to a more intuitive image of History
CostGuard Client – USOC Handling	AR 8111	**Ability to handle longer USOC values** (up to 50 characters) - Updates Product Catalog and Customer Management.
Corporate Accounts	FR 2855	**Option to disallow payments to a non-invoice-responsible account** – new CostGuard Client setting.
RateBill	FR 2628	**Rating Enhancements** – to prevent worker contention and dead lock issues. There is a new Admin Console setting called *Disable Shared Grant Staging* under *Business Rules* > *Local* Services >*RateBill* > *RateBill Configuration* to enable/disable this functionality. This is to let IDI troubleshooters run rating as it would prior to the change in case there are any issues with it and determine whether or not to deploy a hotfix.
OnlineBill	FR 2871	**Additional transactions in OnlineBill use the PGA APIs**: ▪ UpdatePaymentAccount - occurs in OnlineBill when users access the *Manage Payment Accounts* menu option and make changes to their saved accounts. ▪ Void - only used in error handling code, not available for users.

Document Storage	N/A	**New Features & Enhancements:** • Updates to enhance IDI's monitoring and logging capabilities for systems **Resolved Known Issues**: • Updated the API environment check to be case-insensitive (PR 82504). • Resolved display issue in Chrome where icons displayed as ellipses.
Communications	N/A	**New Features & Enhancements:** • Added new ReceivingAddressLocalPart property to Message Created and Message Modified triggers..
Workflow	N/A	**New Features & Enhancements:** • System-defined Smart Data for Workflow Instance ID and WorkItemInstanceID. This is only applicable for the Workflow Definitions and Instances. It is not applicable for Triggers.
Payment Gateway Application	FRs 2882 & 2883	**New Features and Enhancements:** • FR 2882 – Make Generic JavaScript, i.e. Non-Angular, an available option for consuming the PGA supports changes made to OnlineBill 18.6 Make Payment page • FR 2883 – Update PGA API to support Credit, Refund, and RemovePaymentAccount

2 Customer Care Web Module

2.1 OMNISEARCH ENHANCEMENTS

The Customer Care OmniSearch supports searching on Services and Contacts.

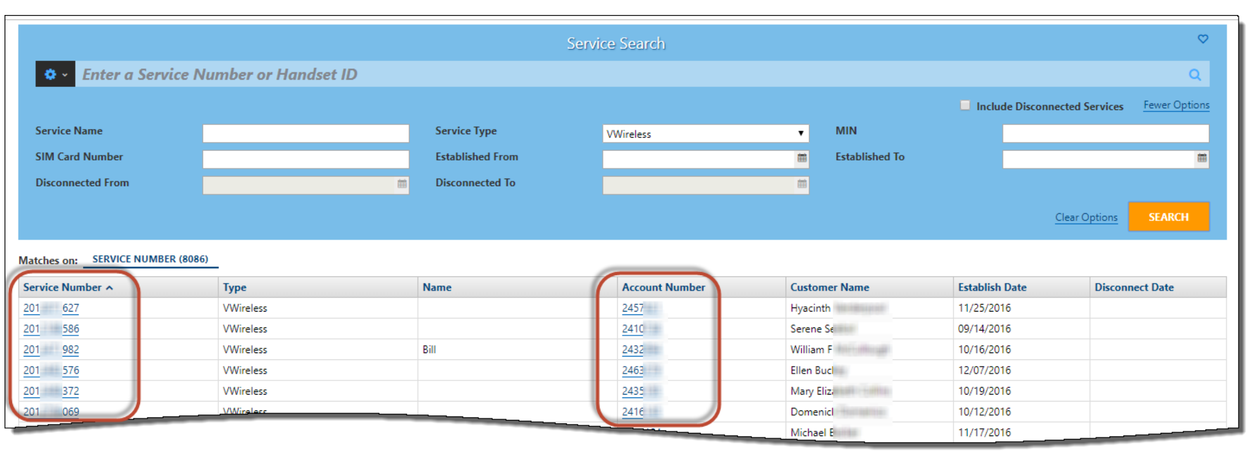


2.1.1 SERVICE SEARCH

Searches using the main search box (Service Number or Handset ID) are exact match. Search by Handset ID will search on both the Serial Number and the Alternate Serial Number properties. If the length of the search criteria entered is 15, the handset search results will include matches on the first 14 as well as the full 15 digits (to account for numbers that are 14 digits plus a calculated check digit).

When searching with **More Options**, the SIM Card Number and MIN are also exact match. Disconnected services are excluded by default, but you may include disconnected services by checking the **Include Disconnected Services** option. Doing this enables the Disconnected From/To search fields.

Search results are displayed in the grid, with links to the Service and Account for each row:

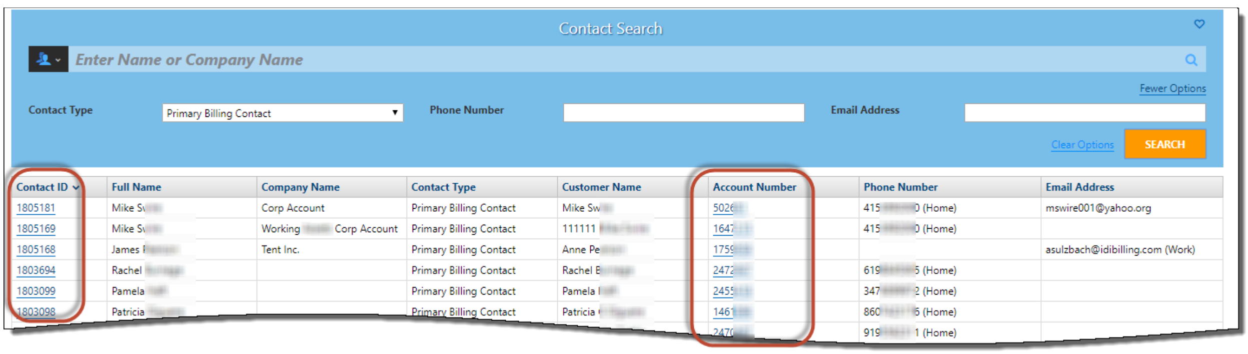


2.1.2 CONTACT SEARCH

Searches using the main search box (Name or Company Name) are done as wild-card searches, and results will include partial matches on both Full Name and Company Name.

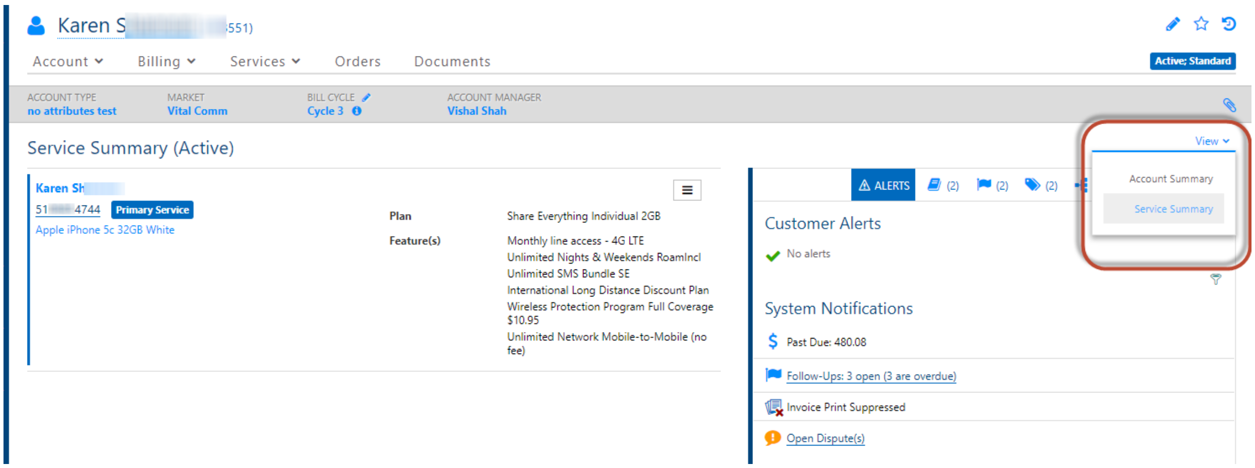
More Options lets you search by contact type, phone number and email address. Search results by Phone Number and Email Address are exact match only.

Search results are displayed in the grid, with links to the Contact and Account for each row



2.2 SERVICE SUMMARY VIEW

The Customer Summary provides a *Service Summary* view in addition to the original *Account Summary*. These views are selectable via the **View** selector. Account Summary is the default. You can change the default via a new setting as described in *Setup*.



On the Service Summary view, a record is displayed for each active service. The Primary Service on the account is displayed first, and remaining services are displayed by Service Number. Each service record contains the following elements:

- Service Name: Name configured for the service. If no name is configured, the name of the service contact is used.
- Service Badges: A badge is displayed when the service is
  - Primary Service
  - Hot-lined
  - Suspended
- Service Number: A link that takes you to the Service Detail page for the service.
- Handset: If a handset is assigned to the service, the handset name is displayed.
- Contract: If the service has an active contract, the following information is displayed:
  - Contract description
  - Duration
  - Start Date
  - End Date
- Plan: Displays the catalog item on the service associated to the Catalog Group named *Plans*. This is the same mechanism already used in CostGuard Client and Customer Care to display which SKU is considered the service's Plan.
- Features: Displays any catalog items associated with the Catalog Group configured in the Feature SKU configuration (see *Setup* below).
- Quicklinks are available by clicking at the top right for each service.

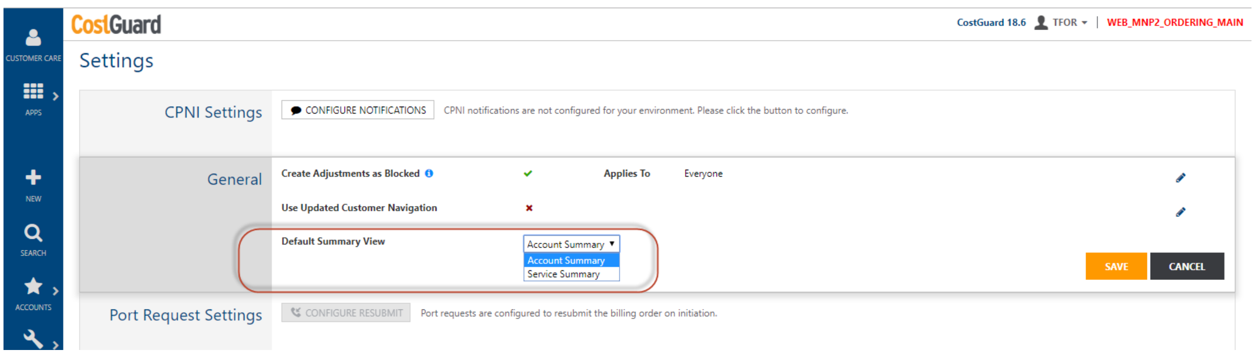
Note: The Service Summary does not list disconnected Services. You can still see those on the Services and Features page.

2.2.1 SETUP

New settings have been added in Customer Care that affect the Service Summary view. *Manage Configurations* permission is required to update these settings.

Default Summary View

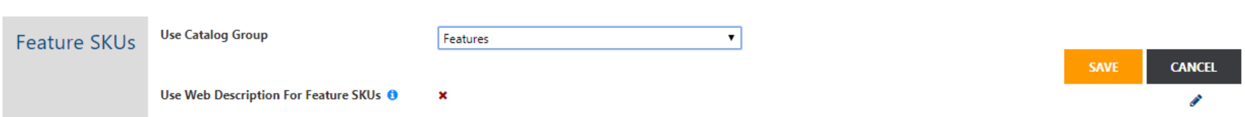
You can select the default view via a new General Setting – **Default Summary View**. Clicking the associated Edit (pencil) icon enables the drop down menu for selecting **Account Summary** or **Service Summary**. **Account Summary** is the default selection.



Feature SKU Configuration

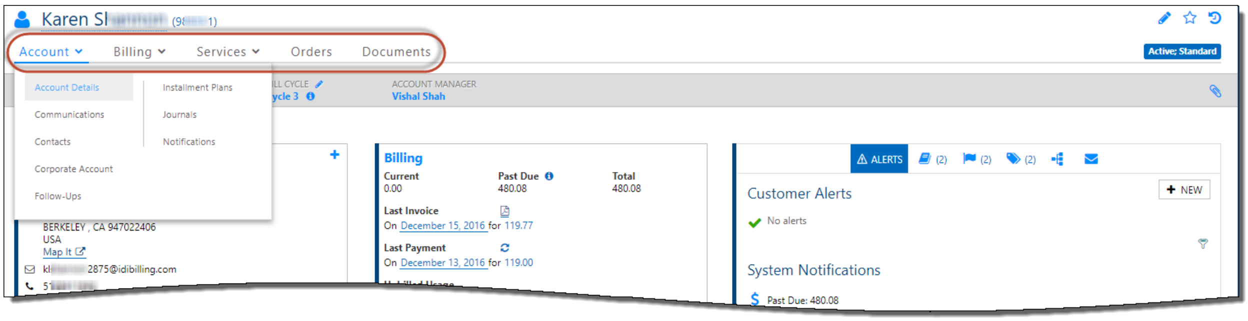
A new section has been added under **MANAGE** > **Settings** called *Feature SKUs*. These settings affect the display of features on the new Service Summary view as well as the Services and Features page and Service Detail page:

- **Use Catalog Group** - This controls the Product Catalog group that determines what features to display when displaying Feature SKUs. This lets you limit the Feature display to items of importance to you. SKUs used for administrative or behind the scenes purposes (e.g. provisioning products) can be filtered out. This setting defaults to **Features** which selects all catalog groups (unfiltered list).
- **Use Web Description for Feature SKUs** - When this setting is enabled, Feature SKUs listed on a service display the configured Web Name for the product. If the Web Name is not configured, it displays the Alternate Invoice Description. If neither is configured, it displays the Catalog Description. This setting defaults to **Off**. When this setting is Off, the Catalog Description is used.



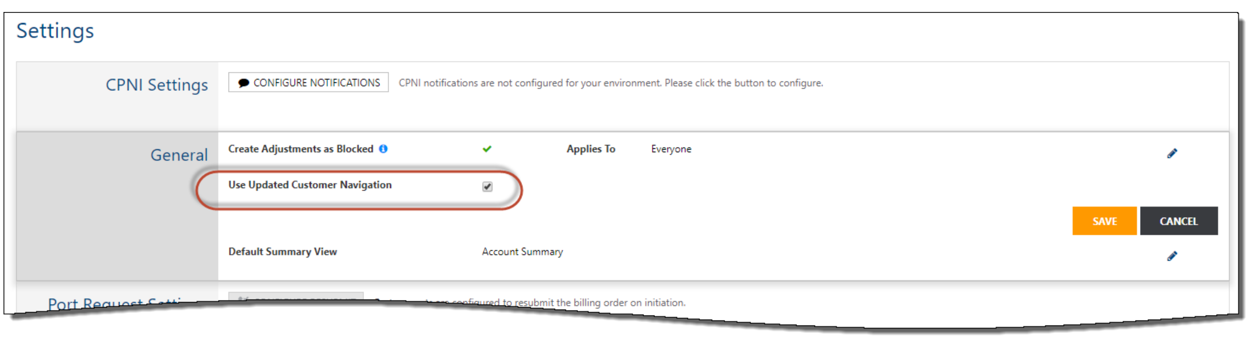
2.3 IMPROVED NAVIGATION

A new General Setting called **Use Updated Customer Navigation** lets you replace the original multi-colored drop-down menu for navigation with a static menu that is directly available at all times.



The new menu reduces the number of clicks needed to navigate between pages on an account. Hovering over the menu shows the menu items. The menu contents are the same as the original multi-colored menus. Some restyling of the page header has been done to make room for the static menu.

To use the new navigation menus, choose **MANAGE** > **Settings** and then click the associated Edit (pencil) icon to enable and select the **Use Updated Customer Navigation** setting. This setting is unselected by default (original mult-colored drop-down menu is the default view).



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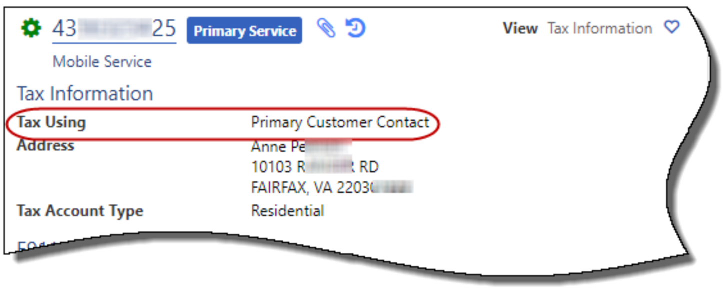
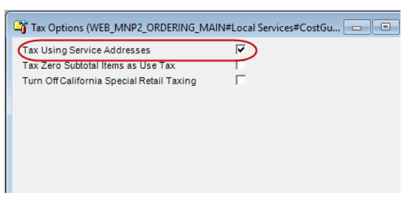
2.4 ABILITY TO EDIT *TAX USING* PROPERTY ON A SERVICE

The *Tax Using* property can now be edited on a service in Customer Care. This field was previously read-only and could only be updated through CostGuard Client.

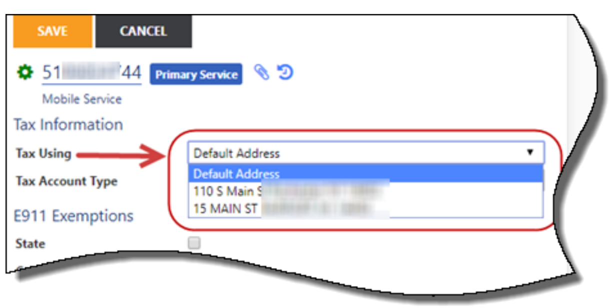
The functionality in Customer Care supports the same functionality that is provided in CostGuard Client.



If the tax options for an environment are configured to allow taxing using service address (*Tax Using Service Addresses* setting in Configuration Console), users with the *Edit Catalog Items* permission can edit the *Tax Using* property on a service. If this setting is unchecked, the *Tax Using* property cannot be edited.



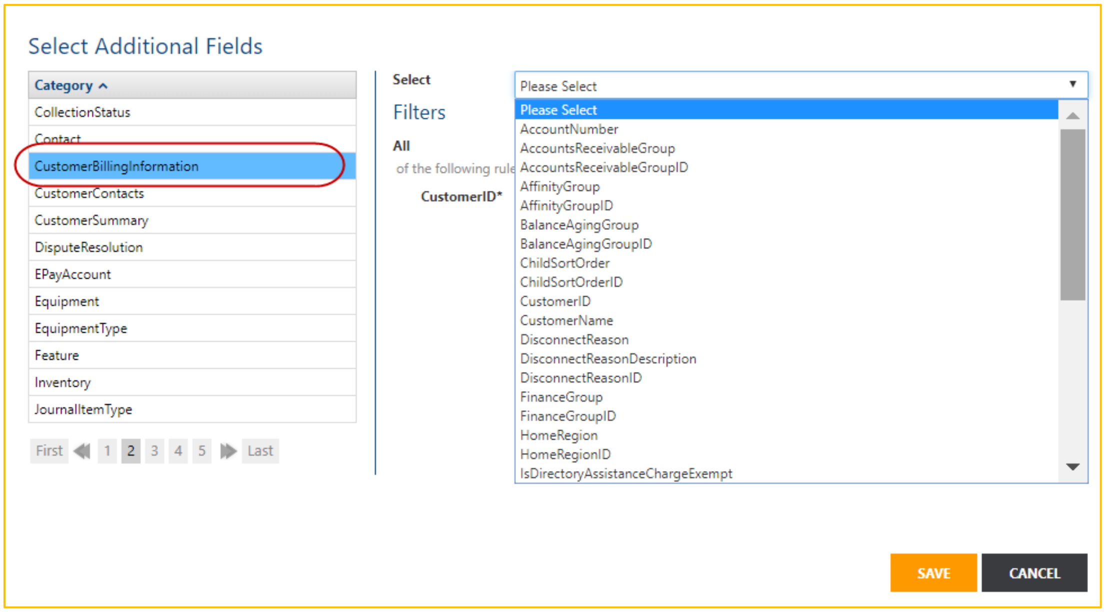
When editing the tax information in Customer Care either from the Tax Information view on the Services and Features page or *from the Service Details page, a drop-down will provide a list possible values for the Tax* Using field, including Default Address (service contact) plus any service addresses associated with the service.



While in edit mode for tax information, the Tax Jurisdictions will not be displayed unless **Is Overridden** is checked. If you update the Tax Using information and the tax jurisdiction is not overridden, the tax jurisdiction will be updated based on the new address selected and will be displayed once you click **Save**.

2.5 NEW DATA LOOKUP FOR CUSTOMER BILLING INFORMATION

A new data lookup is available for customer billing information. The *CustomerBillingInformation* data lookup can be used in Workflow or in Communications templates.



Using CustomerID, this data look-up provides access to the following properties on an account:

AccountNumber
AccountsReceivableGroup
AccountsReceivableGroupID
AffinityGroup
AffinityGroupID
BalanceAgingGroup
BalanceAgingGroupID
ChildSortOrder
ChildSortOrderID
CustomerID
CustomerName
DisconnectReason
DisconnectReasonDescription
DisconnectReasonID
FinanceGroup
FinanceGroupID
HomeRegion
HomeRegionID
IsDirectoryAssistanceChargeExempt
IsDisabled
IsFinanceChargeExempt
IsHearingImpaired
IsLifeline
IsSpeechImpaired
IsVisuallyImpaired
PullInvoice
Region
RegionID
ReportGroup
ReportGroupID
SuppressInvoicePrint
SuspendReason
SuspendReasonDescription
SuspendReasonID
UsageRoundingOption
UsageRoundingOptionID
UsesTTY

3 Tickets - Ability to Close or Modify a Ticket by Email Response

A new *Modify Ticket* action in Workflow supports closing a ticket or modifying certain ticket properties by responding to an email sent by the ticket. This action works with a Communications template of type *Ticket Template*, where the template contains a Reply/Mail To link within the body of the template.

The subject ticket (to be closed or modified) sends an email using the aforementioned template. The email can be sent manually via the Communication tab in the ticket's InfoCenter, or you can set up a trigger to automatically send the email based on a specified condition (for example, *Ticket Resolved*).

Once the email is sent, the recipient can then respond by clicking the link in the email to send a response email that performs the Modify Ticket action.

3.1 SETUP

3.1.1 COMMUNICATIONS TEMPLATE

In the Communications module, create a template for the subject ticket to use when it sends an email. The template name and description can be anything.

- Type = **Tickets Template**
- The body must contain a **mailto** link (inserted by clicking the icon). This is the link email recipients will click to respond and trigger the *Modify Trigger* action.

  The following is an example of the URL text for a *mail to* link, and can be used as a starting point. The items in bold are static and are required:

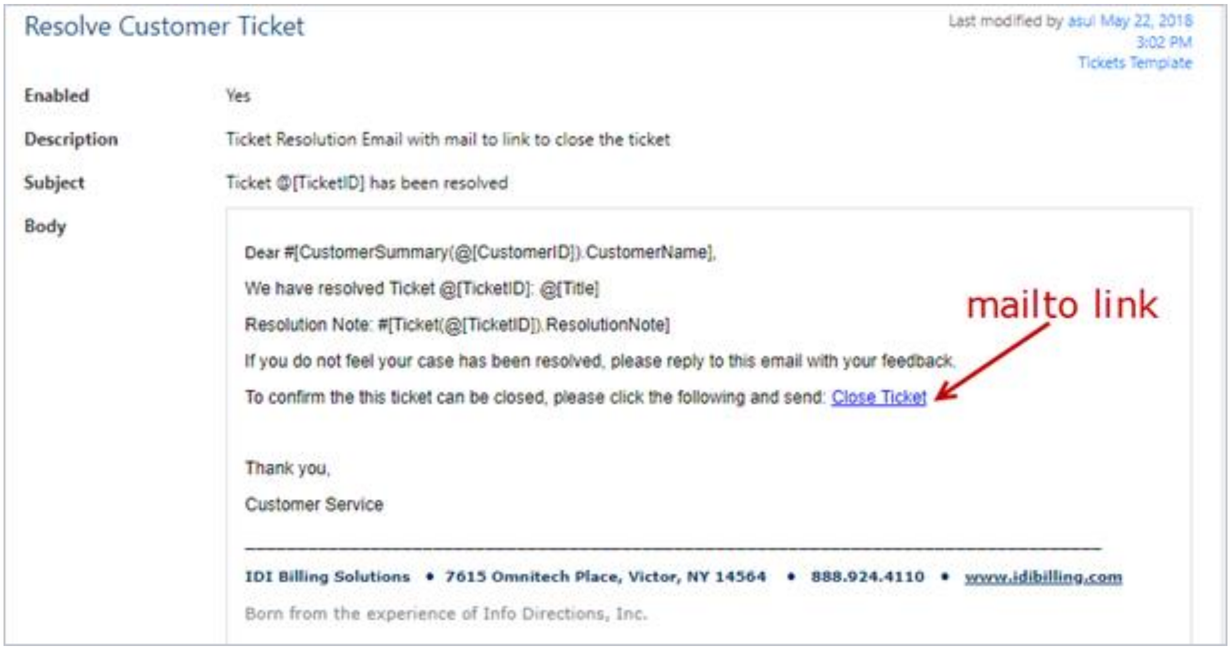
  mailto: CloseTicket*+e=web_mnp2_ordering_main***+t=ticket+i=@[TicketID]**@*holla.onlineholla.com***?subject=**Close%20Ticket%20Request**&body=*****Close%20Ticket%20Request%20for%20#[CustomerSummary(@[CustomerID]).CustomerName]***

Notes:

- **Close Ticket:** this can be any text, but must match the To Email Address for the Modify Ticket action (as configured in 3.1.3). This is the local part of the 'To' address populated when the user clicks the link.
- **+e=web_mnp2_ordering_main:** for non-production environments, the '+e' is required in the 'To' email address/local part, followed by the environment name. In this example, the environment is web_mnp2_ordering_main. The "+e=" parameter should be omitted for production.
- **holla.onlineholla.com**: subdomain and domain configured for the company. Update to match the environment you are working in.
- **Close%20Ticket%20Request**: This is the email subject. In this case: *Close Ticket Request*. This can be changed.

- ******Close%20Ticket%20Request%20for%20#[CustomerSummary(@[CustomerID]).CustomerName]****** : This is the body of the email. In this case: ****Close Ticket Request for <Customer Name>****. This can be changed.
  - **%20**: In the above syntax, '%20' inserts a space in the email.

Example template:



Resolve Customer Ticket

Last modified by asul May 22, 2018 3:02 PM
Tickets Template

Enabled	Yes
Description	Ticket Resolution Email with mail to link to close the ticket
Subject	Ticket @[TicketID] has been resolved
Body	Dear #[CustomerSummary(@[CustomerID]).CustomerName], We have resolved Ticket @[TicketID]: @[Title] Resolution Note: #[Ticket(@[TicketID]).ResolutionNote] If you do not feel your case has been resolved, please reply to this email with your feedback. To confirm the this ticket can be closed, please click the following and send: Close Ticket Thank you, Customer Service IDI Billing Solutions • 7615 Omnitech Place, Victor, NY 14564 • 888.924.4110 • www.idibilling.com Born from the experience of Info Directions, Inc.

3.1.2 SEND EMAIL SETUP

As mentioned above, you can either send the email from the ticket manually, or set up a trigger to auto-send based on a specified condition.

<u>Auto Send Email</u>

Using a trigger to send the email using your template would replace the manual step of sending the email, based on criteria defined in the trigger.

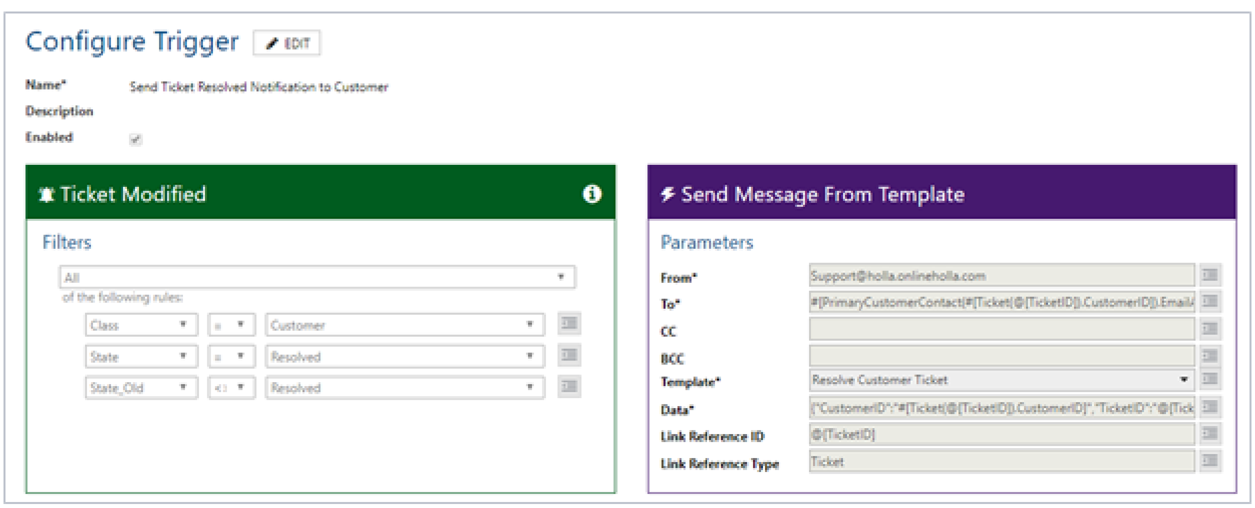
The following is an example of a trigger that will send an email when a ticket is updated from a non-resolved state to a resolved state. The trigger will send an email to the primary customer contact and the contact on the ticket, using the *Resolve Customer Ticket* template (configured above in 3.1.1).

The *Ticket Modified* event trigger is used with the *Send Message from Template* action. Using *Class* as a filter on the left side (trigger configuration) isolates the trigger to customer tickets (versus equipment, global or email tickets). Also on the left side, set up the condition to send the email.

In this example, the *To* on the right side (action configuration), uses the email addresses of the primary customer contact and the contact associated to the ticket (separated by comma) using data lookups.
To:
#[PrimaryCustomerContact(#[Ticket(@[TicketID]).CustomerID]).EmailAddress1],#[Contact(@[ContactID]).EmailAddress1]

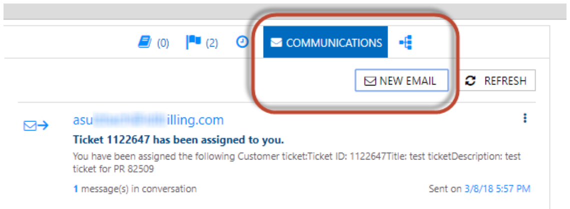
The template requires the following data be passed: Customer ID and the Ticket ID
Data: {"CustomerID":"#[Ticket(@[TicketID]).CustomerID]","TicketID":"@[TicketID]"}

The values for *To* and *Data* can be copied/pasted into your trigger.

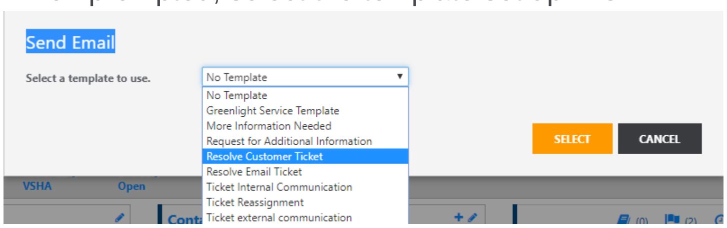


Manually Send Email to Customer Associated to Ticket

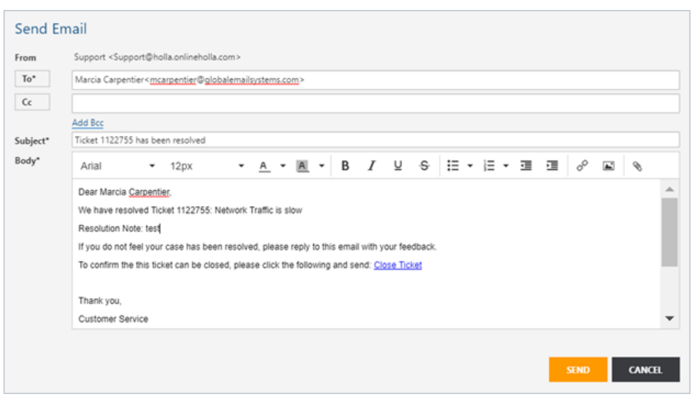
Use the New Email functionality in the InfoCenter Communications tab to send an email to the customer contact associated to the ticket.



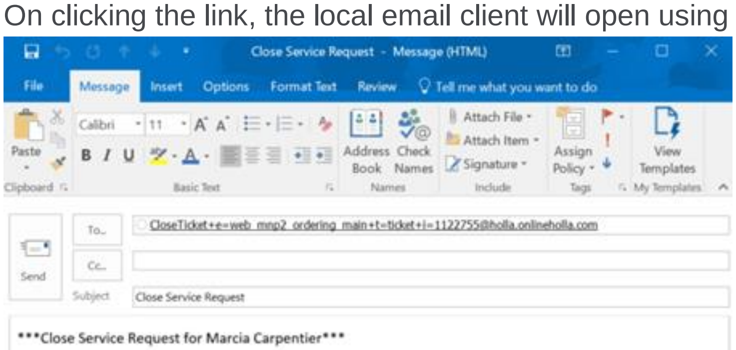
When prompted, select the template set up in 3.1.1.



The recipient can then use the link to send an email using their local mail client, which will in turn close the ticket.



On clicking the link, the local email client will open using the information in the link.

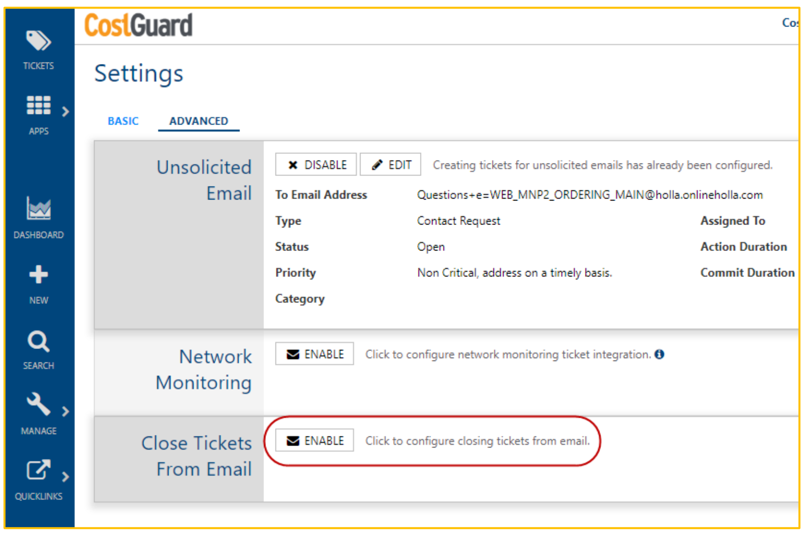


3.1.3 MODIFY TICKET ACTION SETUP

If your intention is to close a ticket, you can use a new Ticket setting to auto-create the trigger and associated Modify Trigger action. For any other modification, use the Create Trigger/Action functionality directly in Workflow.

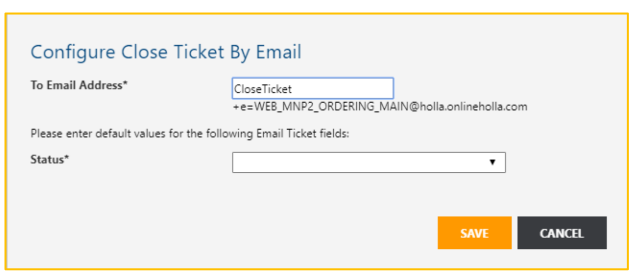
<u>Using Close Tickets From Email Setting</u>

Under **MANAGE > Settings**, on the **Advanced** tab, a new option is available to close tickets from an email. Enabling this setting creates a trigger that uses the new *Modify Ticket* action. Once enabled, disabling will delete the trigger.



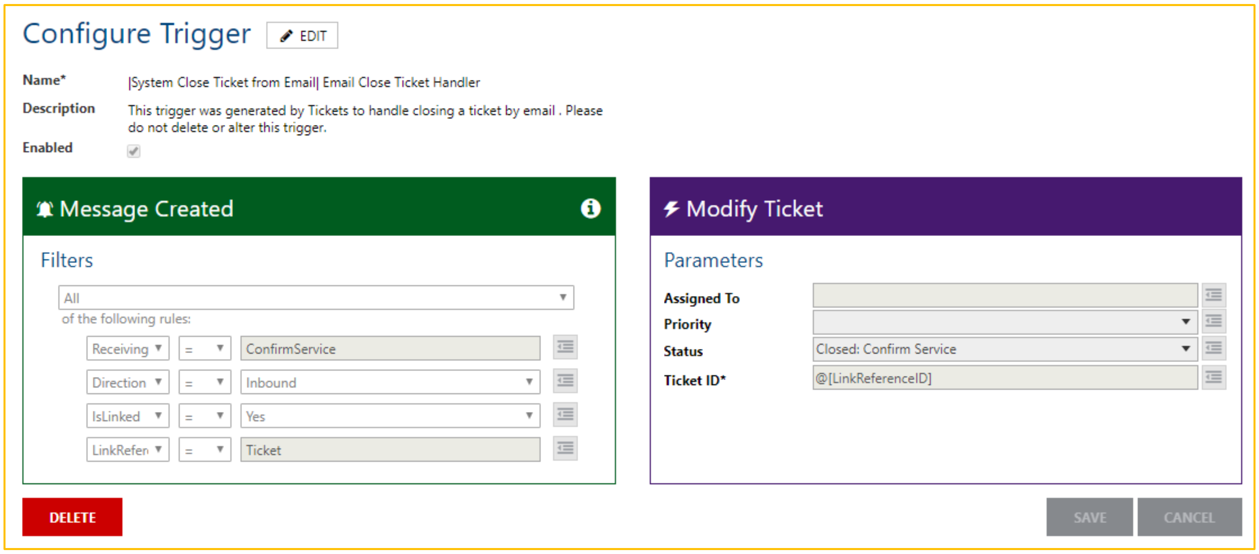
When you enable this setting, you'll be prompted for a *To Email Address* and a *Status*.

- **To Email Address**: defaults to *CloseTicket*, but can be changed to any unique value. This will be used as the local part of the email address for incoming emails that are intended to close a ticket. This should not be set up to match the local address of any entries in Mailbox Configuration or the local address for any specific ticket types.
- **Status**: Only statuses affiliated with the state of *Closed* can be selected



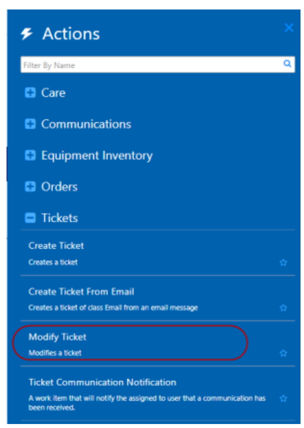
The portion of the *To* email address after @ is derived and cannot be entered by the user.

Clicking save creates the following trigger in Workflow:



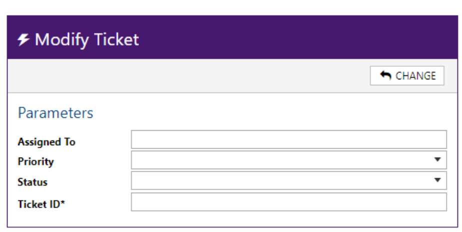
Manual Setup

The Modify Ticket Action is available in Workflow under the *Tickets* label.



Enter the applicable ticket ID (ticket to be modified), and use the other fields to modify one or more of the following parameters:

- Assigned To
- Priority
- Status: if you select a status that is affiliated with the *Closed* state, the action will update *and close* the ticket



4 Ability to Handle USOCs up to 50 Characters

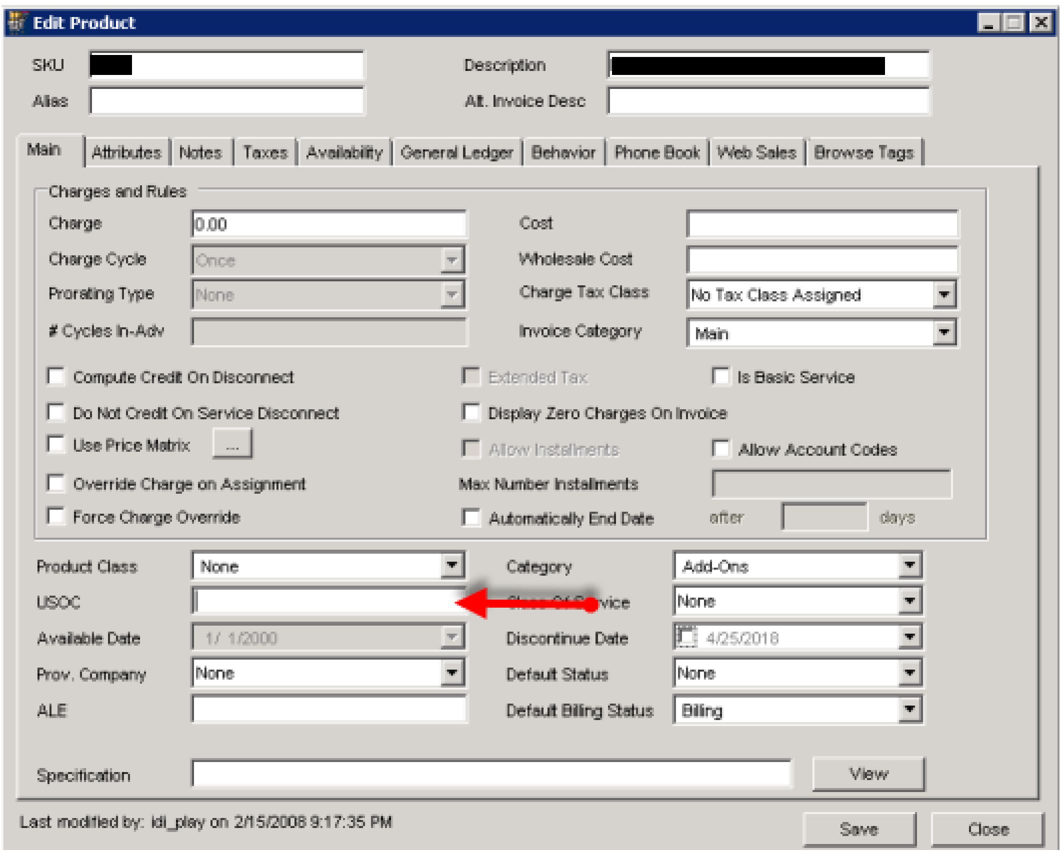
4.1 PRODUCT CATALOG

The USOC field in the following of Product Catalog forms now support up to 50 characters:

- Package
- Pricing Plan
- Product
- Service

There are no other changes to these forms.

Example:



4.2 CUSTOMER MANAGEMENT

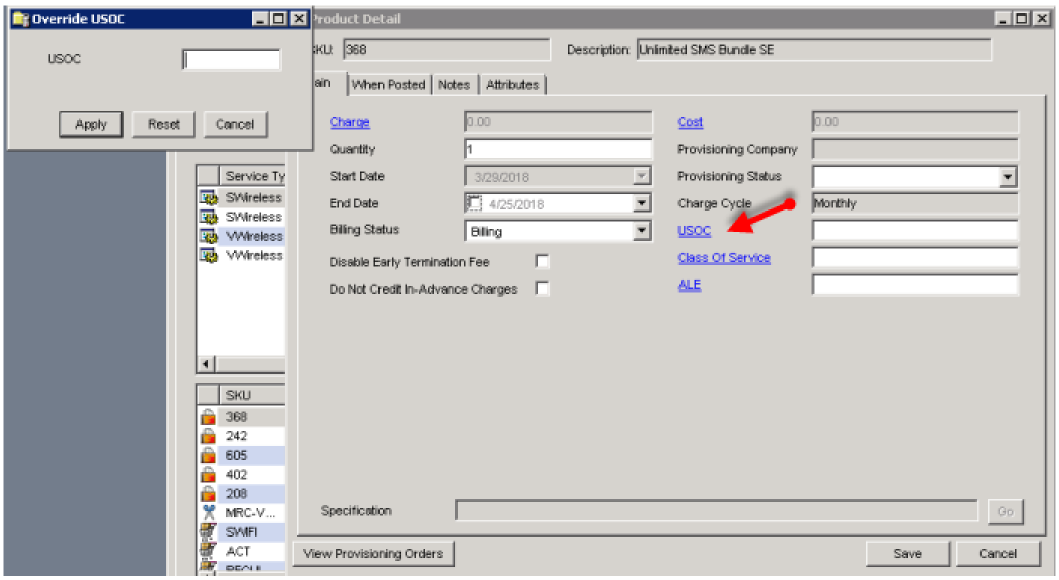
When editing products, pricing plans, or packages on a service, in the Override USOC pop-up link:

- Up to 50 characters will be supported
- The Override USOC field will show up to 20 characters

This applies to the following forms:

- Pricing Plan Detail
- Product Detail

Example:

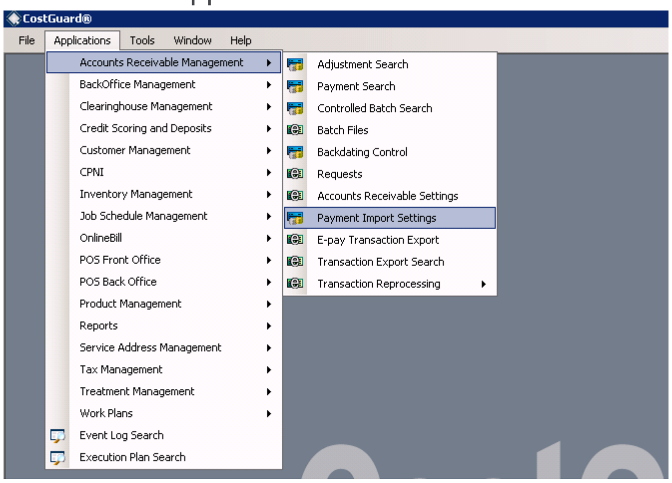


5 Disallowing Payments to Non-Invoice Responsible Accounts

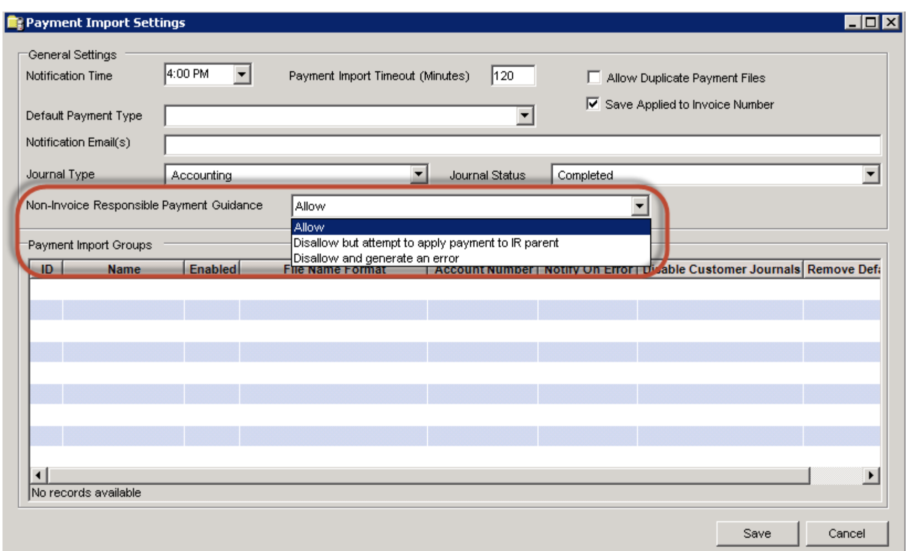
CostGuard has a new setting to control how payments targeted for non-invoice responsible (NIR) accounts are handled. Prior to this change, payments have been allowed without restriction on NIR accounts. With recent corporate rollup improvements to CostGuard, disallowing such payments may help customers avoid potential billing issues.

5.1 SETUP

A new drop down menu to configure NIR payment handling is available in the CostGuard Client under Applications > Accounts Receivable Management . Payment Import Settings.



This displays the Payment Import Settings form. The new setting is labeled **Non-Invoice Responsible Payment Guidance**.



- **Allow** - Payments can be applied to NIR accounts. This is the default option to retain compatibility with previous versions.
- **Disallow and Generate an Error** - Import file will write the following error message to the import log: *Non-Invoice Responsible payment guidance setting does not allow payments to non-invoice responsible accounts*.
- **Disallow but attempt to apply payment to IR parent** - Payments will be applied to current IR parent. If an invoice responsible parent cannot be located an error will be generated.

5.2 PAYMENT PROCESSING

Payments targeting NIR accounts will now be handled according to the new setting. This setting applies to the Payment Import GUI in CostGuard Client and to the Background Process Payment Import.

5.2.1 ERROR HANDLING

If an error occurs during the background process payment import, the remaining records in the file will be loaded anyway.

If an error occurs during the GUI payment import, the entire file will fail and none of the records will be imported.

5.2.2 EFFECT OF INACTIVE SETTING WHEN APPLYING PAYMENTS TO IR PARENTS

First, the NIR Payment guidance logic determines the account to be targeted by looking at the following fields in this order:

- Invoice Number
- then Customer Acct Number
- then Service Number

Once the account is determined, the new NIR payment guidance setting is applied. Finally, the Inactive Account setting (Accounts Receivable Settings/Allow Payments and Adjustments on Inactive Accounts) is applied:

- If the Inactive Account setting is disabled, the NIR payment guidance logic will traverse up the parent chain until it finds the nearest active Invoice-responsible account.
- If the Inactive Account setting is enabled, the payment will be applied to the nearest Invoice-responsible parent account, even if it is inactive.
- In either case, when no appropriate parent account is found an error message is generated.