

Core Release Bulletin

CostGuard Solution 19.3 Release

March 2019

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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 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.

1 Release Summary

1.1 CHANGE ORDERS/ENHANCEMENTS

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

Functional Area	AR/FR	Description
Customer Care	FR 2989	View Credit Reports in Care via new page
	FR 3025	Extended Exemptions display enhancements - When adding tax exemptions in Customer Care, Tax Type and Category have been added to the display of selected exemptions to improve the user experience.
Orders	FR 2955	Swap equipment enhancements: <ul style="list-style-type: none"> Swap equipment on a service back to the previous values; accommodates customers who just received a new handset but want to go back to their previous handset so the new handset can be given to another family member Swap the equipment between two services on the same account; accommodates customers who want to exchange equipment between services. The application will support the ability to choose a service to swap handsets with another service on the same account. The application will automatically assign the equipment based upon the chosen service to swap with and will not require users to type in the Handset ID (or embedded SIM ID) Task Plan/Provisioning will be updated to do the following: <ul style="list-style-type: none"> Provision multiple swap equipment orders on an Order in the correct order to mitigate provisioning errors Incorporate swapping to a temporary handset/SIM IDs when performing SWAP Equipment orders as the system will do it for them within the Task Plan. This will use the same Dummy ESN Pool functionality as their Port In logic does today.
Product Catalog - Discounts	AR 8209	Tiered Volume Discount enhancements - Ability to read number of lines on an account, and discount off of the <i>in advance</i> portion as well as the <i>prorated</i> portion. <ul style="list-style-type: none"> Discount will live at the service level, and those instances represent a service so the system can simply count the number of discounts. New Configuration option to have service level assigned discounts count contributing products across the entire account Add Prorating the flat amount for partial month charges When counting service only count those that are active at the time of billing (active on the last day of the bill period) Tiers can be set up for the dollar amount off per service (create buckets) and the biller will do the math.
RateBill	FR 3027	Do Not Charge Federal Taxes if Country is Not USA - During billing, determine which location is being used for taxing – Primary, Service Contact, Service Address (existing functionality) If country is configured as anything other than USA or [NULL], the system will skip Federal Taxing (just as it would if the account/service was set as Federal tax exempt).

1.2 RESOLVED KNOWN ISSUES

The following known issues have been resolved in this release.

Functional Area	PR	Description
Customer Care	82920	Updated Customer Care to correctly set the state when a user creating an E-Pay bank account types the full state name in the Auth.net iFrame. On entering an invalid state, users will be prompted to select a valid value from a drop-down.
	82943	Customer field configuration - Updated Customer Care so that State has a default value on creating a new customer.
	82954	Discount Details pop-up is blank - Fixed issue where large integer ID values were not being returned correctly when the ID values were larger than 2 ⁵² .
	82982	Updated Customer Care to correctly display SKU Description for Retail Warranties.
Workflow	82923	Extended Data templates are being evaluated multiple times during WorkflowInstance creation. One of these evaluations was happening before the instance had been saved to the database, so that logging messages were written for replacements that didn't exist. Changed WorkflowCreator.cs and ExtendedInformationPopulator.cs to not evaluate the extended data more than necessary.
	82924	Updated validation across actions for a step with multiple tasks. Prior to this update, one task may have required fields that cause another task's non-required fields to fail validation, if they are the same property.
OnlineBill	82932	Changed the Resolution field to display the Resolution Note as opposed to Resolution Type. Removed the Ticket Type from the display.
Orders	82942	Workflow error on Order Import - Updated the Web Service to address deadlock issues.
Web Apps General	82948	Resolved an issue that prevented large attribute definitions from being loaded in Customer Care, Tickets and Orders.
POS	82900	Source Codes were all being displayed regardless of their start date or end date. Updated Source Codes logic to only display active codes.
	82934	Tender Type button - in the processing chain, moved the logic that sets up button text to avoid instances where button text is not set appropriately.
RateBill	82927	Navajo Reservation Sales Tax would not be applied to account if the account had the County Tax exemption checkbox checked and a county level tax jurisdiction assigned. This combination caused the regional Navajo Reservation Sales Tax to not apply. Billing tax engine no longer exempts the regional tax based on a county tax exemption.
	82902	Fixed a bug in the pricing plan logic that was causing orders with multiple new services to miss overlaps.
	82949	Outcollect failure - Added table indexes to improve outcollect performance.
Customer Management	82876	Error on Workplan tied to Attribute: The order loading functionality was not handling the case where the catalog had an attribute but the instance did not. This left catalog items in an odd state as it tried to save data and failed when saved. Updated the save logic to handle the case where the catalog had an attribute but the instance did not.

2 Customer Care

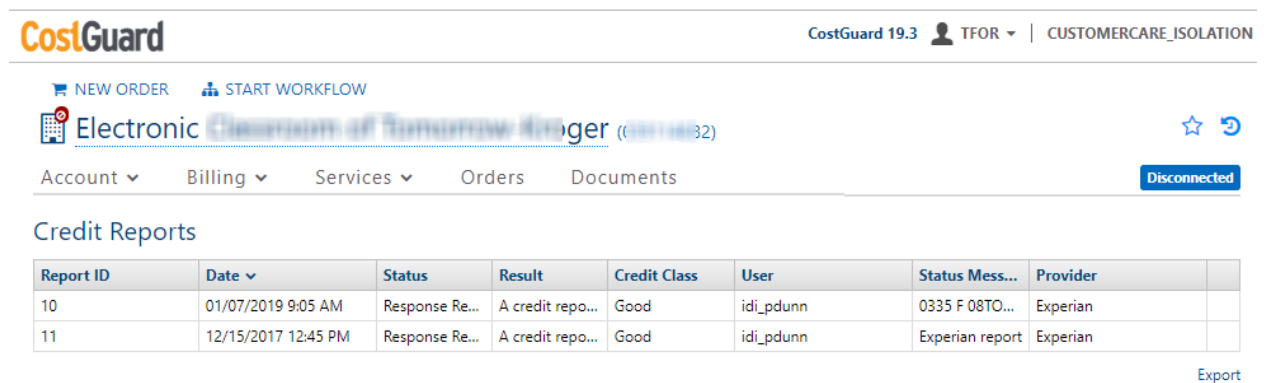
2.1 VIEWING CREDIT REPORTS

A new page has been added to Customer Care to display credit reports that have been run for an account. This page supports viewing reports from the three credit bureaus supported in CostGuard: Equifax, Experian and Transunion.

Navigation to the page is via **Account > Credit Reports**.

Note: This menu item is only available from the new navigation menu, and not the rainbow bar menu.

The new page will display the credit reports that have been run for a customer, with the most recent first. Users with *Allow Log On* permission can access this page.



Report ID	Date	Status	Result	Credit Class	User	Status Mess...	Provider
10	01/07/2019 9:05 AM	Response Re...	A credit repo...	Good	idi_pdunn	0335 F 08TO...	Experian
11	12/15/2017 12:45 PM	Response Re...	A credit repo...	Good	idi_pdunn	Experian report	Experian

The columns at the far right provide access to the credit report and the details received from the credit bureau.

Credit Reports							
Report ID	Date	Status	Result	Credit Class	User	Status Message	Provider
10	01/07/2019 9:05 AM	Response Received	A credit report was successfully retrie...	Good	idi_pdunn	0335 F 08TOO MANY INQUIRIES LAS...	Experian
11	12/15/2017 12:45 PM	Response Received	A credit report was successfully retrie...	Good	idi_pdunn	Experian report	Experian

2.1.1 VIEWING CREDIT REPORT

Users with *Allow Log On* permission can click the icon in the 2nd from the right column to open the credit report. **Note:** *View Confidential Information* permission is required to see the SSN and date of birth fields on the report (they are otherwise masked).

Example Credit Report:

View Credit Report 10	
Report Information Status Response Received Request Date 01/07/2019 9:05 AM User Name idl_pdunn Credit Result A credit report was successfully retrieved. Credit Class Good Status Message 0335 F 0800 MANY INQUIRIES LAST 12 MONTHS Error Code	Score Details Score 702 Score Range - Score Factor Code 1 Score Factor Code 2 Score Factor Code 3 Score Factor Code 4
Request Information First Name Last Name Good User Street 1 Street 2 City State Zip Apartment Number Phone Number SSN 66-28 Date of Birth 12/24/1958	Response Information First Name Last Name Good User Street 1 Street 2 City State Zip Apartment Number Phone Number SSN 66- Date of Birth 12/24/1958 Last Name 2

2.1.2 VIEW DETAILS

Users with *View Confidential Information* permission can click the icon in the far-right column to view the details received from the credit bureau.

Example:

View Credit Report 11 Details

Credit Report			
Date	Time	Preamble	ARF Version
01-17-2019	12:39:23	TAZ1	07

65182441

Name(s):

ANGELA M. ANGELA ANGELA T N 600000 34

SSN(s):

Addresses(s):

2650 N APT 130

MESA

AZ, 85 3055

708 N APT 225

MESA

AZ, 85 4939

419 N

MESA

AZ, 85 5318

First Reported: 04-20-2009

Last Updated: 05-07-2018

Origination: Reported via A/R Tape

Reported: 08

Last Subcode: 3202754

First Reported: 08-01-2017

Last Updated: 09-06-2017

Origination: Reported via A/R Tape, but different from inquiry

Reported: 00

Last Subcode:

First Reported: 09-25-2009

Last Updated: 08-28-2017

Origination: Reported via A/R Tape, but different from inquiry

Reported: 00

Last Subcode:

Dwelling Type: Multi-family dwelling

Home Ownership: Unknown

Census Geo Code:

County Code:

Dwelling Type: Apartment complex

Home Ownership: Unknown

Census Geo Code:

County Code:

Dwelling Type: Single-family dwelling

Home Ownership: Unknown

Census Geo Code:

County Code:

Employer(s):

RUSSELL

First Reported Date: 05-28-2013

Last Updated Date: 05-28-2013

Origination: Inquiry

Score Summary

Model	Score	Score Factors
Experian/Fair, Isaac Risk Model V2	660	39, 18, 14, 08

Fraud Shield Summary

Type: Inquiry address message

SIC:

Text: CKPT: BUSINESS ON FACS+ FILE/LORA RD/MESA AZ 8 3

IDI Billing Solutions | Confidential

8

3 Orders

3.1 SWAP EQUIPMENT ENHANCEMENTS

These Swap Equipment enhancements automate many of the manual steps to make swapping equipment easier, particularly when swapping equipment between Services on the same account. These enhancements were added to address the following scenarios:

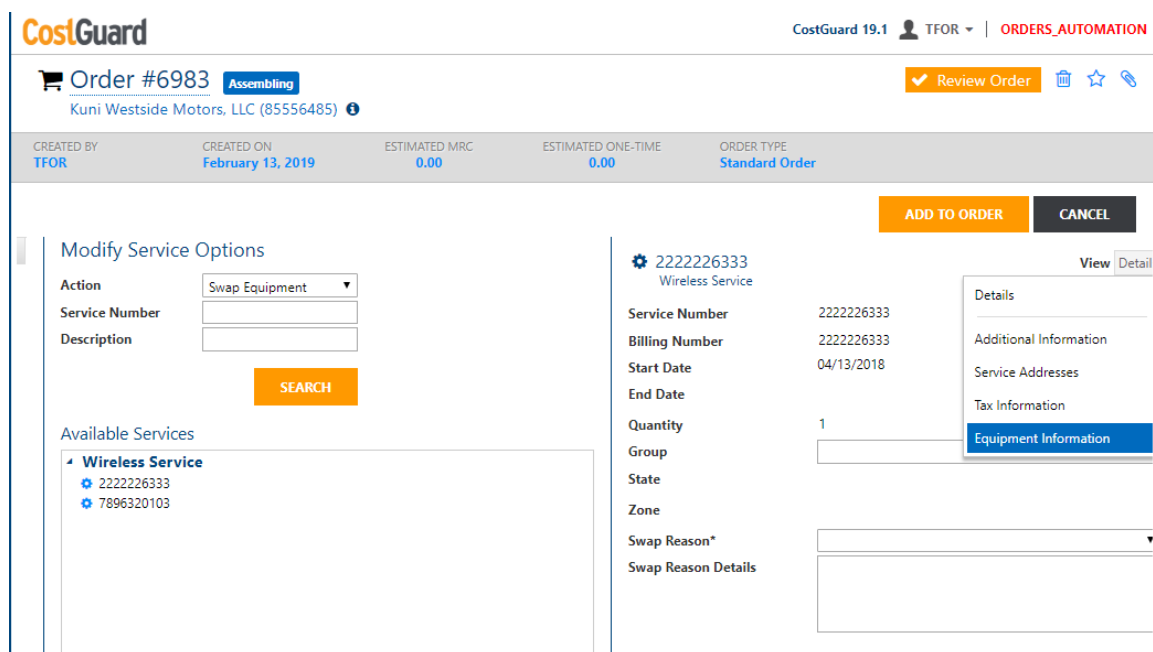
- **Swap equipment on a service back to the previous values** – This helps you accommodate customers who just received a new handset but want to go back to their previous handset so the new handset can be given to another family member.
- **Swap the equipment between two services on the same account** – This helps you accommodate customers who want to exchange equipment between services on the account. This automatically assigns the equipment based on the chosen service to swap with and will not require users to type in the Handset ID (or embedded SIM ID).

Task Plan/Provisioning has been updated to:

- Provision multiple swap equipment orders on an Order in the correct order to mitigate provisioning errors
- Incorporate swapping to a temporary handset/SIM IDs when performing Swap Equipment orders as the system will do it for them within the Task Plan. This will use the same Dummy ESN Pool functionality as Port In logic does today.

3.1.1 DIALOG CHANGES

To support this new functionality, when swapping equipment, the *Equipment Information* view (under View Details) provides several new options.



CostGuard CostGuard 19.1 TFOR | ORDERS AUTOMATION

Order #6983 Assembling
Kuni Westside Motors, LLC (85556485)

CREATED BY TFOR CREATED ON February 13, 2019 ESTIMATED MRC 0.00 ESTIMATED ONE-TIME 0.00 ORDER TYPE Standard Order

Modify Service Options

Action: Swap Equipment
Service Number:
Description:
SEARCH

Available Services

- Wireless Service
 - 2222226333
 - 7896320103

2222226333
Wireless Service

Service Number: 2222226333
Billing Number: 2222226333
Start Date: 04/13/2018
End Date:
Quantity: 1
Group:
State:
Zone:
Swap Reason*:
Swap Reason Details:

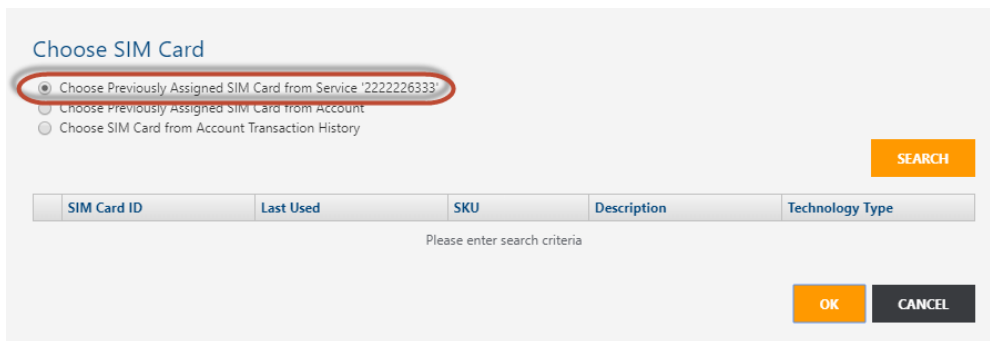
View Details

- Details
- Additional Information
- Service Addresses
- Tax Information
- Equipment Information**

ADD TO ORDER **CANCEL**

Choose SIM Card

When you search on a SIM Card, the dialog provides a new option to Choose Previously Assigned SIM Card from Service XXXXXXXXXX.



Choose SIM Card

☒ Choose Previously Assigned SIM Card from Service '2222226333'
☐ Choose Previously Assigned SIM Card from Account
☐ Choose SIM Card from Account Transaction History

SEARCH

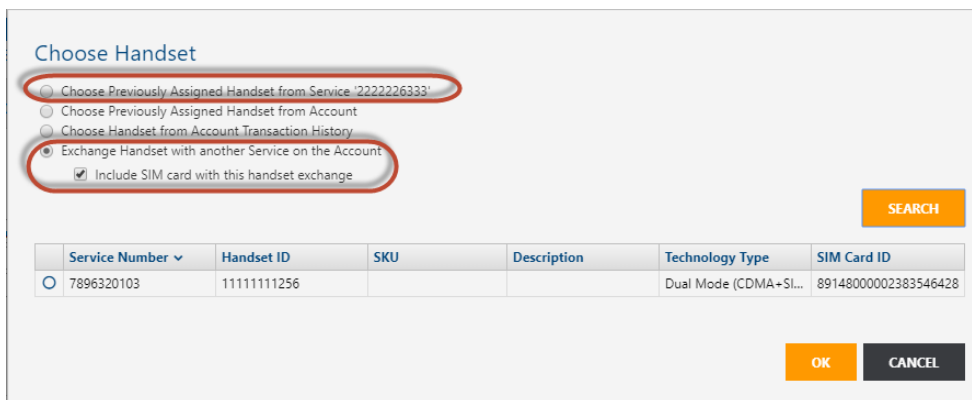
SIM Card ID	Last Used	SKU	Description	Technology Type
Please enter search criteria				

OK CANCEL

Choose Handset

When you search on a handset, the dialog provides two new options.

- Choose Previously Assigned SIM Card from Service XXXXXXXXXX.
- Exchange handset with another Service on the Account



Choose Handset

☒ Choose Previously Assigned Handset from Service '2222226333'
☐ Choose Previously Assigned Handset from Account
☐ Choose Handset from Account Transaction History
☒ Exchange Handset with another Service on the Account
☒ Include SIM card with this handset exchange

SEARCH

Service Number	Handset ID	SKU	Description	Technology Type	SIM Card ID
7896320103	11111111256			Dual Mode (CDMA+SI...	89148000002383546428

OK CANCEL

Note: Both dialogs were previously labeled *Choose Equipment*.

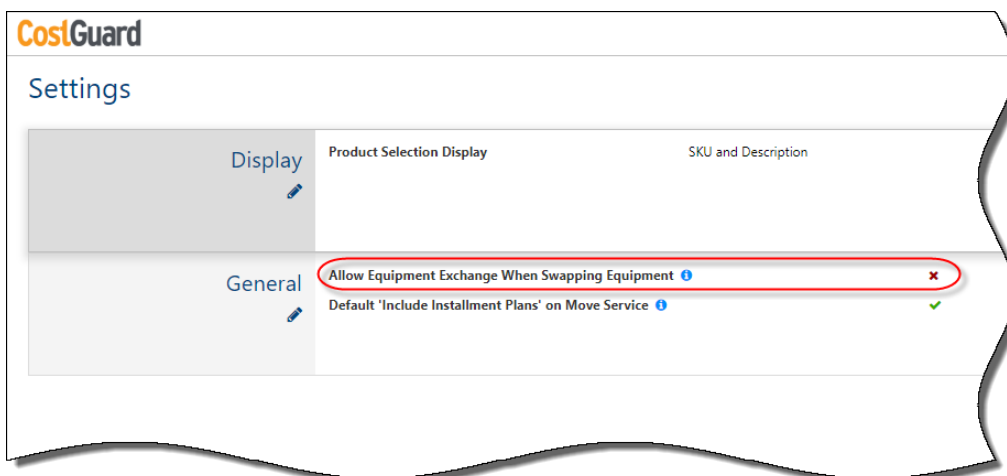
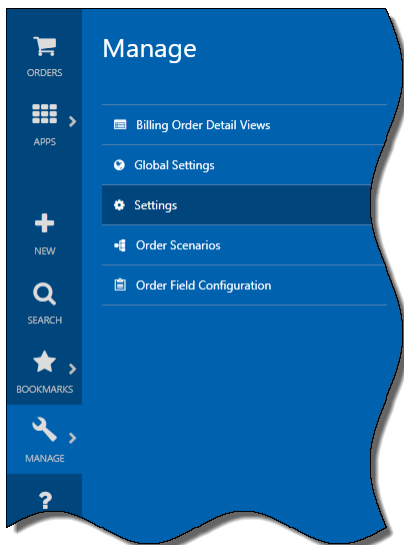
3.1.2 SETUP

The option to exchange handsets between two services on an account requires the **Allow Equipment Exchange When Swapping Equipment** setting to be enabled.

Caution: *DO NOT* enable the Exchange Equipment functionality without fully understanding the ramifications of exchanging equipment at the switch. Please consult with your Account Manager if you have interest in using this new functionality. Provisioning kit changes may be required.

Note: This setting is not required for swapping Equipment to Previous Equipment on the Service.

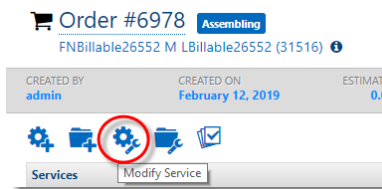
The setting to enable Exchange Equipment on swaps is available via **Manage > Settings** under **General**.



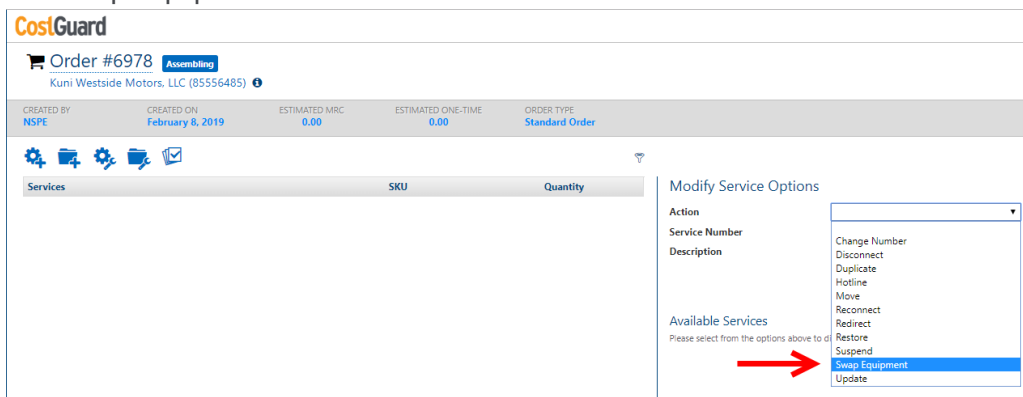
3.1.3 SWAP EQUIPMENT TO PREVIOUS EQUIPMENT ON A SERVICE

Starting choosing to Modify a Service and Swap Equipment. This is existing functionality:

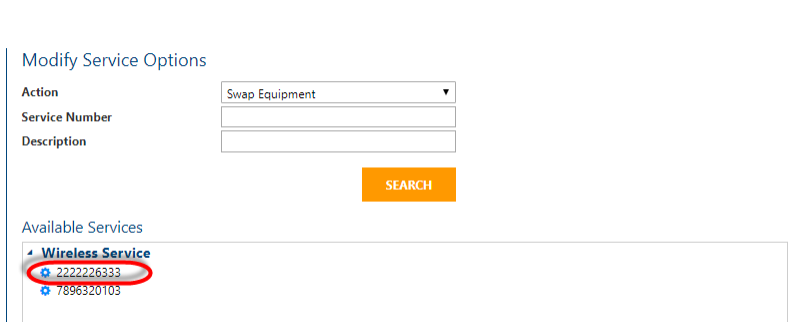
- Modify Service.



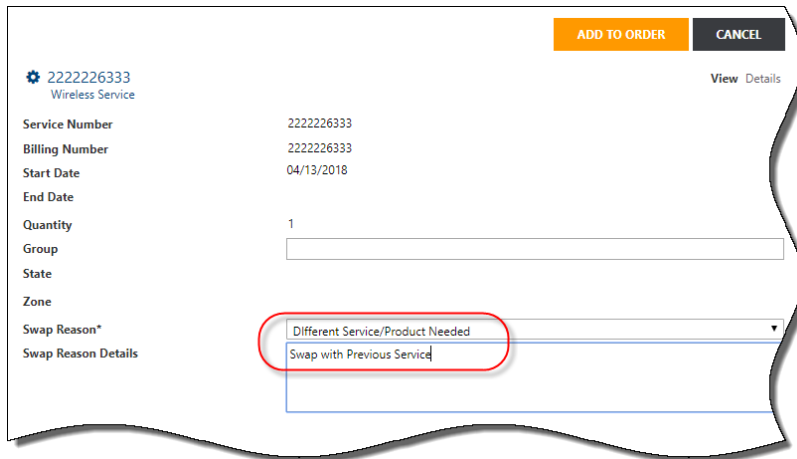
- Swap Equipment.



- Select the Service where you want to Swap the Handset.



- Choose a required Swap Reason from the drop down menu.



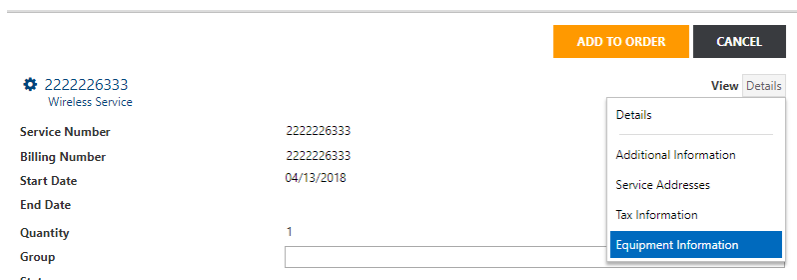
ADD TO ORDER CANCEL

2222226333
Wireless Service

View Details

Service Number 2222226333
Billing Number 2222226333
Start Date 04/13/2018
End Date
Quantity 1
Group
State
Zone
Swap Reason* Different Service/Product Needed
Swap Reason Details Swap with Previous Service

- Select **Equipment Information** from View Details.



ADD TO ORDER CANCEL

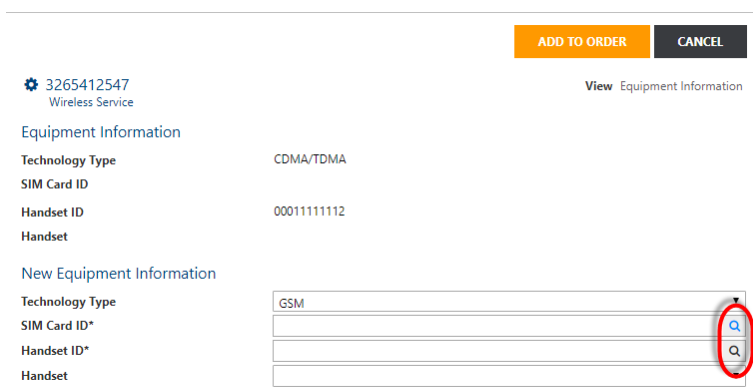
2222226333
Wireless Service

View Details

Details
Additional Information
Service Addresses
Tax Information
Equipment Information

Service Number 2222226333
Billing Number 2222226333
Start Date 04/13/2018
End Date
Quantity 1
Group

- Click the search icon for **SIM Card ID*** or **Handset ID***.



ADD TO ORDER CANCEL

3265412547
Wireless Service

View Equipment Information

Equipment Information

Technology Type CDMA/TDMA
SIM Card ID
Handset ID 00011111112
Handset

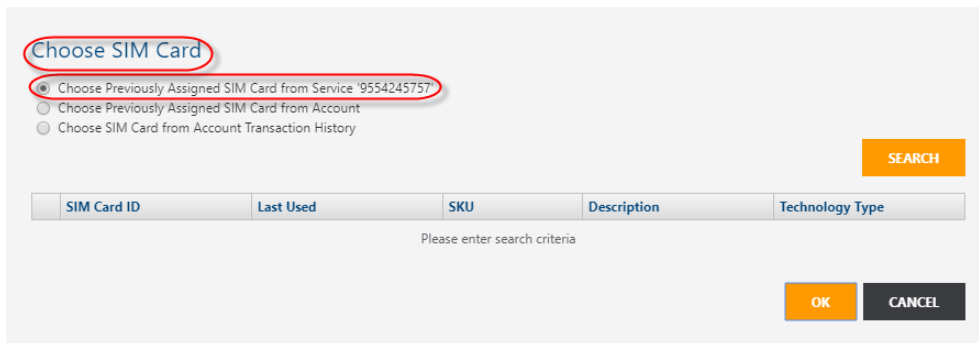
New Equipment Information

Technology Type GSM
SIM Card ID*
Handset ID*
Handset

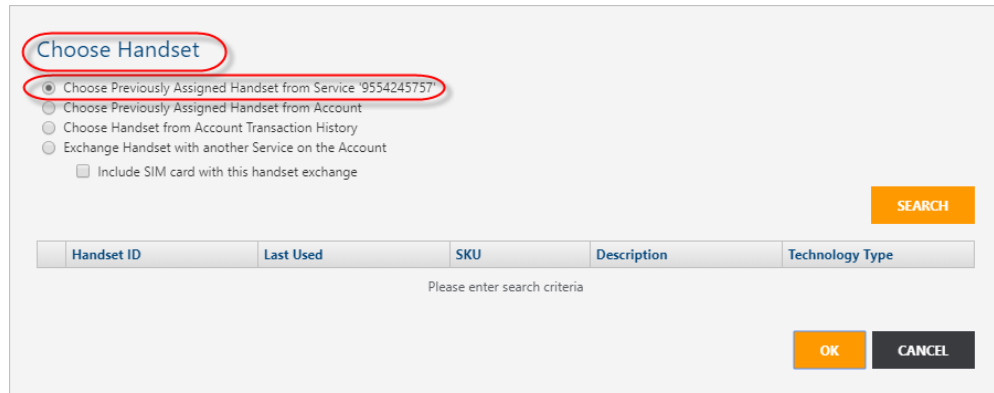
This displays either the *Choose SIM Card* or *Choose Handset* dialog depending on which field you chose to search. **Note:** This dialog was previously labeled Choose Equipment.

In either case, this dialog provides a new option to choose a previously assigned item (SIM card or Handset) from the selected Service. The dialog defaults to having this new option selected.

- For *Choose SIM Card*, clicking **SEARCH** with the new option selected returns all previously assigned SIM Cards in the grid below. **Note:** SIM Cards associated to a temporary Service Number will *NOT* be returned.



- For *Choose Handset*, clicking **SEARCH** with the new option selected returns all previously assigned handsets in the grid below. **Note:** Handsets associated to a temporary Service Number will *NOT* be returned.



- Choose an item (SIM Card or Handset), and then click **OK**. This returns you to Equipment Information screen.
- Under **New Equipment Information**, the selected Handset or SIM Card ID is now populated.

ADD TO ORDER CANCEL

222226333
Wireless Service

[View Equipment Information](#)

Equipment Information

Technology Type: Dual Mode (CDMA+SIM)
SIM Card ID: 8914800002383546568
Handset ID: 11111111777
Handset:

New Equipment Information

Technology Type: Dual Mode (CDMA+SIM)
SIM Card ID:
Handset ID: 11111111555
Handset:

- Add to Order. Selecting **ADD TO ORDER** adds the service to the grid.
- You can select the service in the grid and View Equipment Information in the right panel to see the New Equipment Information - New Handset ID and associated SIM Card ID.

Note: The SIM Card ID is the same ID under the original Equipment Information section below and the New Equipment Information section below because you only swapped the handset.

CREATED BY: NSPE
CREATED ON: February 13, 2019
ESTIMATED MRC: 0.00
ESTIMATED ONE-TIME: 0.00
ORDER TYPE: Standard Order

Services	SKU	Quantity
Wireless Service - 222226333		1

222226333
Wireless Service

[View Equipment Information](#)

Equipment Information

Technology Type: Dual Mode (CDMA+SIM)
SIM Card ID: 8914800002383546568
Handset ID: 11111111777
Handset:

New Equipment Information

Technology Type: Dual Mode (CDMA+SIM)
SIM Card ID: 8914800002383546568
Handset ID: 11111111555
Handset:

- Editing and Updating Order - Now that the service and associated handset are in the order, you can edit Equipment Information and update account and service level features.

SAVE CANCEL

Services	SKU	Quantity
Account Level Features		
Wireless Service - 222226333		1
60 Month Local MRC Multiplier	TERM 60 MO Local	1
Mohan Discount Test 01	Mo Discount Test 01	1
Test pac	Test pac	1

222226333
Wireless Service

[View Equipment Information](#)

Equipment Information

Technology Type: Dual Mode (CDMA+SIM)
SIM Card ID: 8914800002383546568
Handset ID: 11111111777
Handset:

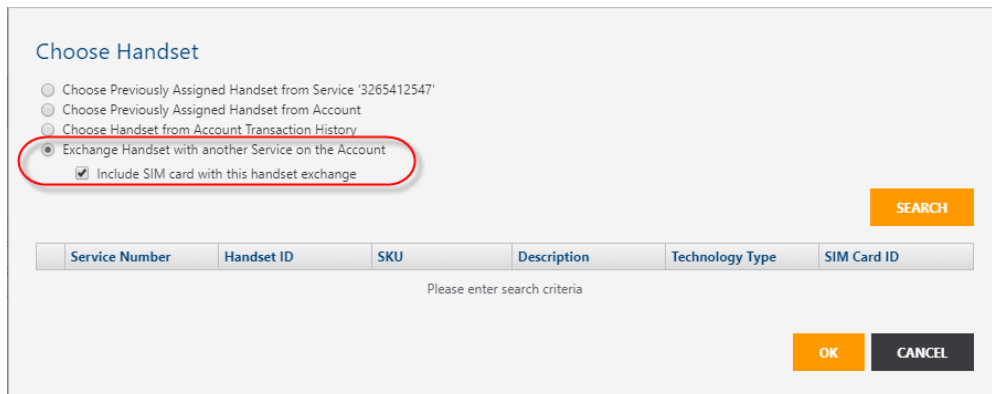
New Equipment Information

Technology Type: Dual Mode (CDMA+SIM)
SIM Card ID: 8914800002383546568
Handset ID: 11111111555
Handset:

3.1.4 EXCHANGE HANDSETS BETWEEN TWO SERVICES ON THE SAME ACCOUNT

This lets you exchange equipment between two services on the same account (for example, when two children change their minds and want to trade handsets).

- This procedure starts by choosing to Modify a Service and Swap Equipment.
- In the Equipment Information view you'll choose to Search on Handset ID.
- In the Choose Handset dialog choose the option to **Exchange Handset with another Service on the Account**. **Note:** This option is only available for handset exchanges (not when you search on SIM Card IDs in the Equipment Information view).
- Clicking **SEARCH** with this option selected returns previously assigned services in the grid below.
 - The handset is automatically assigned based upon the chosen service to swap with and will not require you to enter the Handset ID.
 - Only available services are returned. Services with a disconnect date will not be returned.



Choose Handset

☐ Choose Previously Assigned Handset from Service '3265412547'
☐ Choose Previously Assigned Handset from Account
☐ Choose Handset from Account Transaction History
☒ **Exchange Handset with another Service on the Account**
☒ Include SIM card with this handset exchange

SEARCH

Service Number	Handset ID	SKU	Description	Technology Type	SIM Card ID
Please enter search criteria					

OK **CANCEL**

- You may choose to **Include SIM card with handset exchange**.
 - This checkbox lets you exchange both the handset and associated SIM card in the same order.
 - Embedded SIM cards are automatically included in the exchange process.
 - This checkbox is grayed out by default. It is only available for selection when you select the **Exchange Handset** radio button.
- Select a service and click **OK**. This returns you to Equipment Information screen.

Choose Handset

☐ Choose Previously Assigned Handset from Service '222226333'
☐ Choose Previously Assigned Handset from Account
☐ Choose Handset from Account Transaction History
☒ Exchange Handset with another Service on the Account
☒ Include SIM card with this handset exchange

SEARCH

Service Number	Handset ID	SKU	Description	Technology Type	SIM Card ID
7896320103	11111111256			Dual Mode (CDMA+SI...	89148000002383546428

OK **CANCEL**

- Under New Equipment Information, the Handset ID selected from the list of handsets on the account eligible to be exchanged with existing service is now populated
 - The SIM Card ID is populated because the Include SIM card checkbox was checked in the previous screen.
 - Technology Type and Handset ID are grayed out and cannot be edited.
 - Handset ID is grayed out but can be edited using the search icon 🔍.
 - SIM Card ID can be edited using the search icon or by manually typing in a SIM Card ID.

ADD TO ORDER **CANCEL**

222226333
Wireless Service

View Equipment Information

Equipment Information

Technology Type: Dual Mode (CDMA+SIM)
 SIM Card ID: 89148000002383546568
 Handset ID: 11111111777
 Handset:

New Equipment Information - Exchanged from 7896320103


Technology Type: Dual Mode (CDMA+SIM)
 SIM Card ID: 89148000002383546428 🔍
 Handset ID: 11111111256 🔍
 Handset:


- Add to Order. When you select **ADD TO ORDER**, both services in the exchange of handsets, are added to the grid.
- You can select each service in the grid and View Equipment Information in the right panel to see the New Equipment Information - New Handset ID and associated SIM Card ID.

CREATED BY NSPE	CREATED ON February 14, 2019	ESTIMATED MRC 0.00	ESTIMATED ONE-TIME 0.00	ORDER TYPE Standard Order
--------------------	---------------------------------	-----------------------	----------------------------	------------------------------

Services	SKU	Quantity
<input type="checkbox"/> Wireless Service - 222226333		1
<input type="checkbox"/> Wireless Service - 7896320103		1

- Service 222226333





222226333
Wireless Service

View Equipment Information


Equipment Information


Technology Type	Dual Mode (CDMA+SIM)
SIM Card ID	8914800002383546568
Handset ID	11111111777
Handset	

New Equipment Information

Technology Type	Dual Mode (CDMA+SIM)
SIM Card ID	8914800002383546428
Handset ID	11111111256
Handset	

- Service 7896320103





7896320103
Wireless Service

View Equipment Information

Equipment Information

Technology Type	Dual Mode (CDMA+SIM)
SIM Card ID	8914800002383546428
Handset ID	11111111256
Handset	

New Equipment Information

Technology Type	Dual Mode (CDMA+SIM)
SIM Card ID	8914800002383546568
Handset ID	11111111777
Handset	

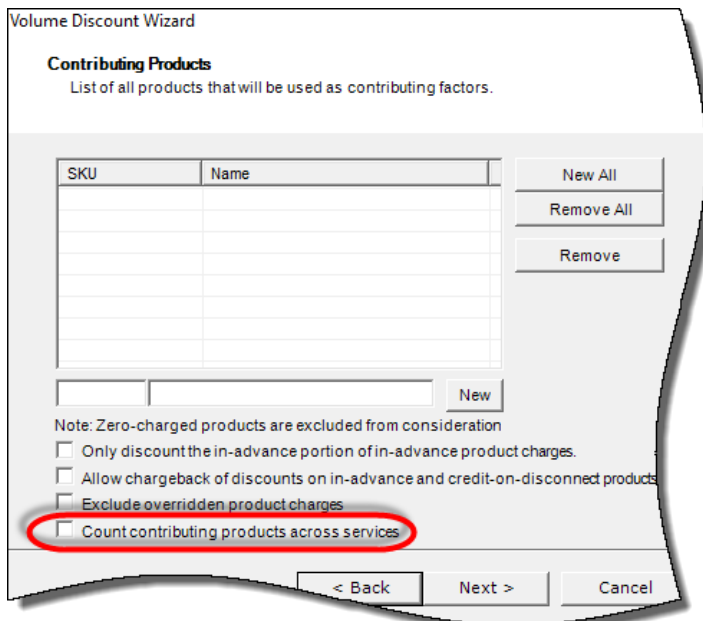
- Editing and Updating Order
 - Now that the service and associated handset are in the order, you can edit Equipment Information and update account and service level features on both services.

CREATED BY NSPE		CREATED ON February 14, 2019	ESTIMATED MRC 0.00	ESTIMATED ONE-TIME 0.00	ORDER TYPE Standard Order
Services		SKU	Quantity		
Wireless Service - 2222226333			1		
12 Month PL MRC Multiplier		TERM 12 MO PL	1		
Mohan Discount Test 01		Mo Discount Test 01	1		
Wireless Service - 7896320103			1		
60 Month Local MRC Multiplier		TERM 60 MO Local	1		

4 New Discount Options

4.1 COUNT CONTRIBUTING PRODUCTS ACROSS ALL SERVICES

Typically, a volume discount will only look at contributing products on the service that the discount is assigned to. With this release, the Discount wizard provides a new setting - *Count contributing products across services* – that directs the discount to count contributing products on services across the entire account.



Volume Discount Wizard

Contributing Products
List of all products that will be used as contributing factors.

SKU	Name

New All
Remove All
Remove

Note: Zero-charged products are excluded from consideration

- ☐ Only discount the in-advance portion of in-advance product charges.
- ☐ Allow chargeback of discounts on in-advance and credit-on-disconnect products
- ☐ Exclude overridden product charges
- ☐ **Count contributing products across services**

< Back Next > Cancel

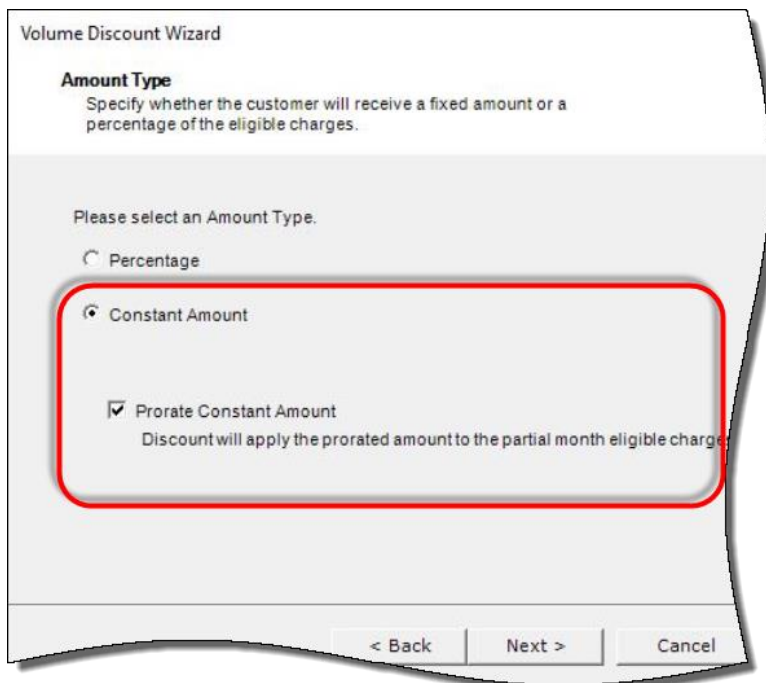
This setting has no impact on the logic for contributing product activity. Meaning, if the products are disconnected in the middle of a bill period, they are handled the same as they are today. This new setting does not apply to usage related tier units (minutes and number of units).

4.2 PRORATE CONSTANT AMOUNT

This is a new setting on the Volume Discount Wizard Amount Type page. When you select the **Constant Amount** radial button, the new **Prorate Constant Amount** setting will be available. This setting only works with product charges and constant amounts.

Note: Full month and partial month discount amounts will be rolled into a total amount that is displayed per service line on the invoice.

When there are multiple eligible products being prorated, the system will determine which one has the highest percentage and apply that amount across all prorated eligible products. This prevents those eligible products from accruing a higher discount amount than the full constant amount.



Volume Discount Wizard

Amount Type
Specify whether the customer will receive a fixed amount or a percentage of the eligible charges.

Please select an Amount Type.

☐ Percentage

☒ Constant Amount

☒ Prorate Constant Amount
Discount will apply the prorated amount to the partial month eligible charges

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