

# Core Release Bulletin

## *CostGuard Solution 19.4 Release*

April 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 3044	<b>Changed the default Menu for Customer Care from Rainbow Bar to New Menu.</b> All environments will default to the new hover menu upon upgrade. Capability to revert to the Rainbow Bar is available by updating a setting (Manage > Settings in Customer Care). Note that the Rainbow Bar menu no longer supports all menu options, and new functionality is only being added to the new menu.
Orders	FR 2954	<b>Roll-up Related Billing Order Status and Errors to parent Billing Order/</b> <ul style="list-style-type: none"> <li>The Billing Order view in both Customer Care and Orders has been enhanced to roll up related order information when applicable (similar to CostGuard Client).</li> <li>The Errors tab on the Billing Order view now displays provisioning errors as well as related order errors.</li> <li>Tabs on Billing Orders tabs now display icons as applicable..</li> </ul>
POS	AR 8357	<b>Expanded Tender Types that Allow Returns</b> - Updated register policy and tender form to allow gift cards, coupons, and gift certificates as returnable tenders.
Customer Mgmt – E-Pay	AR 8342	<b>A new SSN Lookup operation is provided in the Customer Management web service</b> to let users determine if the SSN is on when creating an account via the APIs.

## 1.2 RESOLVED KNOWN ISSUES

The following known issues have been resolved in this release.

Functional Area	PR	Description
Customer Care	82988	Updated Customer Care to omit <i>All</i> from the list of Market values that can be selected when editing the Market on an account.
	82969	Updated Corporate Account Charges on Invoice Page in Care so that when installment plans are included the charges are not doubled.
	82976	Updated Customer Care so that it does not go through the Payment Gateway for setup of a new ACH account if the <i>Bypass E-Check Transaction Processing</i> setting is enabled.
	82984	ACH Recurring End-date automatically getting populated - Updated Customer Care when creating a new ACH E-Pay account to not auto-populate the recurring end date for the account
	83003	Updated Customer Care to limit the length of the Description field for a payment plan to 100 characters.
Tickets	82870	Sort on Tickets Dashboard does not work – Updated the Tickets Dashboard to correctly sort on the <i>Name</i> column when the column header is clicked.
	82967	Ticket Email Received option not working - Updated the <i>Ticket Communication Notification</i> workflow action to work with an alias in the From Address field
Document Storage	82993	Issues downloading files - Fixed issues in Tickets and Customer Care with downloading Document Storage attachments.
Communications	82950	Updated Customer Care and Tickets to allow an email to be sent with the To, Cc, or Bcc email address has a period in the alias.
Workflow	82971	The timeout threshold for calls to web services from Workflow actions has been increased from 1 minute to 10 minutes. This makes it consistent with web services calls from the other web applications.

Functional Area	PR	Description
OnlineBill	83000	Issues with opening Tickets via OnlineBill - Updated the <i>Create Ticket from Email</i> Workflow action to associate the ticket created to an account when the primary billing contact email address on that account matches the <i>from</i> address on the incoming email.
Orders	82990	Users were unable to add a Disconnect line item to the Billing Order for an item where exclusivity rules should have automatically completed this step. Exclusivity rules are now honored during a swap equipment order. Fixed assignment templates browsing to allow for restricted items to be assigned since it is a form of guided assignment.
	82987	Package components added with same Cost and Wholesale values as the package - Fixed the swap logic to set the default value of the package components to zero
RateBill	82953	System no longer allows a calling area that is in use to be deleted.
	82962	The issue where, under a specific sharing and assignment scenario, the unit balance ledger can show incorrect balances has been corrected
	82945	Account Posting - Check Adjustments Monitoring - Updated the Charge Account Operation in the Balance Web Service to post adjustments and payments associated to E-Pay transactions.
Taxes	82914	CostGuard was not charging taxable items but the associated report looked like taxable amount was Zero. Now, when returning an AdvancePayProductPricePoint and zeroing out the tax amount, GrossSales and TaxBaseAmount are also zeroed out.
	82899	Exemption Problem with Surcharges – Added logic to the AllocateExemptChargesToSurchargeTaxBuckets to skip the surcharges exempted via extended exemptions. Validate the TaxDue and ExemptionCharges in the InvoiceTaxDetails when a tax is configured to exclude surcharges.
Customer Management	82974	Updated CostGuard client to prevent saving an invalid bank routing number on an ACH E-Pay account when the <i>Allow only known ABA Routing Numbers</i> E-Pay setting is enabled.
Product Management	82977	On a package, in the Product Catalog, if the <i>Is Restricted</i> setting is enabled this update will now allow restricted products to be included in Assignment Templates.

## 2 Orders

### 2.1 ROLL-UP RELATED ORDER INFORMATION TO PARENT BILLING ORDER

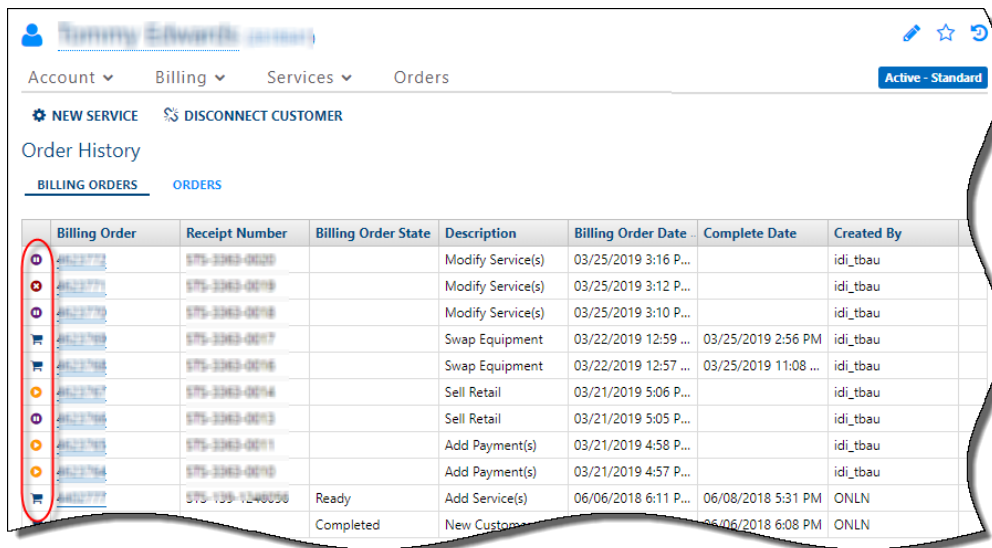
Any order generated from another order creates a Related Order relationship. Examples of Related Orders include Move Service orders, Fulfillment orders and Split Billing orders. The presentation of Billing Orders in both Customer Care and Orders now roll up all related order information to the root order, similar to what is supported in CostGuard Client.

#### 2.1.1 ORDER HISTORY PAGE – ROLLED UP ORDER STATUSES

The statuses of related orders, when applicable, are rolled up to the root order on the Order History Billing Orders tab. Order status is indicated by icons in the first column, with hover text and colors that align with statuses found in Orders.

As only one status can be displayed at a time, the displayed order status is calculated using the root order as the starting point and working down through related children as follows:

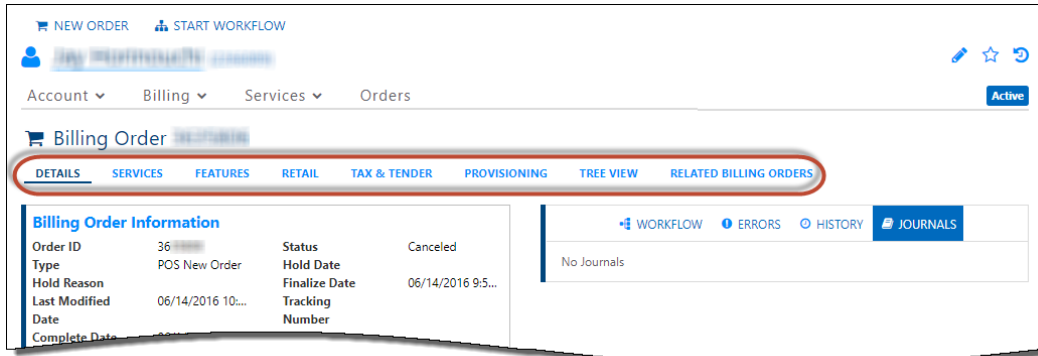
- If any related order is incomplete, that status takes precedence over all other statuses. In the case of multiple incompleted statuses, the first encountered is taken.
- If there are multiple non- complete, non-canceled statuses at the same level, CostGuard will use the following priority:
  - Incomplete
  - OnHold
  - InProcess
  - Submitted
  - Assembling
  - Completed
  - Canceled
- Otherwise the logic will default to the top-level status.



Billing Order	Receipt Number	Billing Order State	Description	Billing Order Date	Complete Date	Created By
4422772	575-3363-0020		Modify Service(s)	03/25/2019 3:16 P...		idi_tbau
4422771	575-3363-0019		Modify Service(s)	03/25/2019 3:12 P...		idi_tbau
4422770	575-3363-0018		Modify Service(s)	03/25/2019 3:10 P...		idi_tbau
4422769	575-3363-0017		Swap Equipment	03/22/2019 12:59 ...	03/25/2019 2:56 PM	idi_tbau
4422768	575-3363-0016		Swap Equipment	03/22/2019 12:57 ...	03/25/2019 11:08 ...	idi_tbau
4422767	575-3363-0014		Sell Retail	03/21/2019 5:06 P...		idi_tbau
4422766	575-3363-0013		Sell Retail	03/21/2019 5:05 P...		idi_tbau
4422765	575-3363-0011		Add Payment(s)	03/21/2019 4:58 P...		idi_tbau
4422764	575-3363-0010		Add Payment(s)	03/21/2019 4:57 P...		idi_tbau
4422777	575-139-1240036	Ready	Add Service(s)	06/06/2018 6:11 P...	06/08/2018 5:31 PM	ONLN
		Completed	New Custom...		06/06/2018 6:08 PM	ONLN

## 2.1.2 BILLING ORDER VIEW – MISCELLANEOUS ENHANCEMENTS

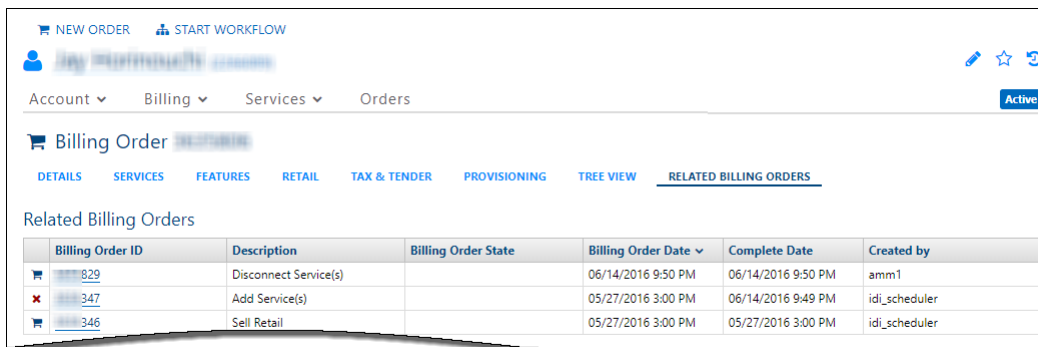
Selecting a Billing Order on the Order History page takes you to the Billing Order View with multiple tabs for displaying order details.



Some tabs on the Billing Order View have been updated to support rolling up related order information.

### Related Billing Orders Tab

This tab lists all Billing Orders related to the selected Billing Order as applicable. The tab is empty when there are no related Billing Orders.



You can drill down to get details on a related order by clicking the associated Billing Order ID.

## Details Tab

On the Details tab, the following fields have been updated with rolled up statuses and/or dates:

- Status
- Complete Date
- Finalize Date
- Last Modified
- Tracking Number

If any root order or related order date is null, regarding the dates listed above, the date will show as null. If there is one or multiple dates on the order(s) between root order and related order, the date displayed will be the farthest date.

If there is a Tracking Number, on a root order, but a null value on a related order, the null value will display at the root order level

DETAILS
SERVICES
FEATURES
RETAIL
TAX & TENDER
PROVISIONING
TREE VIEW
RELATED BILLING ORDER

### Billing Order Information

Order ID	3630448	Status	In-Process
Type	POS New Order	Hold Date	
Hold Reason		Finalize Date	05/23/2016 10:10 PM
Last Modified Date	05/23/2016 10:20 PM	Tracking Number	
Complete Date			

### Transaction Information

Transaction Type	Sales Request
Transaction Status	Reconciled
Inventory Location	BrightStar
Reference Number	778787
LastModifiedDate	05/23/2016 10:10 PM
Finalize Date	05/20/2016 6:32 PM
Complete Date	05/23/2016 10:10 PM
Sales Channel	
Tracking Number	

### Total Information

Estimated MRC	182.48
Total Bill Payments	0.00
Total Deposits	0.00
Total Tax	97.36
Total Due	97.36

### Additional Order Information [Collapse All](#)

Online Order Number	
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## Services, Features & Retail Tab

These tabs have been updated to provide:

- Rolled up status of the root order and their related orders
- Icons with hover text and colors that align with statuses found in Orders

DETAILS

SERVICES

FEATURES

RETAIL





TAX & TENDER

PROVISIONING

TREE VIEW

RELATED BILLING ORDERS

Services

Service Number ^	Service Type	New Plan	
 	SWireless	Share Everything Primary Line 10GB	24
 	SWireless	Share Everything Dependent Line	

DETAILS

SERVICES

FEATURES

RETAIL










TAX & TENDER

PROVISIONING

TREE VIEW

RELATED BILLING ORDERS

Features

Effective Date	Service Number ^	Type	To	From
 01/13/2019 12:00 AM	2111111111	Equipment Insurance	Restore Wireless Protection...	
 02/22/2019 12:00 AM	2111111111	Plans	Restore Share Everything Pr...	
 02/22/2019 12:00 AM	2111111111	Mobile-to-Mobile	Restore Unlimited Network ...	
 02/22/2019 12:00 AM	2111111111	Text Messaging	Restore Unlimited SMS Bun...	
 09/29/2016 12:00 AM	2111111111	Discounts	Restore \$5 off unlimited tal...	
 02/22/2019 12:00 AM	2111111111	AppleCare Plus MRC	Restore Disconnect AppleC...	
 02/22/2019 12:00 AM	2111111111	Voicemail	Restore iPhone Visual Voice...	
 02/22/2019 12:00 AM	2111111111	International Calling	Restore Enable Internationa...	
 02/22/2019 12:00 AM	2111111111	3G Web	Restore Unlimited talk & te...	

DETAILS

SERVICES

FEATURES

RETAIL

TAX & TENDER

PROVISIONING

TREE VIEW

RELATED BILLING ORDERS

Retail

Item Number ▾	SKU	Description	Service Number	Purchased	Returned
 13	S1111111111	Premium Shipping		0	0
 8	1001840	Alcatel Go Flip 2 - Bla...	6511111111	0	0
 7	2000440	S SIM Card 2A - XXXX...	6511111111	0	0
 3	3000415	Alcatel flip phone SIM...	6511111111	0	0

## Tree View

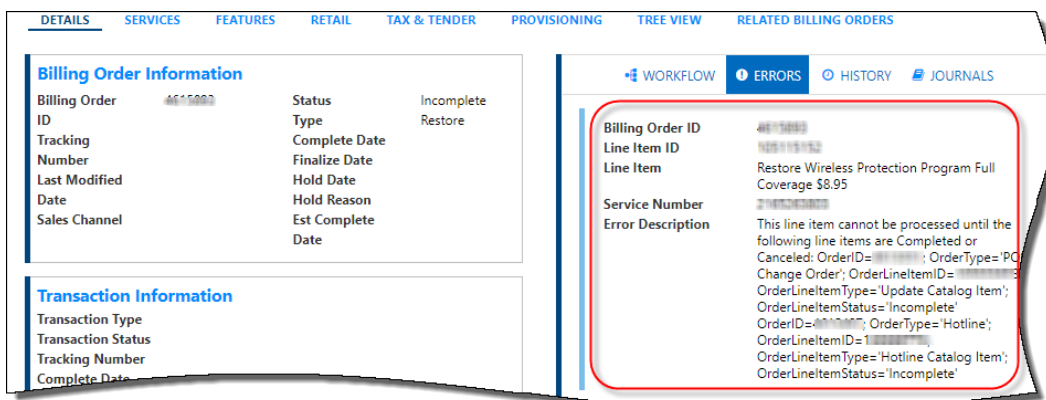
The Tree View looks and behaves similar to the current CostGuard Client view. You can expand the order tree view, to identify the line item rolling up as the overall billing order status.



## Error Tab

The Errors tab now displays:

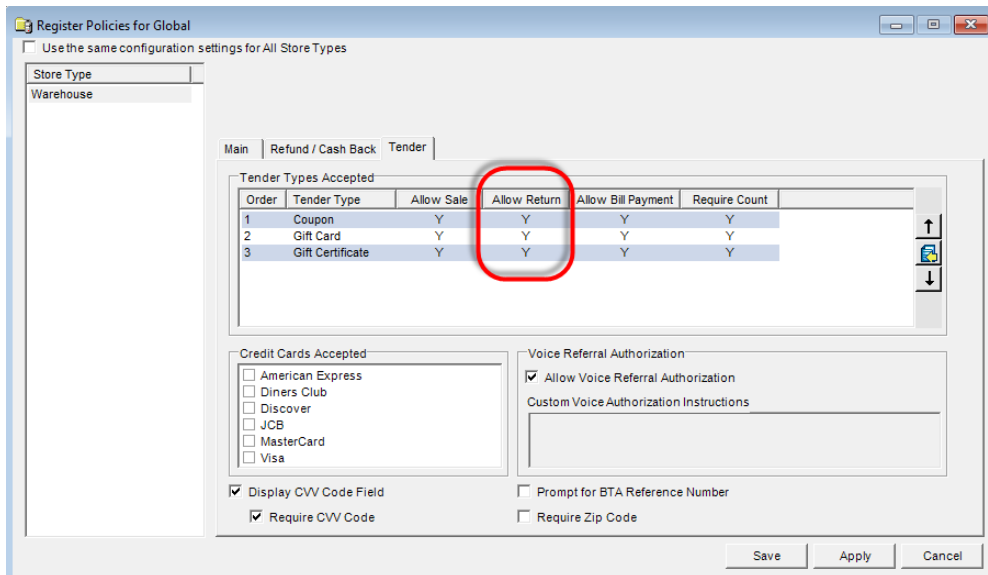
- The errors of all orders associated with the account, not just the root account errors
  - Errors for Related billing orders are included
- Errors are ordered/displayed by:
  - Order ID then by Line Item ID



## 3 POS

### 3.1 RETAIL SALES CREDIT CARD TENDERING OPTION

The Register Policy and Tender forms have been updated to allow gift cards, coupons, and gift certificates as returnable tenders.



Register Policies for Global

☐ Use the same configuration settings for All Store Types

Store Type: Warehouse

Main | Refund / Cash Back | **Tender**

Tender Types Accepted

Order	Tender Type	Allow Sale	Allow Return	Allow Bill Payment	Require Count
1	Coupon	Y	Y	Y	Y
2	Gift Card	Y	Y	Y	Y
3	Gift Certificate	Y	Y	Y	Y

Credit Cards Accepted

☐ American Express  
☐ Diners Club  
☐ Discover  
☐ JCB  
☐ MasterCard  
☐ Visa

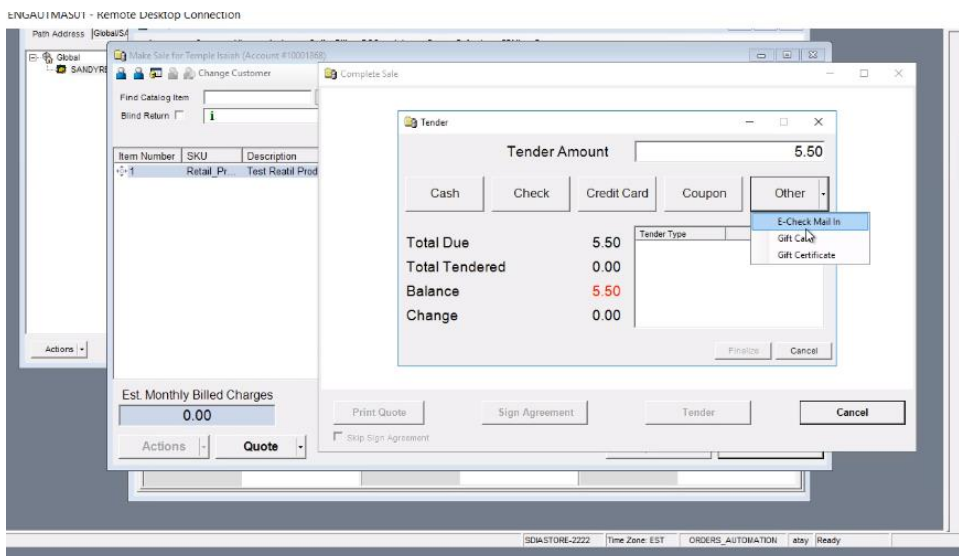
☒ Display CVV Code Field  
☒ Require CVV Code

Voice Referral Authorization

☒ Allow Voice Referral Authorization  
 Custom Voice Authorization Instructions

☐ Prompt for BTA Reference Number  
☐ Require Zip Code

Save Apply Cancel



ENGAUTIMASU1 - Remote Desktop Connection

Path Address: Global

Global

Find Catalog Item

Blind Return

Item Number | SKU | Description

1 | Retail\_P | Test Retail Prod

Actions

Est. Monthly Billed Charges: 0.00

Actions: Quote

Print Quote Sign Agreement Tender Cancel

☐ Skip Sign Agreement

SDA STORE-2222 Time Zone: EST ORDERS AUTOMATION aty Ready

Tender

Tender Amount: 5.50

Cash Check Credit Card Coupon Other

Total Due: 5.50  
 Total Tendered: 0.00  
 Balance: 5.50  
 Change: 0.00

Tender Type

E-Check Mail In  
 Gift Card  
 Gift Certificate

Finalize Cancel