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Core Release Bulletin

CostGuard Solution 18.11 Release

November 2018

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Table of Contents

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 use 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.

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1 Release Summary

1.1 CHANGE ORDERS/ENHANCEMENTS

The following change orders and other enhancements are included in this release.

<table>
<tr><th>Functional Area</th><th>AR/FR</th><th>Description</th></tr>
<tr><td rowspan="3">Customer Care</td><td>FR 2950</td><td>Calculate and display contract early termination fee on Service Summary view - Users can select a date to calculate and display the resulting penalty.</td></tr>
<tr><td>FR 2976</td><td>Send/resubmit notifications:
• Requires new permission
• Limited to account level data sources</td></tr>
<tr><td>FR 2972</td><td>Miscellaneous enhancements:
• Display Service SKU in service details information.
• Is Retained property on Create Journal action lets you specify that the Journals be listed in the InfoCenter.
• Update Usage Balance Summary Headers when page is filtered to a Service Number - On clicking the header on the Usage Balance Summary, if the page is filtered to a specific service number, the Usage Balance page is opened filtered to that service number.</td></tr>
<tr><td>Tickets</td><td>FR 2972</td><td>Ability to assign and change status in one dialog improves usability.</td></tr>
<tr><td rowspan="2">Orders</td><td>AR 8186</td><td>Recurring charge indicator when selecting products on an order:
As you add or edit products on an order, recurring charge products (as configured in Product Catalog) will have an icon to indicate this. Hovering over the icon will provide pop-up text to indicate the type of recurring charge (weekly, monthly, annually, etc…) as configured in the Catalog.</td></tr>
<tr><td>AR 8188</td><td>New setting lets you choose whether to view Product SKU, Product Description or both when selecting Products for an order - Defaults to Description. Only applies to product selection (when items are not in the cart).</td></tr>
<tr><td>Payment Gateway Application</td><td>FR 2967</td><td>Styling enhancement for Export hyperlink to address the condition when there is a full (10) or almost full (7 or more) list of transactions on the single page.</td></tr>
<tr><td>Audit Log</td><td>FR 2972</td><td>Ability to export search results</td></tr>
<tr><td>Corporate Accounts</td><td>FR 2970</td><td>Changing Market on a Corporate root account - applies to Customer Care and CostGuard Client. Users can change market for corporate structure without needing to disassemble and then reassemble it. Market cannot be changed on a child account and changing it on a parent propagates to all accounts in the tree.</td></tr>
<tr><td>File processing</td><td>AR 8168</td><td>Batch File Import includes Invoice category ID as an optional field at the end of the file.</td></tr>
<tr><td>Wholesale Billing</td><td>AR 8218</td><td>Display Cost and Wholesale Cost on Usage Summary and Usage Details pages:
Customer Care
• Cost (Carrier Amount) and Wholesale Cost (CP Amount) are included on Usage Details and Usage Summary grids. These fields will only display for users that have the Show Cost permission.
CostGuard Client:
• Cost and Wholesale Cost are displayed on Usage Type and Wireline Usage Summaries, and Usage Details grids when users choose to display all columns (no new permission required).</td></tr>
</table>

1.2 RESOLVED KNOWN ISSUES

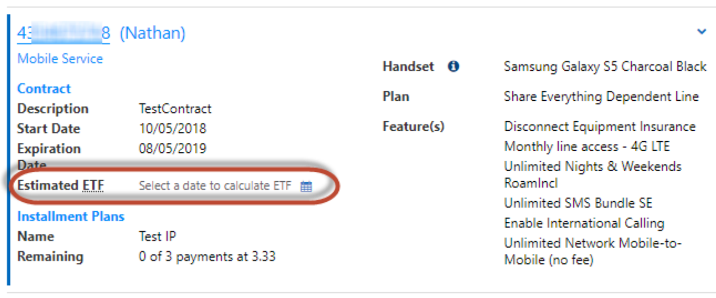
The following known issues have been resolved in this release.

Functional Area	PR	Description
Customer Care	NA	Fixed under FR 2972: • CPNI Verification when viewing Audit log on a verified account – On initially accessing a customer, alerts, CPNI, and Forced Journals will display (if configured). The system keeps track so those actions are not repeated on refreshes or opening the same customer in a new window. • Quicklinks not viewable by excluded users – This applies to all apps that use quicklinks. Users excluded from viewing a Quicklink are no longer able to see the Quicklink by hovering over the blank area where the Quicklink would be displayed (if user was not excluded). • Retain formatting for display of Switch Query response: Preserve white space and ensure overflow scrolls in a bounded box. • Fix improper display of Clone Customer Icon – Icon no longer dusplays for users that don't have *Create Account* permission. • Invoice display – Users can now select any historical invoice from the drop down menu (not limited to past 12 months). • Contract Exp Date and Duration are not Showing Override - When the contract duration has been overridden, the displayed duration and expiration date now reflect the override when applicable.
Audit Log	N/A	• When changing environments, users are now routed back to the Audit Log application rather than *My Account* in the Security application. • Resolved display issue when using Chrome, where icons displayed as ellipses.
Document Storage	82776	Resolved issue where documents with a comma in the name cannot be downloaded.
RateBill	82727	Fixed Usage and Parse Archive Operation to only archive CDREventHashKey after the associated CDREvents are archived
	82787	Increased length of applicable fields so that customer names that exceed 40 characters do not cause Summaries operations to fail.
Orders	82765	Cancelled and Completed Line Items were being affected by certain Billing Order Management operations. Updated the Billing Order Management web service to log state changes and fire billing order processed triggers when using SetDate at the PON level.
	82784	Updated SetStartDate, SetEndDate and SetBillingStatus BillingOrderManagement WS operations to bypass billing order line items that have a line item status of Completed or Canceled.
Tickets	82738	Creating a closed Ticket from the Ticket Action in Workflow and manually creating a closed ticket in the Tickets web app now behave the same.
Payment Gateway Application		Fixed positioning of the Export link on Search results page.
OnlineBill	82789	Modified the detail reports under View Usage to export total charges as four decimal places to fix rounding issue where Usage Detail provided to customers in OnlineBill did not match invoice.
Data Mgmt	82722	Fixed latency when trying to edit Journal Type via Admin Console.
Usage Notifications	82744	Updated Usage Notification failures to ignore cancelled requests. This fixes an issue where canceling a Ratebill Request for a full rerate breaks the usage notification.
Corporate Accounts	82796	Better error messaging in the scenario where a payment file rejects payments for NIR accounts that are IR. The error indicates the Applied to Invoice Number value was not found rather than the misleading error saying that a Customer that is actually IR is NIR.

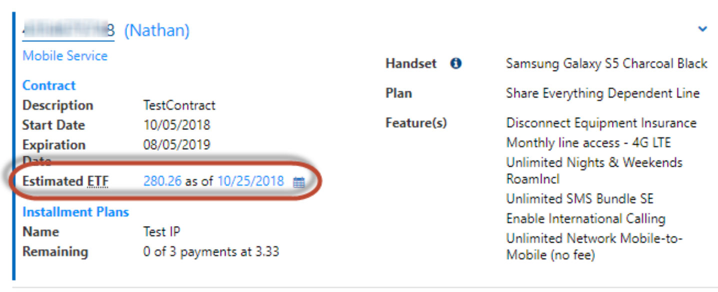
2 Customer Care

2.1 CALCULATE AND DISPLAY CONTRACT EARLY TERMINATION FEE

The Customer Summary Service Summary view provides an Early Termination Fee (ETF) calculator for contracts with a term commitment. The calculator can be used to determine the ETF for contracts with a flat fee penalty, a prorated fee penalty, or a combination of both.



Click on the calendar and pick the current date or a future date for the calculation. *Estimated ETF* will be displayed when the penalty can be estimated.



Notes:

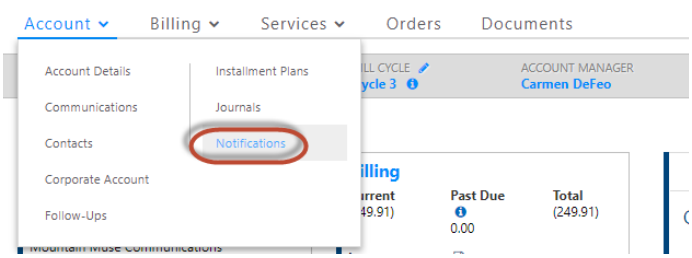
- The calculator will not be displayed under the following conditions:
  - If a contract with a Term Commitment has an MRC Multiplier fee
  - If a contract has any type of commitment other than a Term Commitment
- If a contract has multiple terms, the Estimated ETF applies the *Term commitment* only.

2.2 SENDING AND RESUBMITTING CUSTOMER NOTIFICATIONS

Customer Care lets authorized users send and resubmit notifications. The Send Notification capability is limited to sending from a template. Manual emails and sending from a report are not supported.

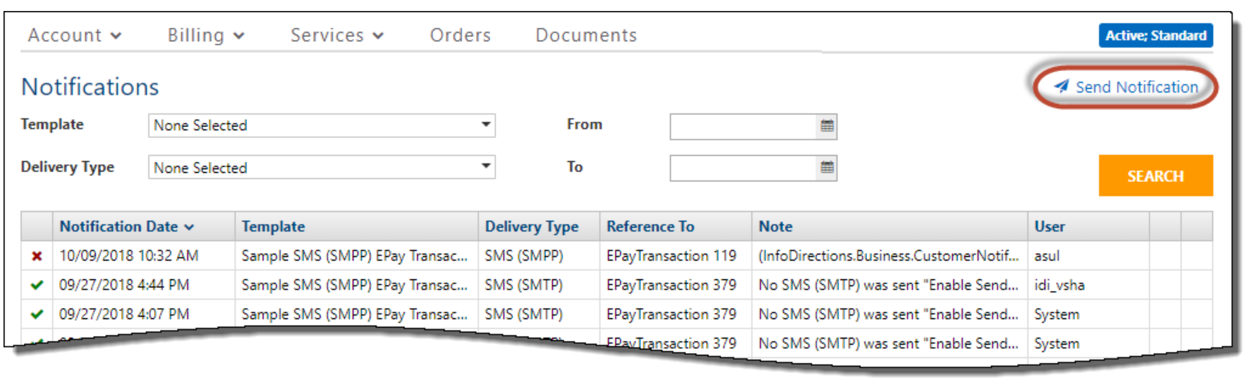
Note: This functionality requires *Send Notification* permission.

This functionality is available on the Account Notifications page (**Account** > **Notifications**).

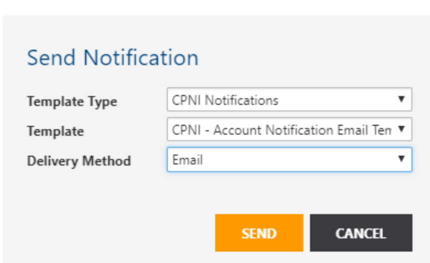


2.2.1 SENDING A NOTIFICATION

Click **Send Notification** to start the process to send a new notification.

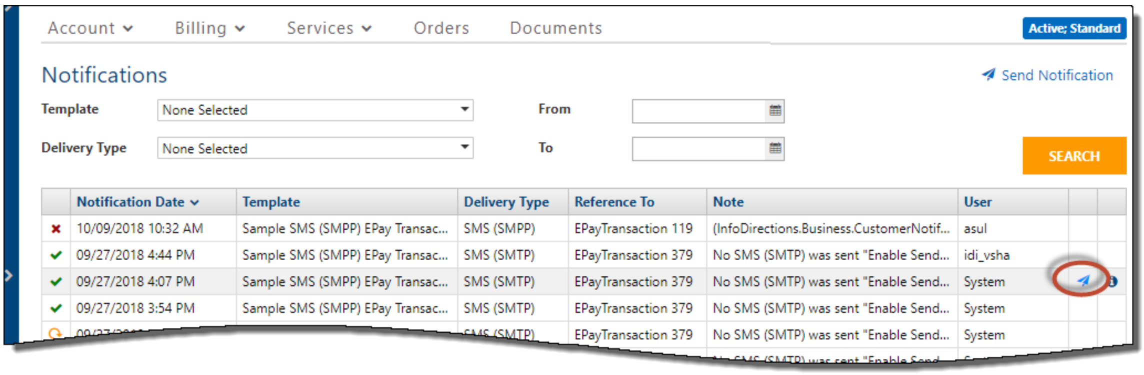


This displays a dialog that requires you to select the template type, template and delivery method. **Note**: Each parameter must be selected in the proper order (i.e. you cannot select a template, until you select the type, and you cannot select the delivery method until you select the template).



2.2.2 RESUBMITTING A NOTIFICATION

On the Notifications grid, the second column from the right provides a *Resubmit* icon when you hover over the row.

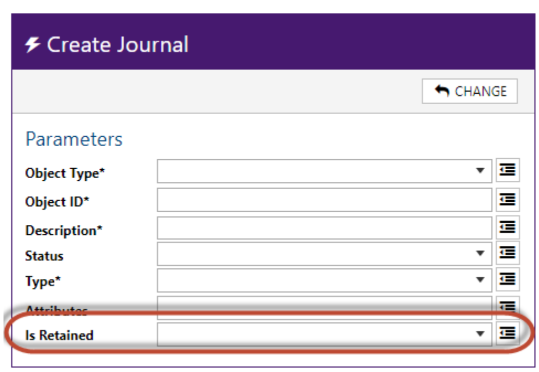


When you click this icon to resubmit the notification, a confirmation message will be displayed to let you confirm before resubmitting.

Note: When a notification is sent or resubmitted, an entry is written to the service bus to process the notification. There may be a delay for newly sent or resubmitted notifications appearing in the search results grid.

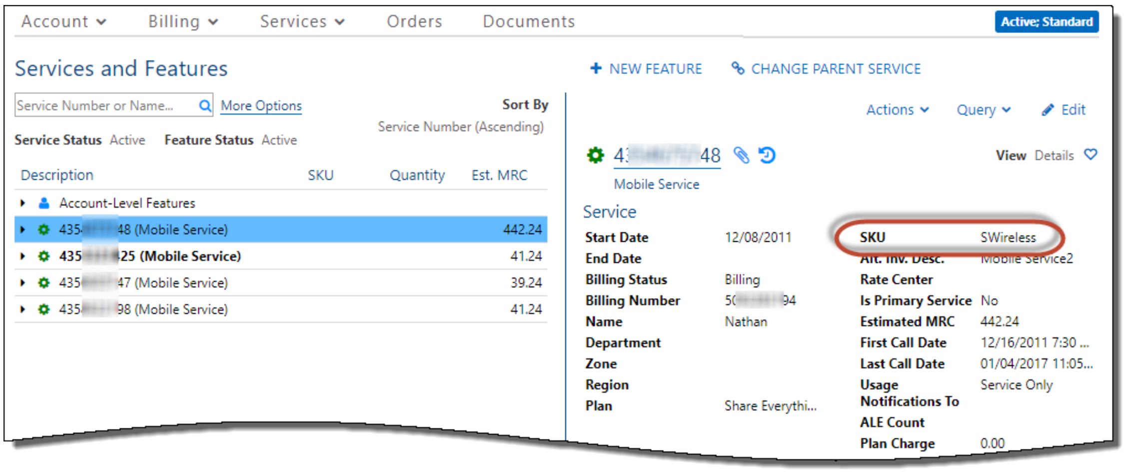
2.3 CREATE JOURNAL WORKFLOW ACTION *IS RETAINED* PROPERTY

The *Create Journal* action in Workflow provides an *Is Retained* property that, when set to **Yes**, will cause the Journal to be displayed on the Journals tab in the Customer InfoCenter.

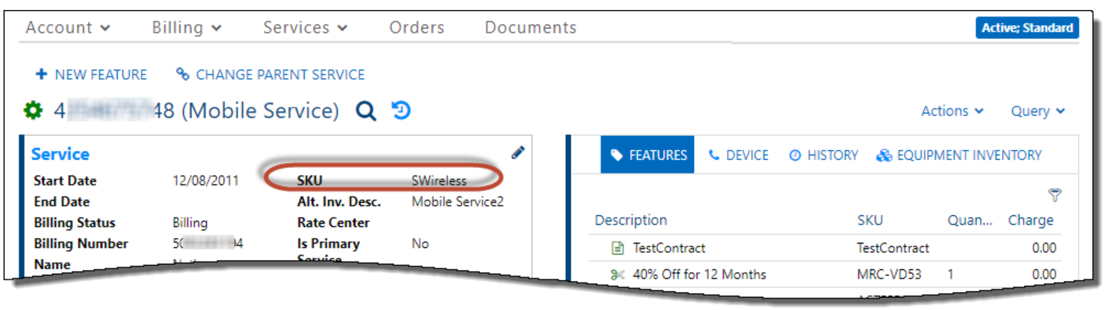


2.4 DISPLAY SERVICE SKU IN SERVICE DETAILS INFORMATION

The Service Details view on the Services and Features page includes the SKU for the selected service.



The SKU is also displayed on the Service Details page.

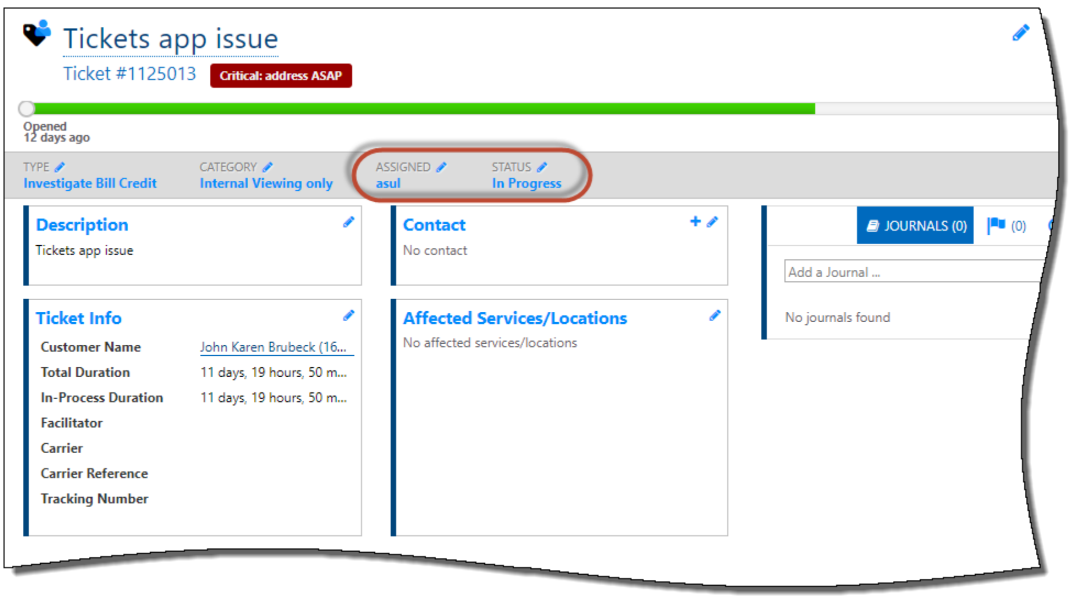


3 Tickets

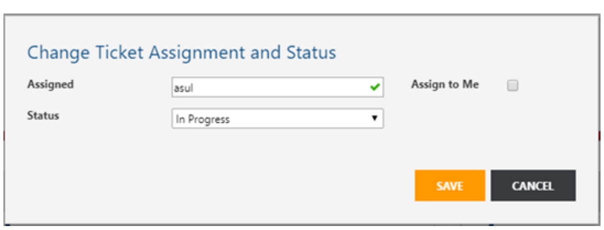
3.1 ABILITY TO EDIT ASSIGNED AND STATUS PROPERTIES IN ONE DIALOG

To improve usability, you can now change the *Assigned* and the *Status* properties on a ticket in one dialog.

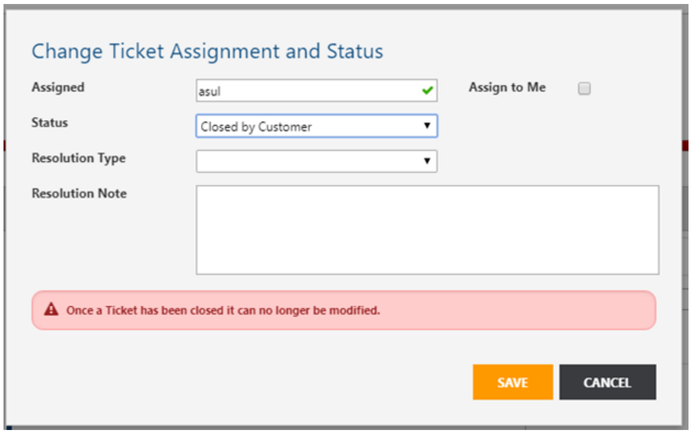
Clicking *either* pencil (edit) icon will open a dialog that lets you edit both fields.



Note: The ability to edit the Assigned and Status properties are permissioned separately. If a user only has permission to only edit one of the properties, the other property will be displayed as read-only in the dialog.



The dialog will provide additional fields when resolving or closing the ticket.

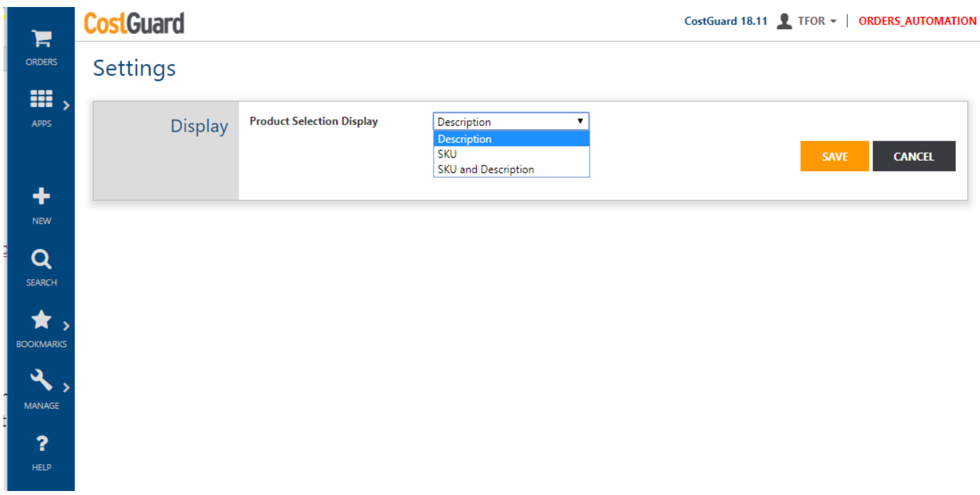


4 Orders

4.1 ABILITY TO VIEW PRODUCT SKU WHEN SELECTING PRODUCTS

A new setting lets you choose whether to view Product SKU, Product Description or both when selecting Products in the Orders web application.

The Product Selection Display setting is located under **MANAGE** > **Settings**.



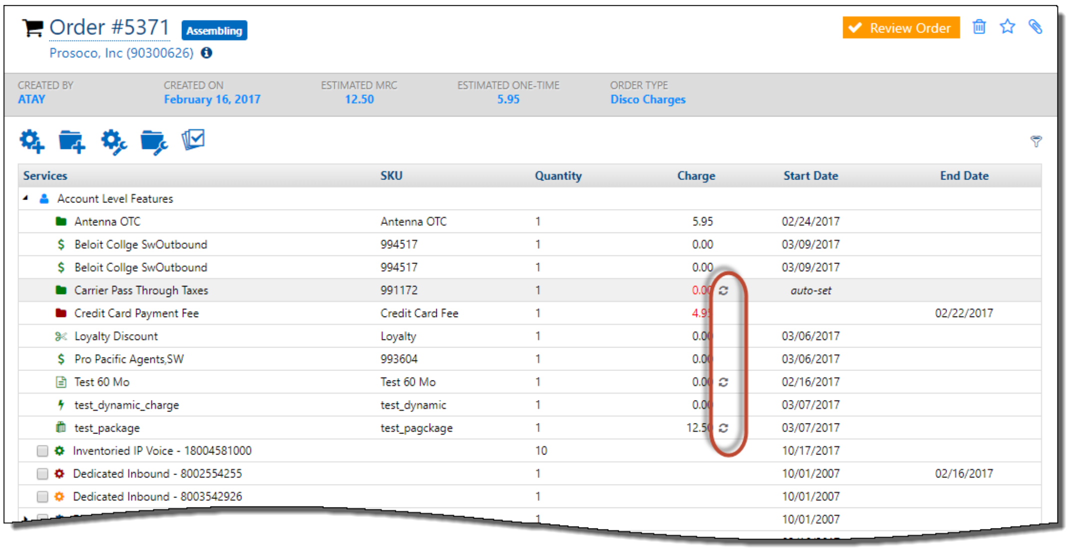
You may choose to display SKU, Description or SKU and Description. The setting defaults to Description. It only applies to product selection (when items are not in the cart).

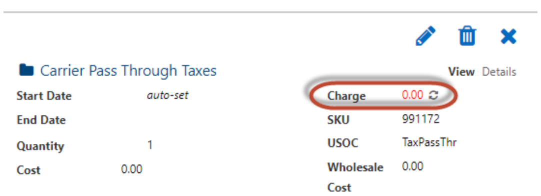
The following areas in the Orders application use the new setting:

- Add Feature to an Order:
  - Account Level Feature
  - Service Level Feature: Browse
  - Service Level Feature: Search by Description
- Add Feature to a Service:
  - Browse
  - Search by Description
- Add Service:
  - All Service Types
  - Service Types by State and Zone
  - Subservice
    - Once parent service is selected, the available service types for a sub-service are listed

4.2 RECURRING CHARGE CYCLE INDICATOR

As you add or edit products on an order, recurring charge products (as configured in Product Catalog) will have an icon to indicate recurring status. Hovering over the icon will provide pop-up text to indicate the type of recurring charge (weekly, monthly, annually, etc…) as configured in the Catalog.



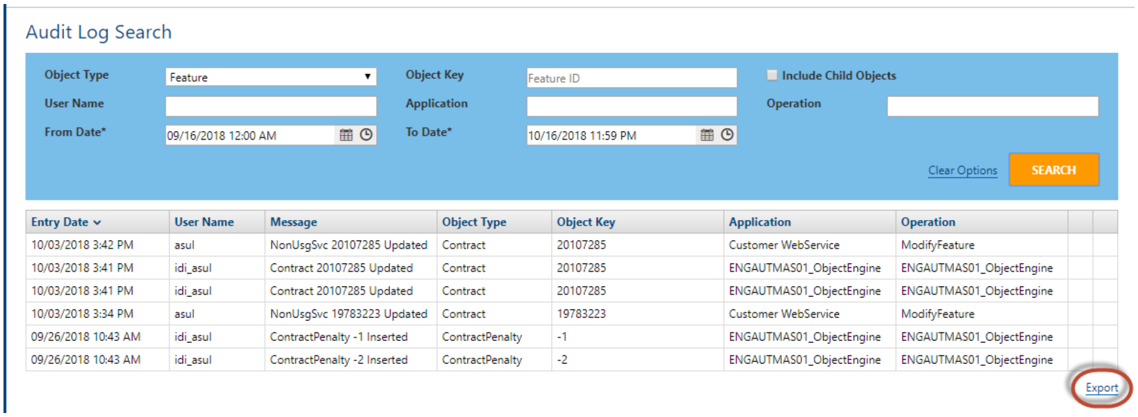


Note: If a product has no icon, it means the charge cycle is non-recurring (Once) or None as configured in the Product Catalog.

5 Audit Log Application

5.1 EXPORTING SEARCH RESULTS

The Search Results grid provides an **Export** link that lets you export the search results.

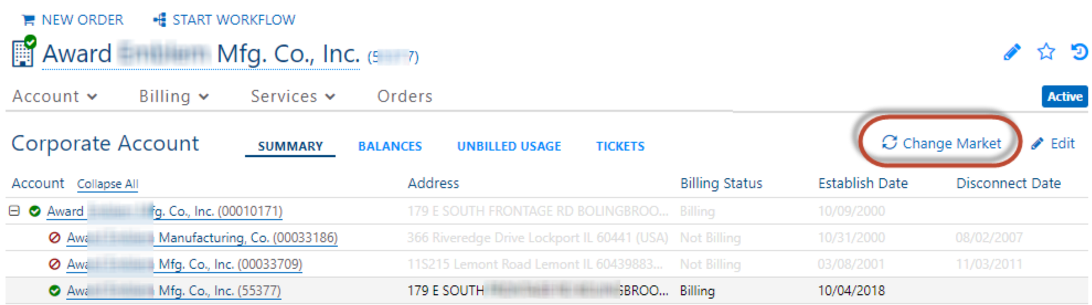


Entry Date	User Name	Message	Object Type	Object Key	Application	Operation
10/03/2018 3:42 PM	asul	NonUsgSvc 20107285 Updated	Contract	20107285	Customer WebService	ModifyFeature
10/03/2018 3:41 PM	idi_asul	Contract 20107285 Updated	Contract	20107285	ENGAUTMAS01_ObjectEngine	ENGAUTMAS01_ObjectEngine
10/03/2018 3:41 PM	idi_asul	Contract 20107285 Updated	Contract	20107285	ENGAUTMAS01_ObjectEngine	ENGAUTMAS01_ObjectEngine
10/03/2018 3:34 PM	asul	NonUsgSvc 19783223 Updated	Contract	19783223	Customer WebService	ModifyFeature
09/26/2018 10:43 AM	idi_asul	ContractPenalty -1 Inserted	ContractPenalty	-1	ENGAUTMAS01_ObjectEngine	ENGAUTMAS01_ObjectEngine
09/26/2018 10:43 AM	idi_asul	ContractPenalty -2 Inserted	ContractPenalty	-2	ENGAUTMAS01_ObjectEngine	ENGAUTMAS01_ObjectEngine

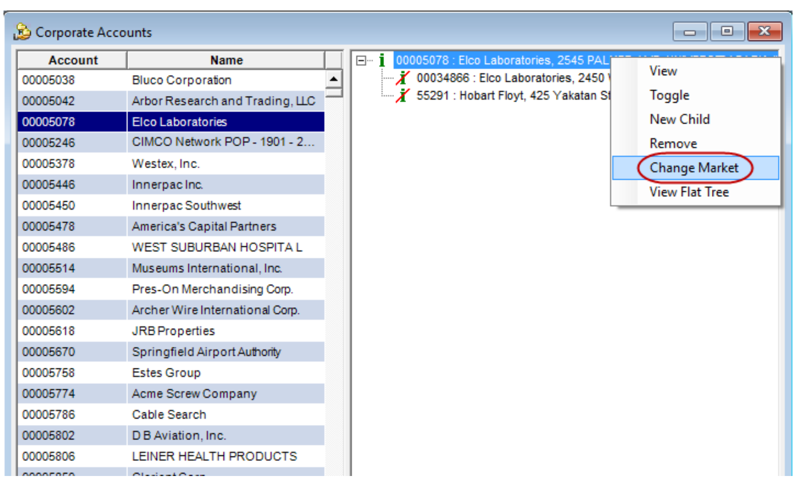
6 Changing Market on a Corporate Root Account

The Corporate Account page has been enhanced to let users update the market for the corporate structure. This applies to Customer Care and CostGuard Client.

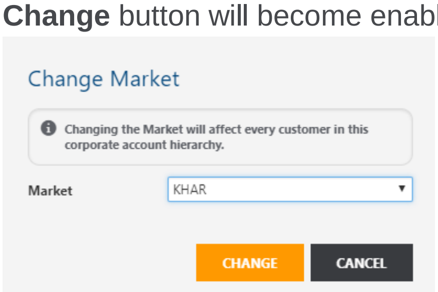
- Customer Care:



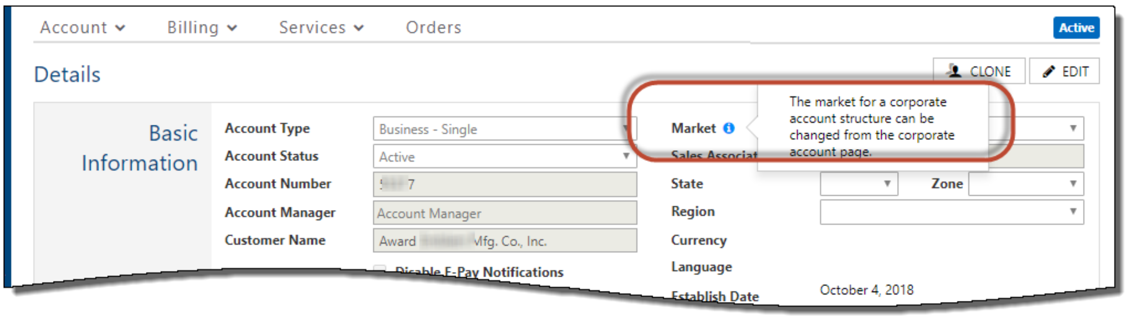
- CostGuard Client:



Selecting **Change Market** displays a dialog with the current Market for the account. The **Change** button will become enabled once the value is changed to another market.



In Customer Care, when editing a corporate account from the Account Details page, the Market remains noneditable. When you click the *more information* icon next to the market field, a message is displayed to let you know the market can be edited from the corporate account page.



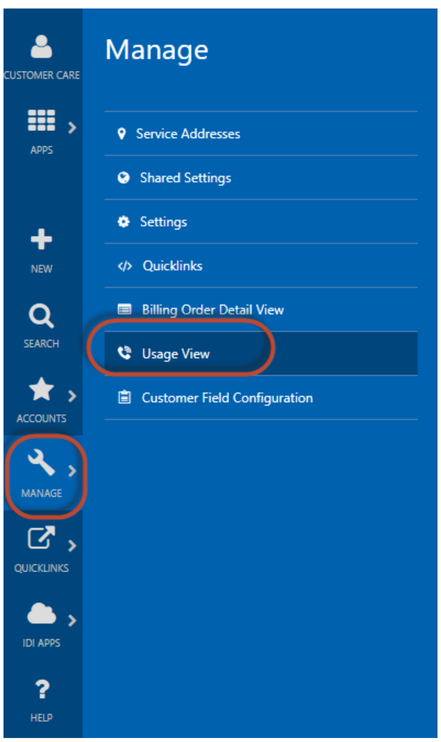
7 Adding Wholesale Cost and Cost to Usage Displays

This applies to both CostGuard Client and Customer Care.

- Customer Care
  Cost (Carrier Amount) and Wholesale Cost (CP Amount) may be included on Usage Details and Usage Summary grids for authorized users. These fields will only display for users that have the corresponding permissions enabled.
- CostGuard Client
  Cost and Wholesale Cost are displayed on Usage Type and Wireline Usage Summaries, and Usage Details grids when users choose to display all columns (no new permission required).

7.1 CUSTOMER CARE SETUP

There are new environment-level settings for the Detail and Summary views that let you show/hide cost and wholesale cost fields on those grids in Customer Care. The settings are available via **MANAGE** > **Usage View**.



Usage View

Usage Detail View

Enabled	Display Order	Description	Display Name
✓ 🔒	1	Is Included in Discount	
✓ 🔒	2	Call Start Date/Time	Date
✓ 🔒	3	Service Number	Service Number
✓	4	Event Direction	Direction
✓	5	Other Party Number	Number
✓	6	Location	Location
✓	7	Usage Type	Usage Type
✓	8	Distance Type	Distance Type
✓	9	Units	Units
✓	10	Cost	Cost
✓	11	Wholesale Cost	Wholesale Cost
✓	12	Charge	Charge
✗	13	Service Type	Service Type

Usage Summary View

Enabled	Display Order	Description	Display Name
✓ 🔒	1	Service Number	Service Number
✓ 🔒	2	Service Catalog Description	Description
✓ 🔒	3	Usage Type	Usage Type
✓ 🔒	4	Distance Type	Distance Type
✓ 🔒	5	Units	Units
✓ 🔒	6	Charge	Charge
✓	7	Cost	Cost
✓	8	Wholesale Cost	Wholesale Cost

Click the corresponding pencil icon to enable toggling the settings. Disabling (unchecking) a field will hide it.

Usage Detail View

Enabled	Display Order	Description	Display Name
✓ 🔒	1	Is Included in Discount	
✓ 🔒	2	Call Start Date/Time	Date
✓ 🔒	3	Service Number	Service Number
☑	4	Event Direction	Direction
☑	5	Other Party Number	Number
☑	6	Location	Location
☑	7	Usage Type	Usage Type
☑	8	Distance Type	Distance Type
☑	9	Units	Units
☑	10	Cost	Cost
☐	11	Wholesale Cost	Wholesale Cost
☑	12	Charge	Charge
☐	13	Service Type	Service Type

SAVE CANCEL

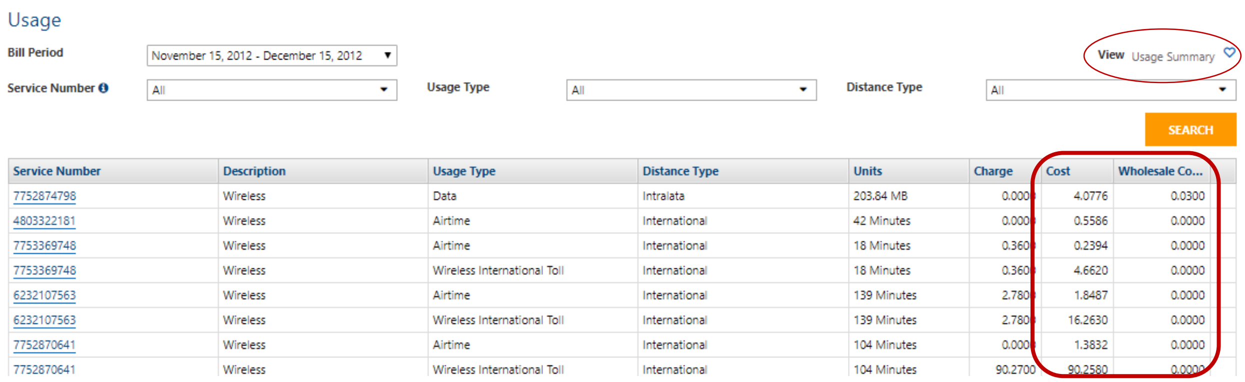
Note: Once enabled, you can drag and drop fields on the Usage Detail view to change the display order on the grid. The display order for fields on the Usage Summary view cannot be changed.

7.2 VIEWING COST AND WHOLESALE COST FIELDS

7.2.1 CUSTOMER CARE

On the Usage page (Billing > Usage), when enabled, the Cost and Wholesale Cost field values will be displayed on the Usage Summary and Usage Detail grids.

Note: The position of these fields is not configurable on the Summary view; however, you can adjust field position on the Details view via Usage View configuration.



Usage

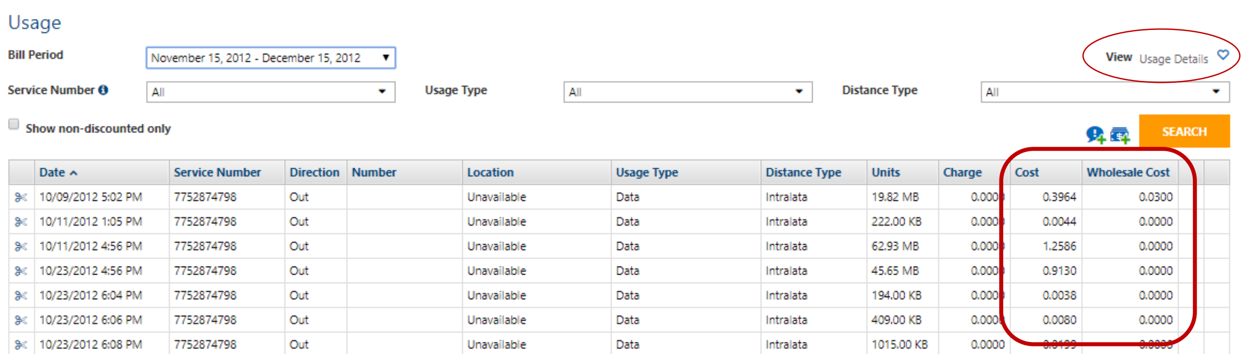
Bill Period: November 15, 2012 - December 15, 2012

View: Usage Summary

Service Number: All | Usage Type: All | Distance Type: All

SEARCH

Service Number	Description	Usage Type	Distance Type	Units	Charge	Cost	Wholesale Co...
7752874798	Wireless	Data	Intralata	203.84 MB	0.000	4.0776	0.0300
4803322181	Wireless	Airtime	International	42 Minutes	0.000	0.5586	0.0000
7753369748	Wireless	Airtime	International	18 Minutes	0.360	0.2394	0.0000
7753369748	Wireless	Wireless International Toll	International	18 Minutes	0.360	4.6620	0.0000
6232107563	Wireless	Airtime	International	139 Minutes	2.780	1.8487	0.0000
6232107563	Wireless	Wireless International Toll	International	139 Minutes	2.780	16.2630	0.0000
7752870641	Wireless	Airtime	International	104 Minutes	0.000	1.3832	0.0000
7752870641	Wireless	Wireless International Toll	International	104 Minutes	90.2700	90.2580	0.0000



Usage

Bill Period: November 15, 2012 - December 15, 2012

View: Usage Details

Service Number: All | Usage Type: All | Distance Type: All

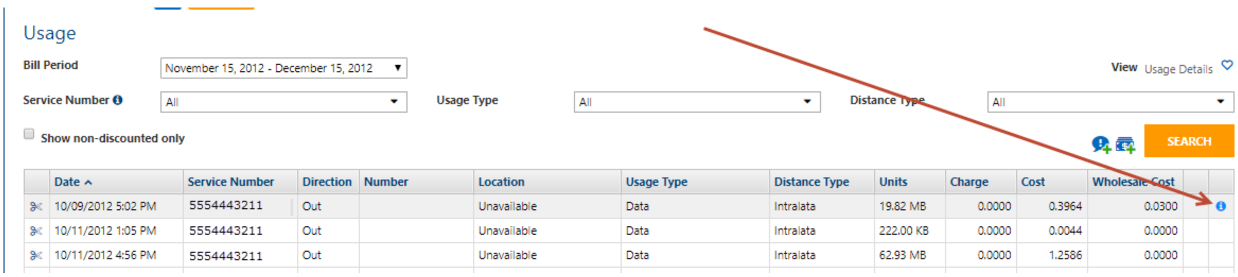
Show non-discounted only

SEARCH

Date	Service Number	Direction	Number	Location	Usage Type	Distance Type	Units	Charge	Cost	Wholesale Cost
10/09/2012 5:02 PM	7752874798	Out		Unavailable	Data	Intralata	19.82 MB	0.000	0.3964	0.0300
10/11/2012 1:05 PM	7752874798	Out		Unavailable	Data	Intralata	222.00 KB	0.000	0.0044	0.0000
10/11/2012 4:56 PM	7752874798	Out		Unavailable	Data	Intralata	62.93 MB	0.000	1.2586	0.0000
10/23/2012 4:56 PM	7752874798	Out		Unavailable	Data	Intralata	45.65 MB	0.000	0.9130	0.0000
10/23/2012 6:04 PM	7752874798	Out		Unavailable	Data	Intralata	194.00 KB	0.000	0.0038	0.0000
10/23/2012 6:06 PM	7752874798	Out		Unavailable	Data	Intralata	409.00 KB	0.000	0.0080	0.0000
10/23/2012 6:08 PM	7752874798	Out		Unavailable	Data	Intralata	1015.00 KB	0.0000	[illegible]	[illegible]

Usage Details Dialog

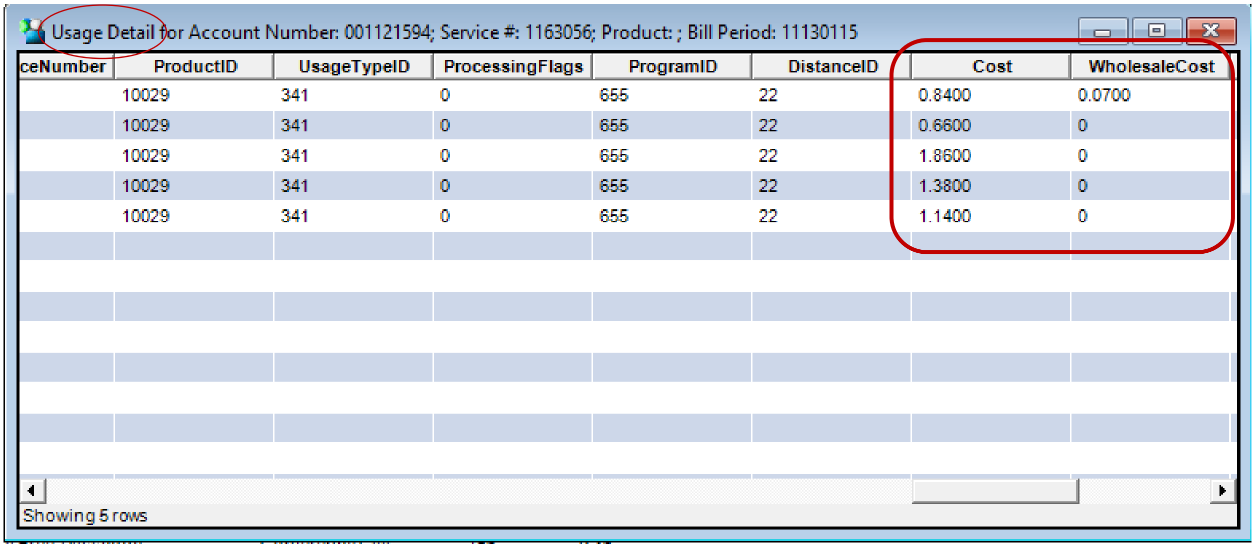
For users with Cost and Wholesale Cost permissions enabled, on clicking the *View Details* icon for an entry in the Usage Details grid, the cost and wholesale cost will be displayed on the Rating tab.



Note that the only change to this dialog is that the display of Cost and Wholesale Cost is controlled by a permission.

7.2.2 COSTGUARD CLIENT

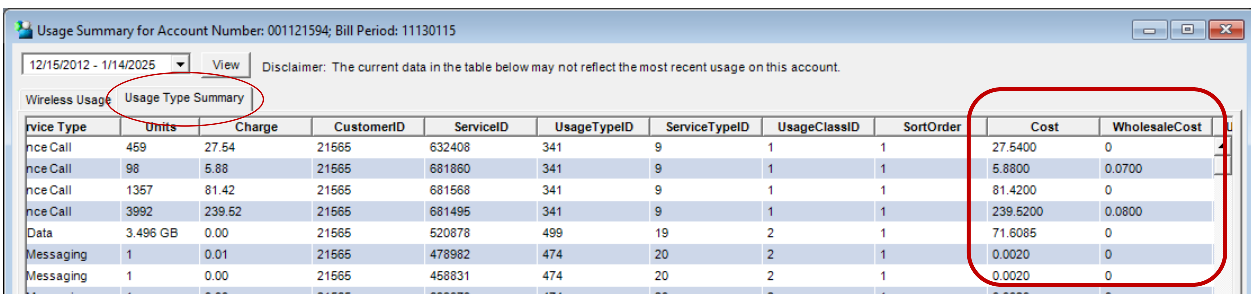
Cost and Wholesale Cost will be displayed when **Columns > All** is selected on the Usage Details or Usage Summary grid.



Usage Detail for Account Number: 001121594; Service #: 1163056; Product: ; Bill Period: 11130115

ceNumber	ProductID	UsageTypeID	ProcessingFlags	ProgramID	DistanceID	Cost	WholesaleCost
	10029	341	0	655	22	0.8400	0.0700
	10029	341	0	655	22	0.6600	0
	10029	341	0	655	22	1.8600	0
	10029	341	0	655	22	1.3800	0
	10029	341	0	655	22	1.1400	0

Showing 5 rows



Usage Summary for Account Number: 001121594; Bill Period: 11130115

12/15/2012 - 1/14/2025 View Disclaimer: The current data in the table below may not reflect the most recent usage on this account.

Wireless Usage | Usage Type Summary

rvice Type	Units	Charge	CustomerID	ServiceID	UsageTypeID	ServiceTypeID	UsageClassID	SortOrder	Cost	WholesaleCost
nce Call	459	27.54	21565	632408	341	9	1	1	27.5400	0
nce Call	98	5.88	21565	681860	341	9	1	1	5.8800	0.0700
nce Call	1357	81.42	21565	681568	341	9	1	1	81.4200	0
nce Call	3992	239.52	21565	681495	341	9	1	1	239.5200	0.0800
Data	3.496 GB	0.00	21565	520878	499	19	2	1	71.6085	0
Messaging	1	0.01	21565	478982	474	20	2	1	0.0020	0
Messaging	1	0.00	21565	458831	474	20	2	1	0.0020	0