

Core Release Bulletin

***CostGuard Solution
19.7 Release***

July 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 [Resources > Knowledge Center and Resources Help Resources](#).

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	AR 8308	Notification for expired or soon to expire recurring credit card account - Users with <i>Manage Settings</i> permission in Customer Care can enable/disable expired card notifications
Orders	FR 2990	Creating Direct Invoice orders – Charges for designated Direct Invoice products are billed to the account in CostGuard, and carriers can send an invoice for the Direct Invoice products outside the normal bill cycle.
Notifications Management	AR 8234	Viewing and resubmitting Communications-generated notifications in CostGuard Client and Customer Care – This is an enhancement to the initial release of support for Communications-generated notifications provided in 19.6. With the 19.7 release, the ability to view and resubmit these notifications in both the Client and Customer Care will help service reps assist subscribers with questions regarding notifications.
Orders	AR 8328	Restricting actions on child-level SKUs – This lets you prevent unauthorized users from performing disconnect/reconnect actions on child-level SKUs independent of their parent Service or Package. This applies to Customer Management orders in CostGuard Client and to the Orders Web application.
Tickets	FR 3064	Ability to Edit and Replace existing documents – Prior to this release, users could only add and delete documents in Tickets. Now users can edit and replace existing documents.
OnlineBill	FR 3064	Ability to remove unlinked users – Lets admin users clean up records that persist when an OnlineBill user is deleted in SaaS Security, but the associated record in the UserCustomer table is not removed.
	AR 8453	Preventing customers from turning off Autopay – A new setting for Enforce Autopay lets you prevent customers from turning off Autopay. The setting defaults to False , meaning customers will be permitted to toggle this setting by default.
Communications	AR 8457	Ability to send treatment e-mails to billing contacts (previously the only option was to send to the primary contact).
Address Validation	FR 3053	Update USPS Address Validation DLLs (provided in a V19.6 service pack) – Current DLLs will stop working as of 8/8/19.
Process Automation	AR 8347	Monitor background payment processing – This provides a Trigger to log data such as records processed, skipped, etc for background payment processes. The HTTP Action to send information and email notifications from Communications can be configured to consume the Trigger.
Payment Processing	AR 8403	Payment Account Transaction Created Trigger added to CostGuard Client to include firing the trigger when E-Pay runs as part of a bill run.
Retail Installment Plans	AR 8436	Down Payment Amount field supports decimal (currency) values – Allows entry of a 2-decimal value (e.g. 12.25) rather than restricting the entered amount to an integer.
Customer Management	AR 8333	Avoid double-billing on reconnect orders – This is to help avoid double-billing charges on reconnecting a service or package when it has products configured to not credit on disconnect.

1.2 RESOLVED KNOWN ISSUES

The following known issues have been resolved in this release.

Functional Area	PR	Description
Customer Care	83040	(Applies to Tickets as well) – System was not limiting the Journal Type/Follow Up type drop downs to only display User Defined JournalTypelds (JournaTypeld > 1000). System defined journal types should not be available to select. Updated the drop down for Journal Type, Follow-up Type, Ticket Type to only include values where the ID is > 1000.
Tickets	83040	See above
	83062	Added Ability to delete Documents from a Ticket
Rating & Billing	83045	Fixed logic so that COUNTY level tax is applied when the CITY level tax Includes County = TRUE and and CITY and COUNTY are both in the same jurisdiction.
	83046	Updated the Rate Bill XML Invoice operation for <i>Remit To</i> and <i>Payer</i> address information to no longer send a carriage return (new line character). Carriage returns are replaced with a space.
OnlineBill	83051	Added ability to remove single users from OnlineBill that were previously removed from Security.
Retail Installment Plans	83098	Improved Installment Plan Processing Performance
Workflow	83043	Updated the logic that saves extended data on the Sub-workflow page to no longer save a change to the Key Name as new extended data. If an extended data item key on the modify sub-workflow page is modified, the extended data item is removed and then re-added.
	83058	Fix made to prevent View-Only user from applying Bulk Update <ul style="list-style-type: none"> Bulk Updates to workflows require <i>Manage Workflow Instance</i> permission Bulk Updates to tasks require the <i>Manage Tasks (Basic)</i> or <i>Manage Tasks (Advanced)</i> permission
	83075	Updated the Workflow Bulk Update page so that when the Group is edited, the User must also be edited.
	83077	Fixed Splitter Step Configuration Page so that sub-workflow extended information is saved correctly for steps with multiple groupings.
	83083	Updated the Workflow Definition page so that editing a definition from the search results grid no longer causes the window to hang with a Processing dialog when the user clicks Save .
	83084	Fixed issue searching for group members on Splitter Configuration Page in Workflow.

2 Notification for Expiring Credit Card Account

There is a new setting in Customer Care to enable/disable expired or expiring recurring card notifications. The setting creates two Workflow triggers – Recurring Trigger and E-Pay Account Modified - to send the notification per user-specified parameters. The setting requires *Manage Settings* permission in Customer Care.

Triggers

Name: Trigger: From Last Modified:
 Enabled: Action: To Last Modified:
 Last modified by:
[Create Trigger](#) [View History](#) SEARCH

Name ^	Trigger	Action	Last Modified	Last modified by
✓ [System Close Ticket from Email] ...	Message Created	Modify Ticket	09/25/2018 5:17 PM	asul
✓ [System CPNI] Contact CPNI Han...	CPNI Information Updated	Handle Contact CPNI Compliance	03/29/2019 2:13 PM	idi_deployment_user
✓ [System CPNI] Customer CPNI PI...	CPNI Information Updated	Send CPNI PIN Notification	03/29/2019 2:13 PM	idi_deployment_user
✓ [System CPNI] Customer Modifie...	CPNI Information Updated	Handle Customer CPNI Complian...	03/29/2019 2:13 PM	idi_deployment_user
✓ [System Credit Cards] Identify Ex...	Recurring Trigger	Mark Expiring Credit Cards	07/03/2019 9:40 AM	TFOR
✓ [System Credit Cards] Send Expi...	E-Pay Account Modified	Send Notification	07/03/2019 9:40 AM	TFOR
✓ [System Email On Assignment] Ti...	Ticket Created	Send Communications Message	03/08/2018 6:11 PM	asul
✓ [System Email On Reassign] Ticke...	Ticket Modified	Send Message From Template	09/28/2017 6:30 PM	asul
✓ [System E-Pay Auto P...		Send Notification	07/02/2019 4:50 PM	TFOR
			07/02/2019 4:50 PM	TFOR

Recurring Trigger

Scheduling Start and Stop Configuration

Start Date* 07/03/2019 End Date

Scheduling Pattern Configuration

Occurs* Weekly

Every* 1 Week(s)

On* ☐ Sunday ☒ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday

At* 9:30 AM America/New York (-04:00)

Mark Expiring Credit Cards

Parameters

Notify Months i... 2

Days Before Re-s...* 14

Months After Ex...* 1

Customer Accou...

Customer Accou...

E-Pay Account Modified

Filters

All of the following rules:

Exp <> @[ExpirationNotificationRequestedDate]

Exp <>

Send Notification

Parameters

Template Name* Expired Credit Card Notification

Type* other

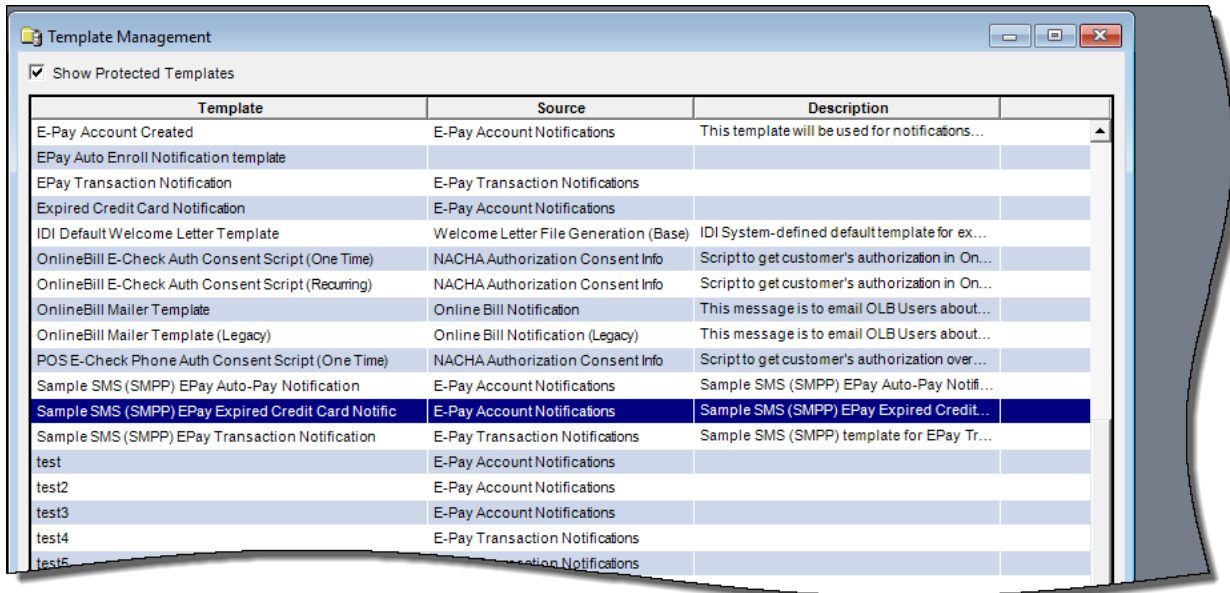
ObjectID* @[PaymentAccountID]

Delivery Type* email

2.1 SETUP

2.1.1 CLIENT-BASED NOTIFICATION TEMPLATE

Set up the notification template in CostGuard Client Template Management. There is a new protected template called *Sample SMS (SMPP) Expired Credit Card Notification*.



Template	Source	Description
E-Pay Account Created	E-Pay Account Notifications	This template will be used for notifications...
E-Pay Auto Enroll Notification template		
E-Pay Transaction Notification	E-Pay Transaction Notifications	
Expired Credit Card Notification	E-Pay Account Notifications	
IDI Default Welcome Letter Template	Welcome Letter File Generation (Base)	IDI System-defined default template for ex...
OnlineBill E-Check Auth Consent Script (One Time)	NACHA Authorization Consent Info	Script to get customer's authorization in On...
OnlineBill E-Check Auth Consent Script (Recurring)	NACHA Authorization Consent Info	Script to get customer's authorization in On...
OnlineBill Mailer Template	Online Bill Notification	This message is to email OLB Users about...
OnlineBill Mailer Template (Legacy)	Online Bill Notification (Legacy)	This message is to email OLB Users about...
POSE-Check Phone Auth Consent Script (One Time)	NACHA Authorization Consent Info	Script to get customer's authorization over...
Sample SMS (SMPP) EPay Auto-Pay Notification	E-Pay Account Notifications	Sample SMS (SMPP) EPay Auto-Pay Notif...
Sample SMS (SMPP) EPay Expired Credit Card Notification	E-Pay Account Notifications	Sample SMS (SMPP) EPay Expired Credit...
Sample SMS (SMPP) EPay Transaction Notification	E-Pay Transaction Notifications	Sample SMS (SMPP) template for EPay Tr...
test1	E-Pay Account Notifications	
test2	E-Pay Account Notifications	
test3	E-Pay Account Notifications	
test4	E-Pay Transaction Notifications	
test5	E-Pay Transaction Notifications	

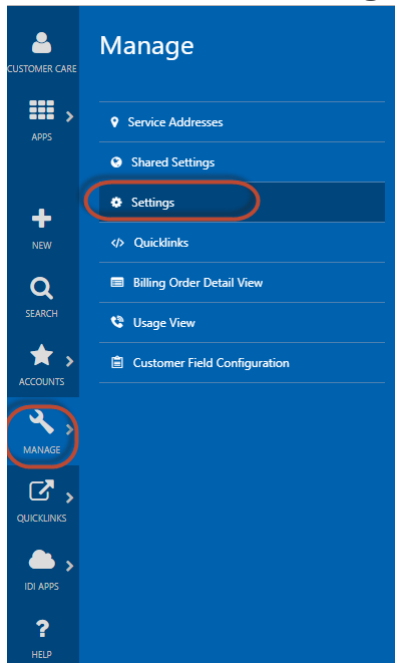
Make a copy of this template and set it up as needed. You'll select this template when you enable the *send expired card notifications* functionality in Customer Care. This template includes the following information:

- customer name
- account number
- last 4 digits of card that either has or will soon expire
- month/year card expires
- generic 1-800 number (carrier to override)
- generic website address (carrier to override)
- Text advising them to either log into their OnlineBill account to update their card expiration date or call the 1-800 number to update

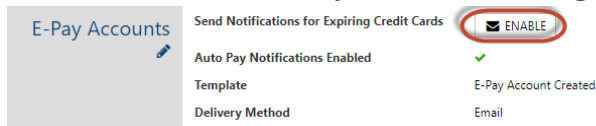
2.1.2 ENABLING EXPIRED CREDIT CARD NOTIFICATION IN CUSTOMER CARE

To enable this functionality:

- Go to **MANAGE** > **Settings** in Customer Care.



- Scroll down to the *E-Pay Accounts* setting and click **ENABLE**.



- This displays a dialog for entering notification parameters. Defaults are shown below.

Configure Expiring Credit Card Notifications

Template Name*

Please Select ...

Delivery Type*

Months in Advance to Notify*

2

Wait Day(s) Before Resending*

14

Months After Expiration to Run*

1

Account Type

All

Frequency*

Account Status

All

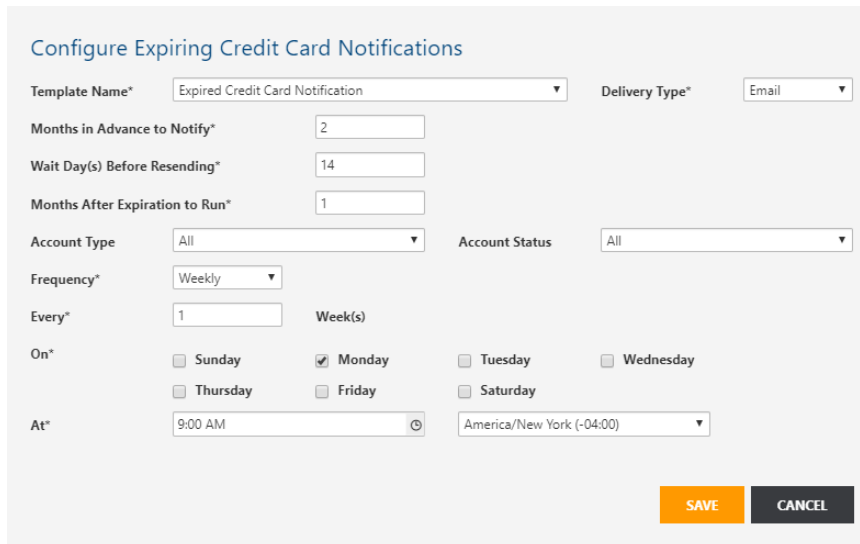
At*

America/New York (-04:00)

SAVE

CANCEL

- In the *Template Name* drop down, select the *Expired Credit Card Notification* template you created in CostGuard Client. Then set up the other parameters as described below.



Configure Expiring Credit Card Notifications

Template Name* Delivery Type*

Months in Advance to Notify*

Wait Day(s) Before Resending*

Months After Expiration to Run*

Account Type Account Status

Frequency*

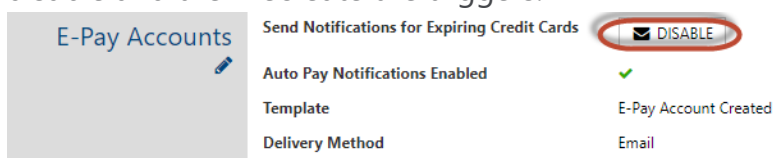
Every* Week(s)

On* ☐ Sunday ☒ Monday ☐ Tuesday ☐ Wednesday
☐ Thursday ☐ Friday ☐ Saturday

At*

SAVE **CANCEL**

- Delivery Type** (Email, SMS_SMTP, SMS_SMPP)
 - Months in Advance to Notify** (default = 2) – You may enter blank or zero to not notify until expiration has been reached.
 - Wait Days Before Resending** (default = 14) - Continue to send every *n* days until the E-Pay account becomes valid or is no longer active
 - Months After Expiration to Run** (default = 1) - Null not allowed (can't set up to notify indefinitely on an expired card)
 - Account Type** (default = all)
 - Account Status** (default = All with Billing Status of Billing). (Filtered list of Account Statuses that are billing active)
 - Frequency** (Daily, Weekly, Monthly) - Dynamic parameters based on the Frequency selected
 - At** (Time) and Time Zone - default to browser's time zone
- Click **SAVE**. This creates the triggers in Workflow and changes the **ENABLE** button to **DISABLE**. This lets you remove the triggers if needed. **Note:** Once enabled, you cannot edit the parameters. If you need to edit, you'll need to disable and then recreate the triggers.



E-Pay Accounts

Send Notifications for Expiring Credit Cards ☒ **DISABLE**

Auto Pay Notifications Enabled ☒

Template E-Pay Account Created

Delivery Method Email

3 Orders – Direct Invoicing

Direct Invoicing is for CostGuard users who need to immediately bill an account for a purchase when they prefer not to wait for bill cycle invoicing. The functionality available in this release provides the ability to:

- Set up products in the Product Catalog for Direct Invoicing
- Add Direct Invoicing products to an Order in the Orders web application
- Bill to Account in CostGuard for Direct Invoicing products. Subsequently, carriers can send an invoice for the Direct Invoicing products outside the normal bill cycle.

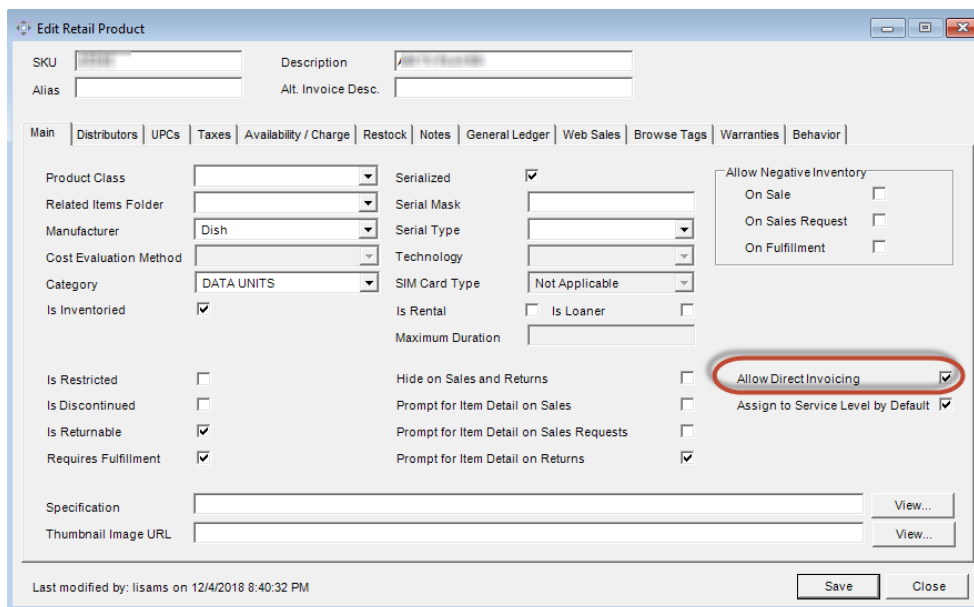
3.1 NEW PERMISSION

The new **Allow Direct Invoicing** permission is required to use this functionality in your system. This permission is associated to the *Orders Admin* role by default and may be added to other roles as applicable.

3.2 SETUP

3.2.1 SETTING UP DIRECT INVOICING PRODUCTS IN THE PRODUCT CATALOG

Any items that you intend to invoice directly must be configured in the Product Catalog. Add these items as Retail Products and check the **Allow Direct Invoicing** checkbox. This makes the product available for selection in Orders *if* Direct Invoicing is enabled in your system as described below.

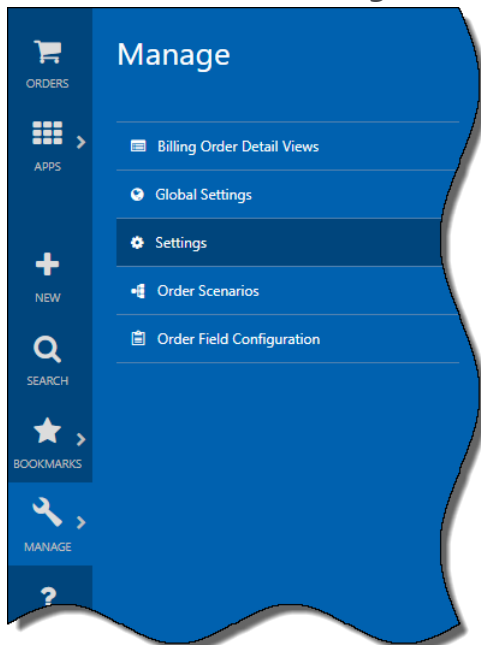


3.2.2 ENABLING DIRECT INVOICING IN ORDERS

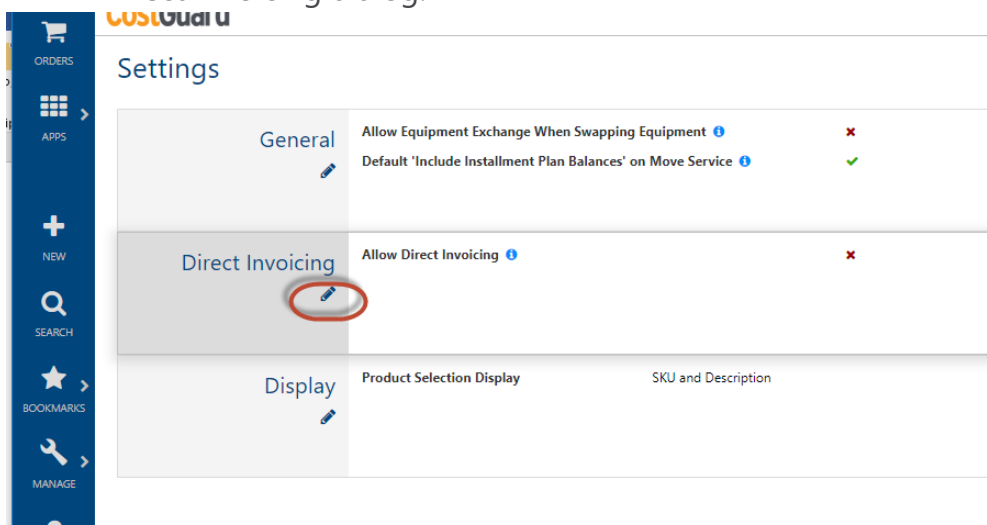
A new setting is available in Orders to enable the Direct Invoicing functionality. This will require you to enter contact information and establish a tax jurisdiction as required to complete the direct invoicing transaction. **Note:** Do not enable this setting unless you intend to use this functionality.

To enable this setting, in the Orders application:

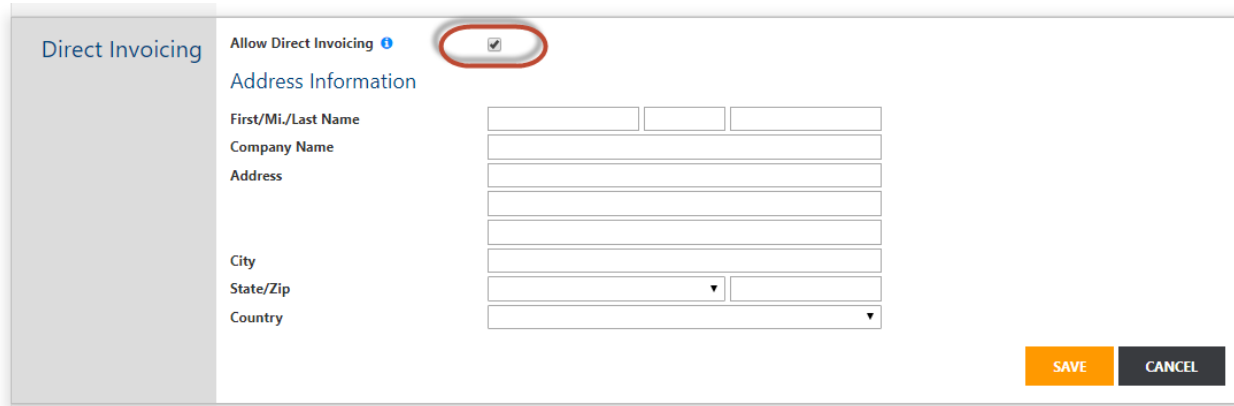
- Select **MANAGE** > **Settings**



- In the new Direct Invoicing section click the Edit (pencil) icon to display the Allow Direct Invoicing dialog.



- Check the **Allow Direct Invoicing** checkbox.



Direct Invoicing

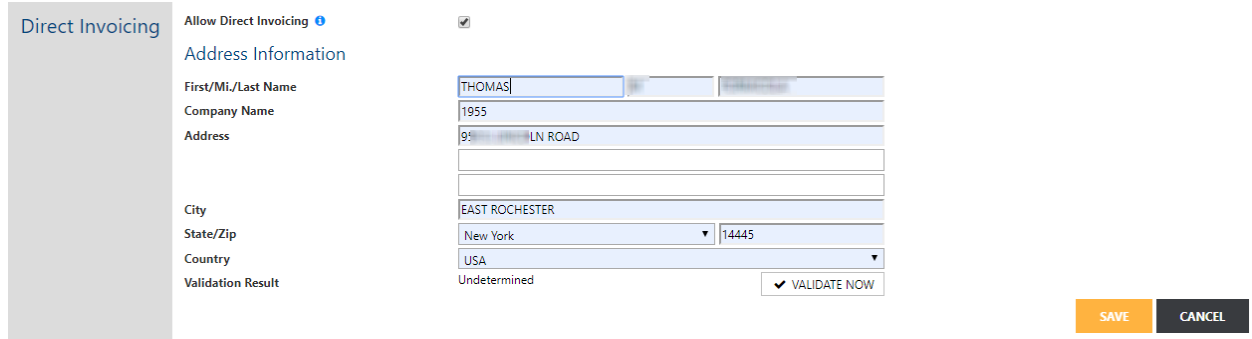
Allow Direct Invoicing ☒

Address Information

First/Mi./Last Name
Company Name
Address
City
State/Zip
Country

SAVE **CANCEL**

- Enter and validate the Contact address information to establish the tax jurisdiction for Direct Invoicing orders.



Direct Invoicing

Allow Direct Invoicing ☒

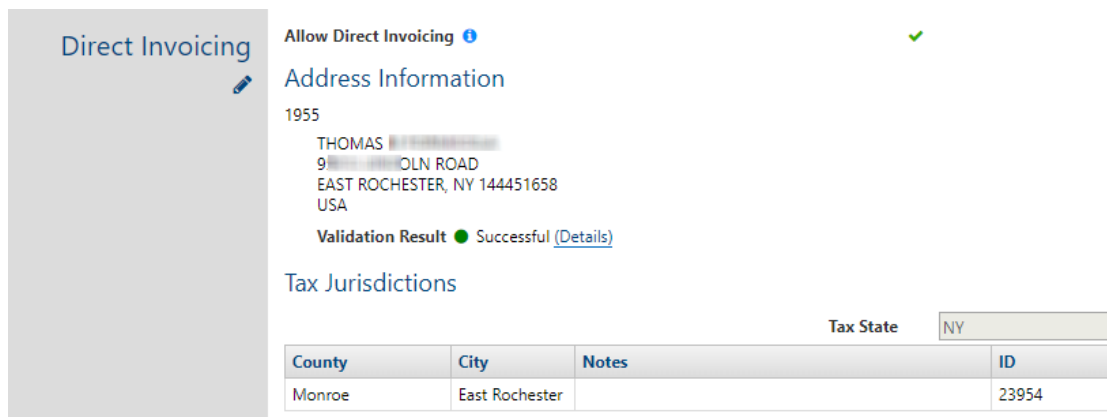
Address Information

First/Mi./Last Name: THOMAS
Company Name: 1955
Address: 95 OLN ROAD
City: EAST ROCHESTER
State/Zip: New York 14445
Country: USA
Validation Result: Undetermined

VALIDATE NOW

SAVE **CANCEL**

- The Tax Jurisdiction information is auto-populated on saving the validated address information.



Direct Invoicing

Allow Direct Invoicing ☒

Address Information

1955
THOMAS
95 OLN ROAD
EAST ROCHESTER, NY 144451658
USA
Validation Result: ● Successful [\(Details\)](#)

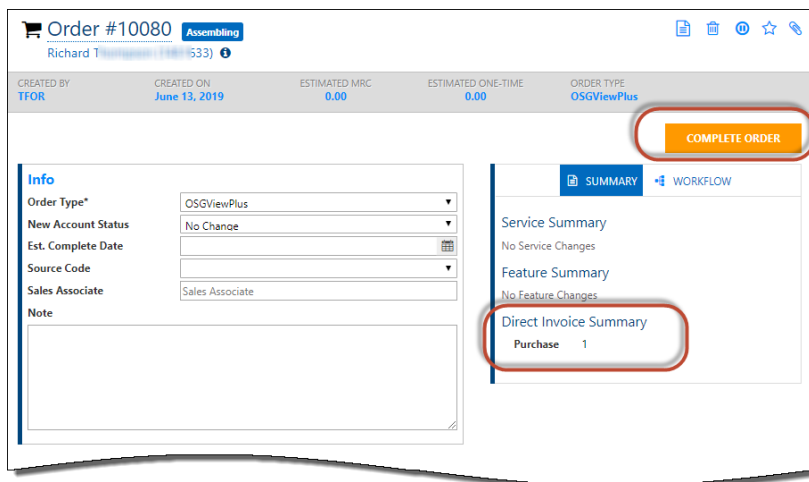
Tax Jurisdictions

Tax State: NY

County	City	Notes	ID
Monroe	East Rochester		23954

3.3 CREATING A DIRECT INVOICING ORDER

When Direct Invoicing is enabled, any products that you've set up in the Product Catalog as *Allow Direct Invoicing* will be available for selection for users with *Allow Direct Invoicing* permission. The Order process is similar to any other Order, except that when the Order includes a Direct Invoicing item, there is an intermediate step before you can submit the Order. When you move from the *assembling* phase on Order Details to the *review and submit* phase on the Order Summary (by clicking **REVIEW ORDER**), you'll see a **COMPLETE ORDER** button. This button is only present when the order includes one or more Direct Invoicing items (as indicated in the *Direct Invoice Summary* section).



Order #10080 **Assembling**
Richard T. Thompson (145-533)

CREATED BY: TFOR | CREATED ON: June 13, 2019 | ESTIMATED MRC: 0.00 | ESTIMATED ONE-TIME: 0.00 | ORDER TYPE: OSGViewPlus

COMPLETE ORDER

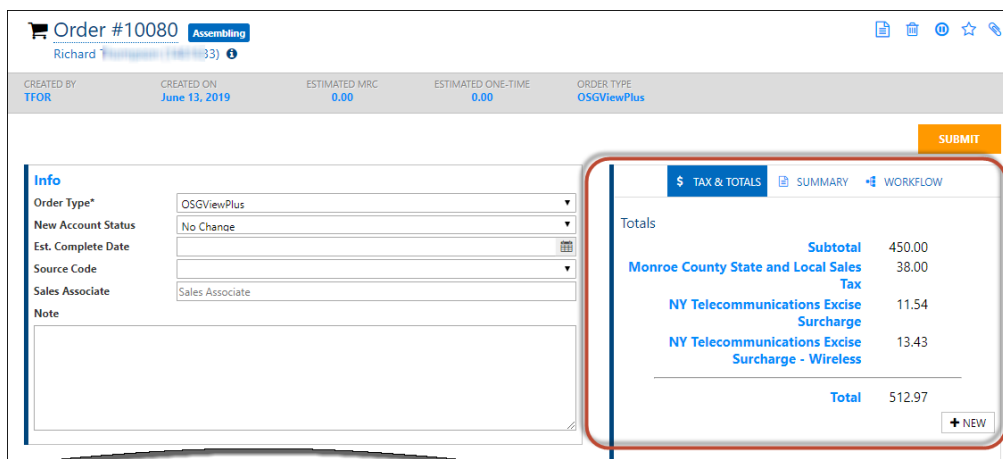
Info

Order Type*: OSGViewPlus
New Account Status: No Change
Est. Complete Date:
Source Code:
Sales Associate: Sales Associate
Note:

SUMMARY | **WORKFLOW**

Service Summary
No Service Changes
Feature Summary
No Feature Changes
Direct Invoice Summary
Purchase: 1

Clicking **COMPLETE ORDER** displays a **TAX & TOTALS** tab on the Order Summary. This tab shows all charges related to Direct Invoicing items on the Order.



Order #10080 **Assembling**
Richard T. Thompson (145-533)

CREATED BY: TFOR | CREATED ON: June 13, 2019 | ESTIMATED MRC: 0.00 | ESTIMATED ONE-TIME: 0.00 | ORDER TYPE: OSGViewPlus

SUBMIT

Info

Order Type*: OSGViewPlus
New Account Status: No Change
Est. Complete Date:
Source Code:
Sales Associate: Sales Associate
Note:

TAX & TOTALS | **SUMMARY** | **WORKFLOW**

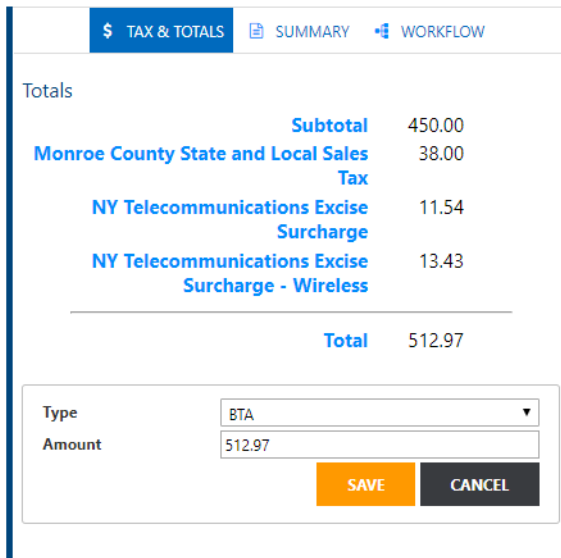
Totals

Subtotal	450.00
Monroe County State and Local Sales Tax	38.00
NY Telecommunications Excise Surcharge	11.54
NY Telecommunications Excise Surcharge - Wireless	13.43
Total	512.97

+ NEW

Use this tab to *add* a line for the amount to be Billed to Account (BTA).

- Click **+NEW**. This displays the *Type* and *Amount* fields.
 - Type defaults to **BTA** and cannot be edited.
 - Amount defaults to the total charge and taxes for all Direct Invoicing items included in this Order. **Do not** edit this amount as the system will not let you submit the Order unless this amount is equal to the total charge and taxes for Direct Invoicing items.



The screenshot shows the 'TAX & TOTALS' tab with a totals table and a form to add a BTA line.

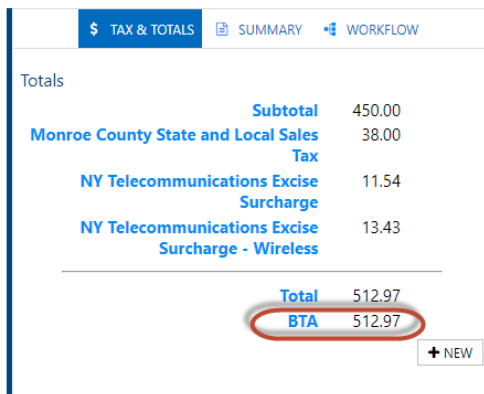
Totals		
	Subtotal	450.00
Monroe County State and Local Sales Tax		38.00
NY Telecommunications Excise Surcharge		11.54
NY Telecommunications Excise Surcharge - Wireless		13.43
Total		512.97

Type:

Amount:

SAVE **CANCEL**

- Click **SAVE**. This adds a line for BTA amount under the Total.



The screenshot shows the 'TAX & TOTALS' tab with the BTA line added to the totals table.

Totals		
	Subtotal	450.00
Monroe County State and Local Sales Tax		38.00
NY Telecommunications Excise Surcharge		11.54
NY Telecommunications Excise Surcharge - Wireless		13.43
Total		512.97
BTA		512.97

+ NEW

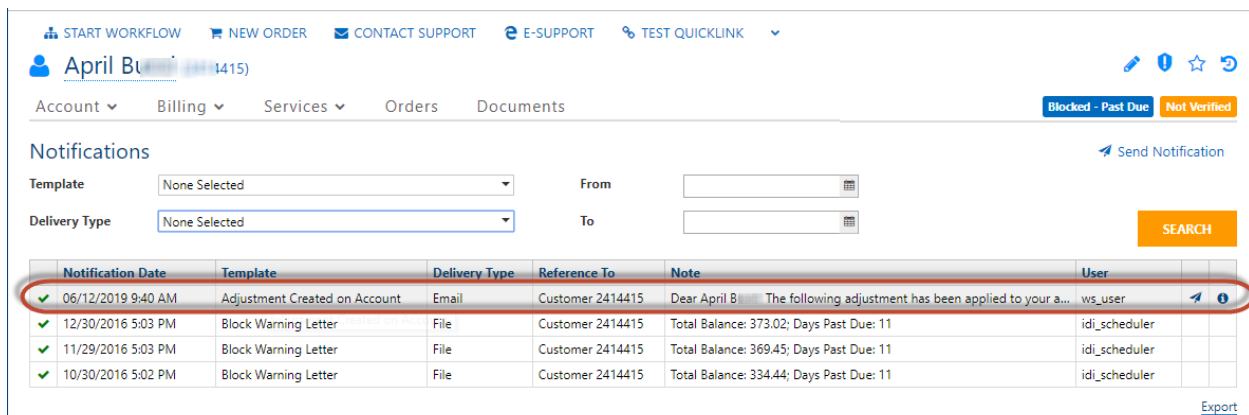
- At this point you can submit the Order. The indicated BTA amount will be billed to the account in CostGuard. Subsequently, carriers can send an invoice for the Direct Invoicing products outside the normal bill cycle.

4 Viewing Communications Notifications

CostGuard Cient and Customer Care have been enhanced to support viewing and resubmitting Communications-generated notifications. Previously, this functionality was only available for CostGuard-generated notifications.

4.1 CUSTOMER CARE

When viewing an account in Customer Care, the **Account > Notifications** page will include Communications-generated notifications when applicable. All Communication notifications will have the *Email* Delivery Type. The grid columns have not changed. Communications notifications are displayed in the same format as CostGuard Notifications.

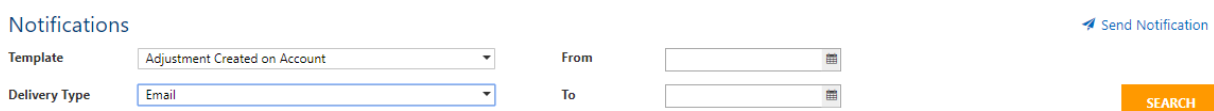


Notification Date	Template	Delivery Type	Reference To	Note	User
06/12/2019 9:40 AM	Adjustment Created on Account	Email	Customer 2414415	Dear April B... The following adjustment has been applied to your a...	ws_user
12/30/2016 5:03 PM	Block Warning Letter	File	Customer 2414415	Total Balance: 373.02; Days Past Due: 11	idi_scheduler
11/29/2016 5:03 PM	Block Warning Letter	File	Customer 2414415	Total Balance: 369.45; Days Past Due: 11	idi_scheduler
10/30/2016 5:02 PM	Block Warning Letter	File	Customer 2414415	Total Balance: 334.44; Days Past Due: 11	idi_scheduler

4.1.1 SEARCH ENHANCEMENTS

Search functionality on this page has been enhanced to support Communication notifications:



- **Template:** The Template dropdown menu includes Communications template names as applicable to let you search for Communications notifications. This menu continues to support multi-select.
- **Delivery Type:** Selecting **Email** Delivery Type will return both Communications notifications, and CostGuard notifications that were sent as Email. This menu continues to support multi-select.





4.1.2 VIEWING AND RESUBMITTING OPTIONS

Hovering over the far right columns displays icons for viewing and resubmitting notifications.

SEARCH

Note	User		
5 Dear April 8 The following adjustment has been applied to your a...	ws_user		
5 Total Balance: 373.02; Days Past Due: 11	idi_scheduler		
5 Total Balance: 360.45; Days Past Due: 11	idi_scheduler		

This applies to both Communications and CostGuard notifications:

- **Resubmit:** Click the  icon in the column 2nd from the right.
 - The original notification that was resubmitted will have a  displayed in the far left column.
 - A new row will appear in the grid for the new notification created when resubmitting.





Notifications


Template None Selected

Delivery Type None Selected

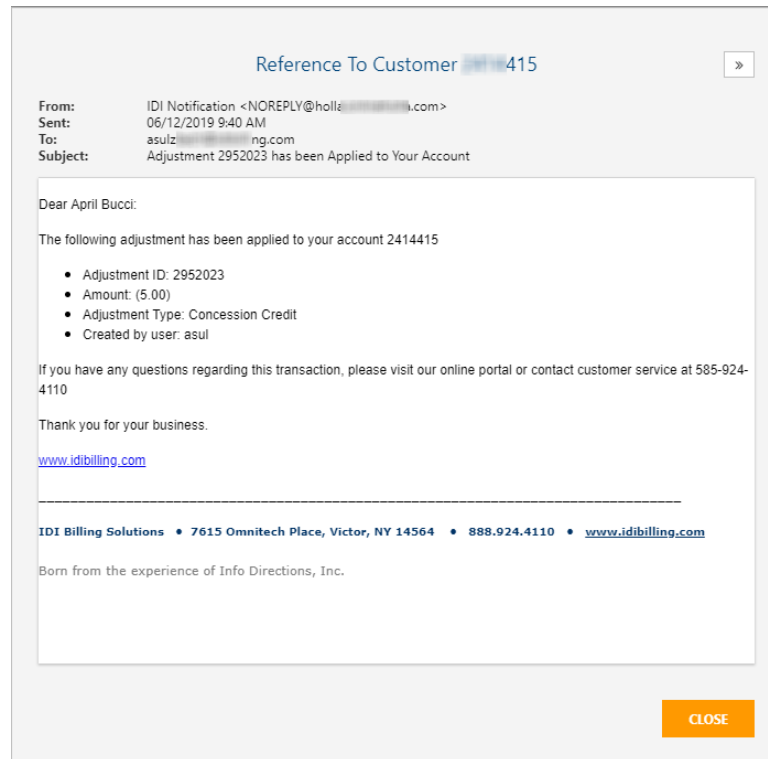
From

To

	Notification Date	Template	Delivery Type	Reference To	Note
	06/12/2019 10:27 AM	Adjustment Created on Account	Email	Customer 2414415	Dear April 8
	06/12/2019 9:40 AM	Adjustment Created on Account	Email	Customer 2414415	Dear April 8
	12/30/2016 5:03 PM	Block Warning Letter	File	Customer 2414415	Total Balance:
	11/29/2016 5:03 PM	Block Warning Letter	File	Customer 2414415	Total Balance:
			File	Customer 2414415	Total Balance:

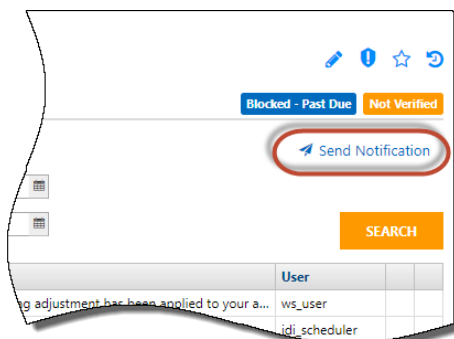
- **View Details:** Click the  in the far right column.
 - This opens a dialog with the contents of the notification sent, including the *to* and *from* email address and the subject of the email.

Example:



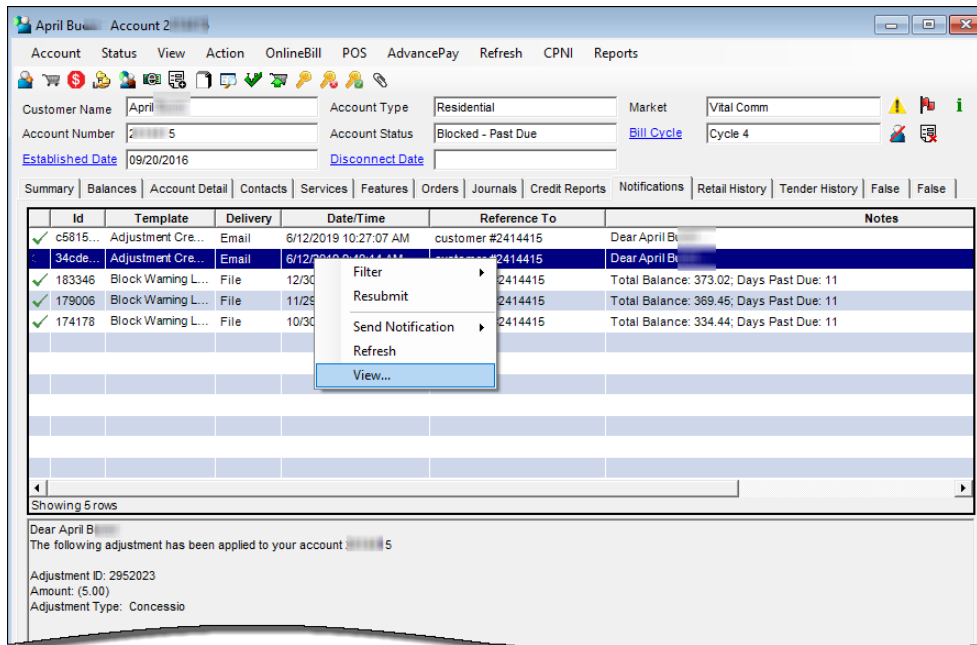
4.1.3 SEND NOTIFICATION

The **Send Notification** option at the top right corner of the page only supports sending CostGuard notifications for a customer account. This **cannot** be used to send Communications notifications.

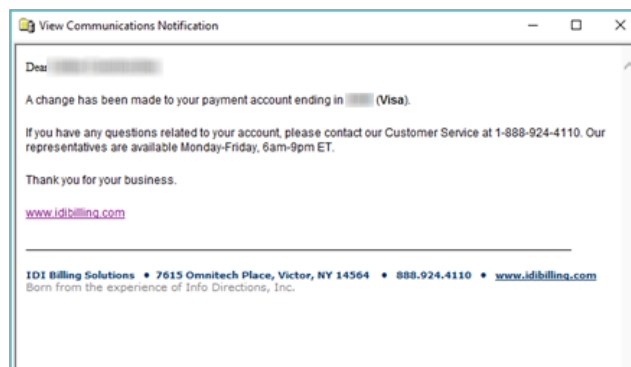


4.2 COSTGUARD CLIENT

When viewing an account in CostGuard Client, the **Notifications** tab will include Communications notifications when applicable. All Communication notifications will have the *Email* Delivery Type. Note that this Delivery Type (among other Delivery Types) can also be applicable for CostGuard-generated notifications.

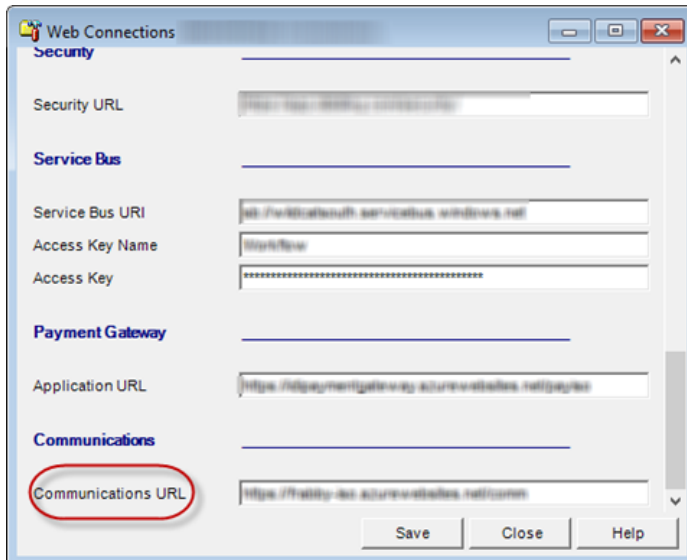


The context (right-click) menu for Communications-generated notifications provides an option to view the notification in a separate window. The View option is disabled for CostGuard-generated notifications.



You can resubmit both Communications- and CostGuard-generated notifications by right-clicking and choosing **Resubmit** from the context menu.

Note: For Communications Notifications to be viewable in CostGuard Client, the Communications URL needs to be populated in the *Web Connections* section in Configuration Console. This setting is not available to CostGuard users and must be set by an IDI associate by request (Service Order).



Web Connections

Security

Security URL:

Service Bus

Service Bus URI:

Access Key Name:

Access Key:

Payment Gateway

Application URL:

Communications

Communications URL:

Save Close Help

5 Restricting Actions on Child-level SKUs

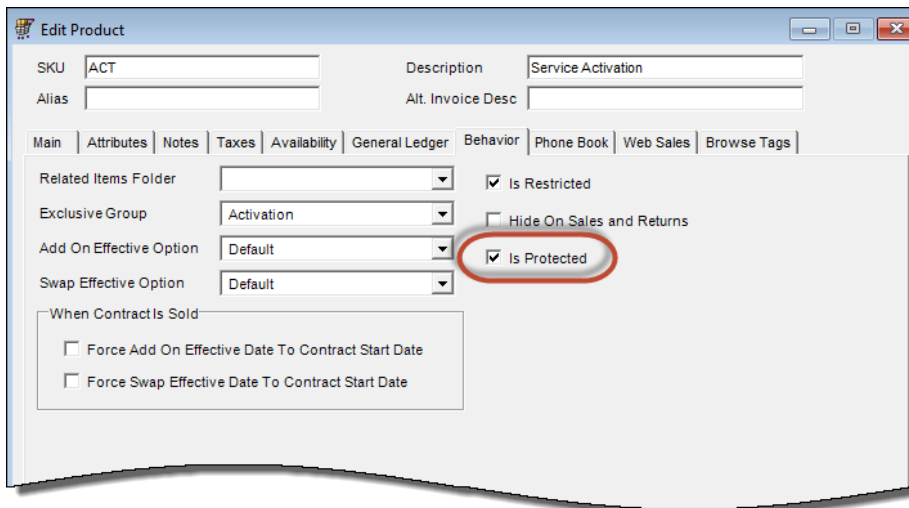
This lets you restrict unauthorized service representatives from performing disconnect/reconnect actions on designated child-level SKUs independent of their parent Service or Package. This functionality applies when managing SKUs both in CostGuard Client and the Orders web application.

The functionality is applied on two levels – Product Catalog setup and Permissions. Through Product Catalog configuration you can mark selected SKUs as *Is Protected*. When a SKU is marked as *Is Protected*, users will not be permitted to perform disconnect/reconnect actions on the SKU independent of the parent Service or Package. Protected SKUs can only be disconnected or reconnected when the action is applied at the Service (or parent) level.

Through user permission profiles you can grant certain users the ability to override this setting and perform disconnect/reconnect actions directly on protected SKUs.

5.1 MARKING PRODUCTS AS IS PROTECTED

There is a new *Is Protected* check box on the Behavior tab of the Add/Edit dialog for Products and Packages.



The screenshot shows the 'Edit Product' dialog box with the 'Behavior' tab selected. The 'Is Protected' checkbox is checked and circled in red. Other visible fields include SKU (ACT), Description (Service Activation), and various other configuration options.

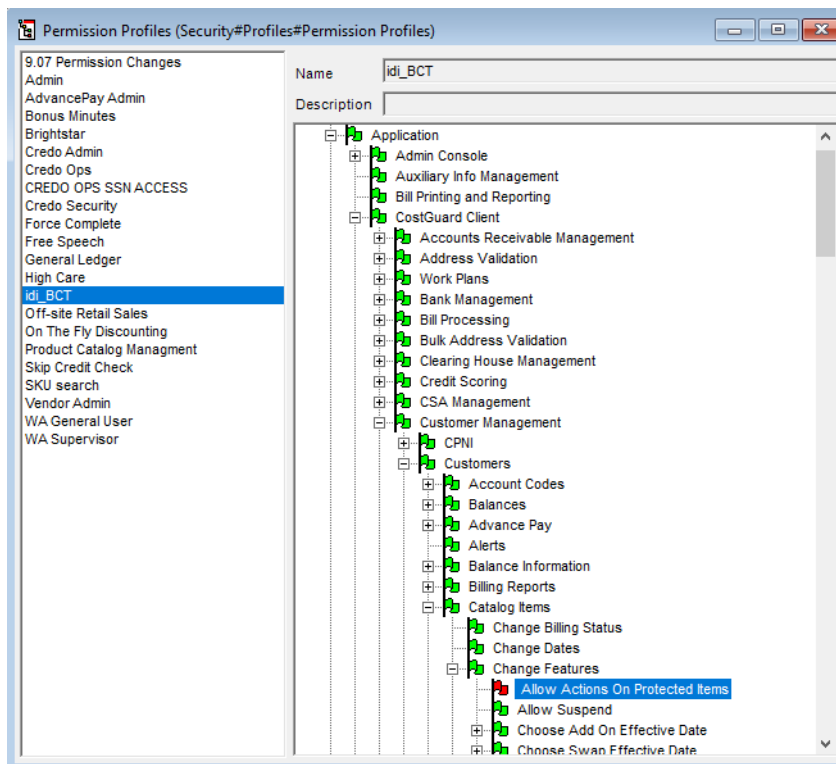
Note: When you choose to protect a Package, items within the Package must also be individually marked as *Is protected* if you intend to protect them.

5.2 GRANTING USERS THE ABILITY TO OVERRIDE IS PROTECTED STATUS

This is done via a new permission – *Allow Actions On Protected Items*.

5.2.1 COSTGUARD CLIENT PERMISSION

For CostGuard Client users this is part of their permission profile configured via Admin Console – Security. The path is Application > CostGuard Client > Customer Management > Customer > Catalog Items > Change Features.



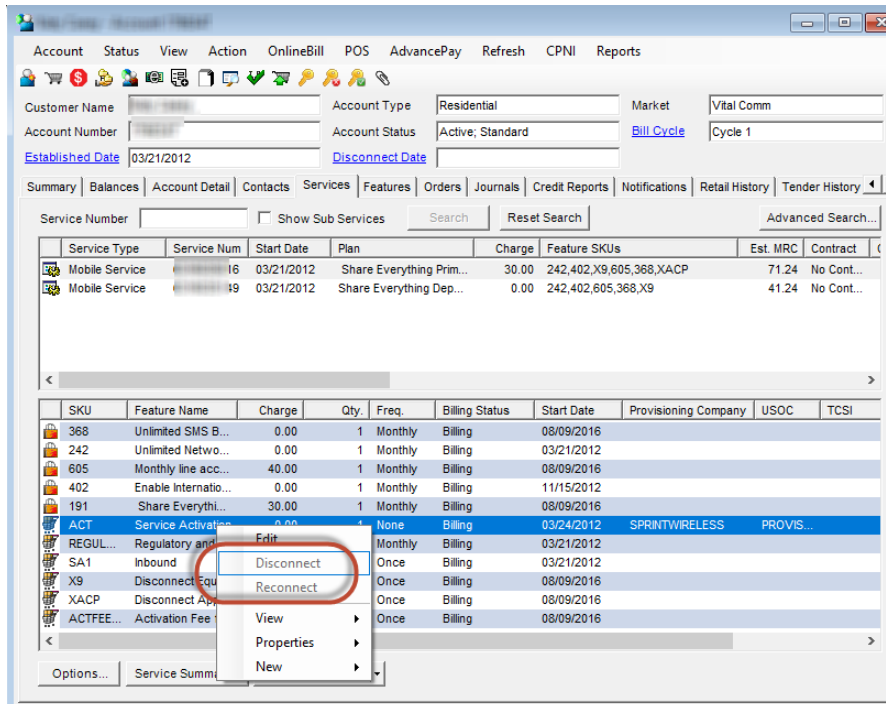
5.2.2 ORDERS WEB APP PERMISSION

The *Allow Actions On Protected Items* permission is also available in the web-based Security module to support the Orders web application. **Note:** It is not assigned to *any* Role by default (including Orders Admin). If you intend to grant certain users the ability to override the *Is Protected* setting in Orders, it is recommended that you create a new role specifically for this purpose and then assign this permission to the role.

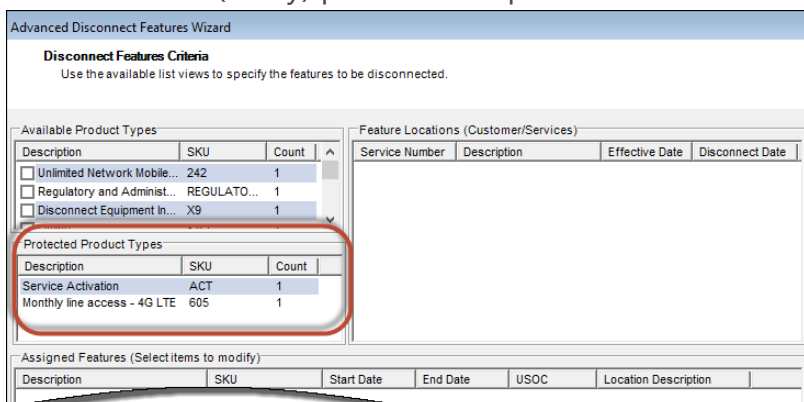
5.3 ENFORCING IS PROTECTED STATUS

5.3.1 COSTGUARD CLIENT

In CostGuard Client, if you do not have the *Allow Actions On Protected Items* permission enabled in your profile, Disconnect/Reconnect will be disabled for all protected SKUs. Users with that permission enabled will be able to Disconnect/Reconnect the SKU independent of its associated Service or parent Package.

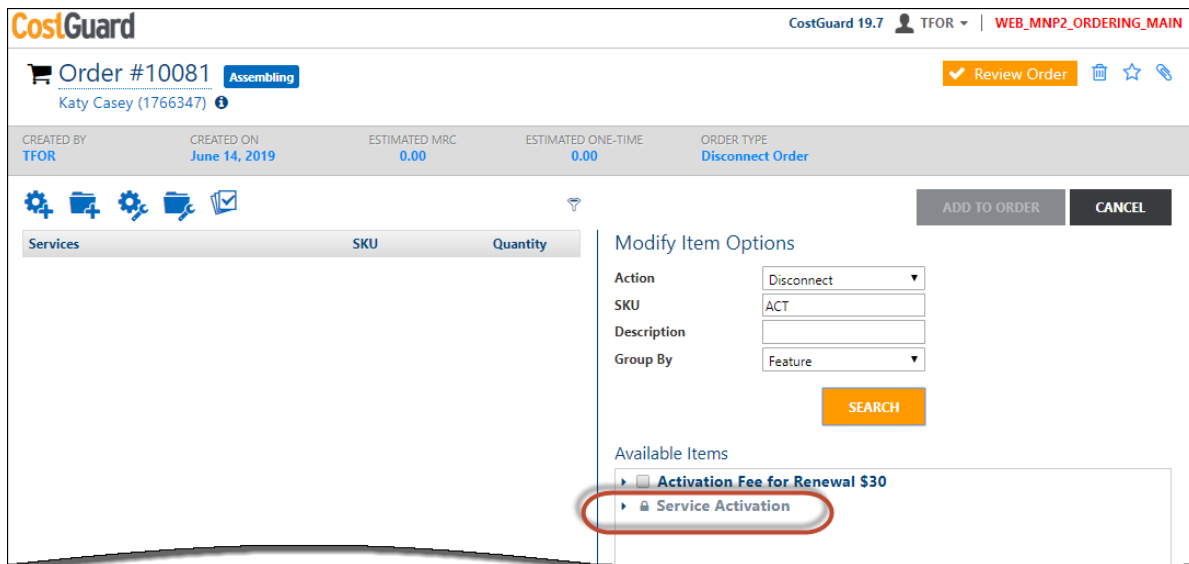


Note: When using an Advanced Wizard for disconnect or reconnect, the wizard will indicate which (if any) products are protected.



5.3.2 ORDERS WEB APP

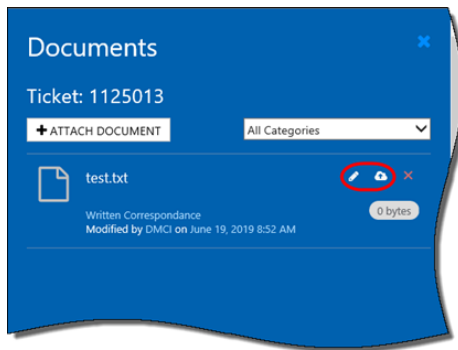
In Orders, if you do not have the *Allow Actions On Protected Items* permission included in one of your assigned roles, any protected SKUs will be presented as locked and you will not be permitted to perform disconnect/reconnect actions on it.



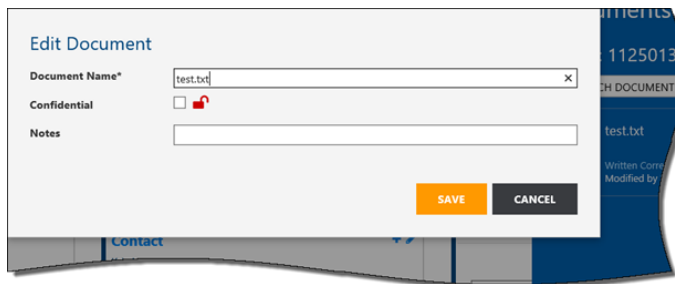
The screenshot shows the CostGuard 19.7 web application interface. At the top, the header includes the CostGuard logo, version 19.7, user TFOR, and the page title WEB_MNP2_ORDERING_MAIN. Below the header, the order details for Order #10081 are displayed, including the customer name Katy Casey (1766347) and the status Assembling. A navigation bar shows the order type as Disconnect Order. The main content area is divided into two sections: a table for Services and a Modify Item Options section. The Services table has columns for Services, SKU, and Quantity. The Modify Item Options section includes fields for Action (Disconnect), SKU (ACT), Description, and Group By (Feature), along with a SEARCH button. Below this, the Available Items section lists two items: Activation Fee for Renewal \$30 and Service Activation. The Service Activation item is highlighted with a red circle, indicating it is a protected item that cannot be modified.

6 Editing and Replacing Documents in Tickets

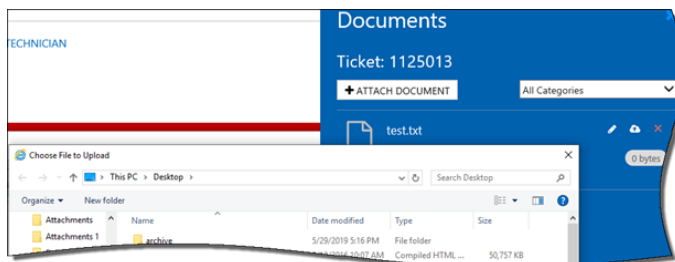
Prior to this release, users could only add and delete documents in Tickets. Now users can edit and replace existing documents.



Edit lets you change the Document Name, Confidentiality, and notes.



Replace opens a dialog for selecting a replacement file.

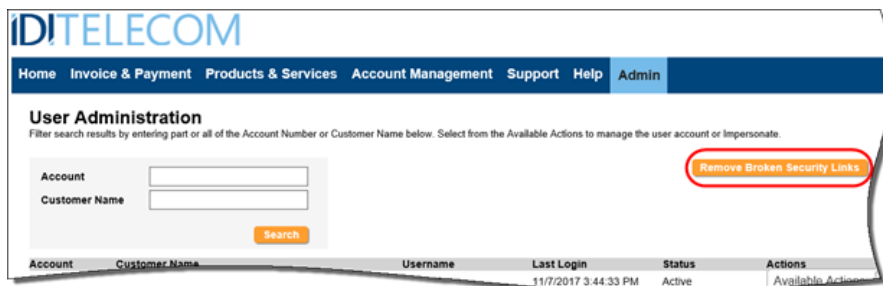


7 OnlineBill

7.1 REMOVING UNLINKED USERS

OnlineBill users have two records in CostGuard - one in SaaS Security and one in the UserCustomer table in the Core database (to let them log in to OnlineBill). When a user is deleted in SaaS Security, the associated record in the UserCustomer table is not removed due to technical limitations. This causes display issues on the OnlineBill User Administration screen. This release adds functionality to let an admin clean up these records and avoid the display issues.

On the user administration page there is a button that when selected cleans up / removes the unlinked users.



Example of an unlinked user that needs to be removed:



7.2 PREVENTING CUSTOMERS FROM TURNING OFF AUTOPAY

A new setting for *Enforce Autopay* lets you prevent customers from turning off Autopay. The setting defaults to **False**, meaning customers are permitted by default to toggle the Autopay setting. You will have to set an environment or Market override to **True** to disallow toggling Autopay.

Payments		
Setting	Default value	Environment Override
Allow Checking Accounts	True	<input type="checkbox"/> <input type="text"/>
Allow Savings Accounts	True	<input type="checkbox"/> <input type="text"/>
Credit Card Terms: One-Time Payment	Credit Card Company:	<input type="checkbox"/> <input type="text"/>
Credit Card Terms: Recurring Payment	Credit Card Company:	<input type="checkbox"/> <input type="text"/>
Enable Batch ACH Processing	False	<input type="checkbox"/> <input type="text"/>
Enforce Autopay	False	<input checked="" type="checkbox"/> True !
E-Pay Account Contact Type ID	15	<input type="checkbox"/> <input type="text"/>

When the *Enforce Autopay* setting is set to **True**:

- Any payment accounts that are created through OnlineBill are automatically set to Auto Bill Pay (Recurring).

Manage Payment Accounts					
Account Type	Account Ending	Expiration	Bank Name	Payment Type	Status
Visa	1111	01/2029		Auto Bill Pay	Active
Visa				Non-Recurring	Active

- The **Disable Auto Bill Pay** option is hidden in the Available Actions dropdown menu.

Manage Payment Accounts					
Account Type	Account Ending	Expiration	Bank Name	Payment Type	Status
Visa	1111	01/2025		Auto Bill Pay	Active
Visa	*111	01/2025		Non-Recurring	Active
Visa	*111	01/2022		Non-Recurring	Active

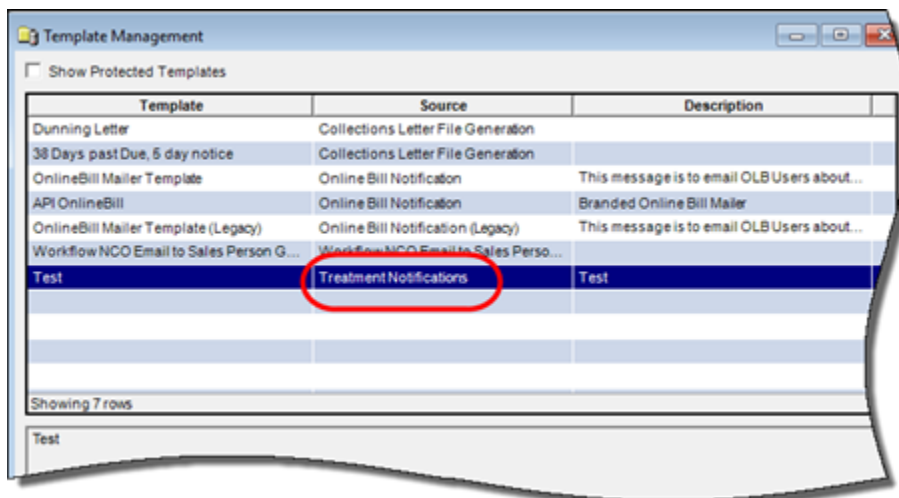
☐ Show Inactive Accounts

Available Actions
 Disable Auto Bill Pay
 Edit Account Detail
 Deactivate Account
 Available Actions... ▼

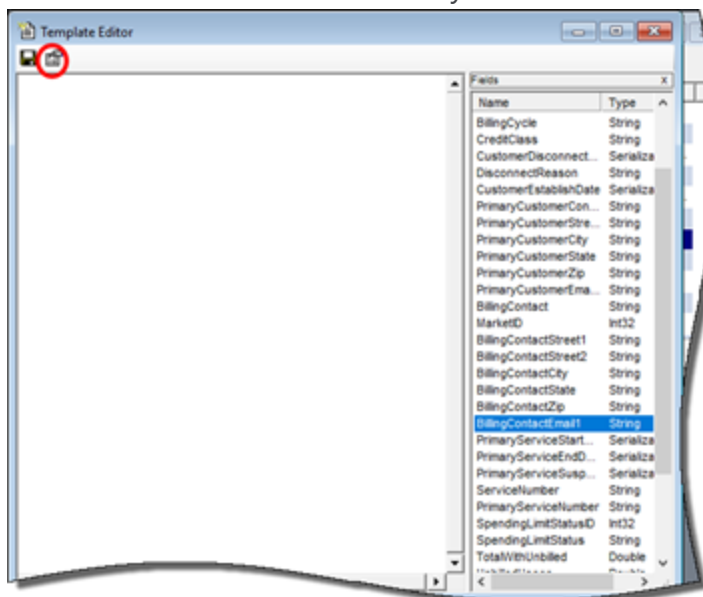
8 Sending Treatment Emails to Billing Contacts

With this release users can choose to send treatment notification emails to billing contacts. Prior to this release, primary contact was the only option. This will require users to update existing treatment notification templates as described in the notes at the end of this section.

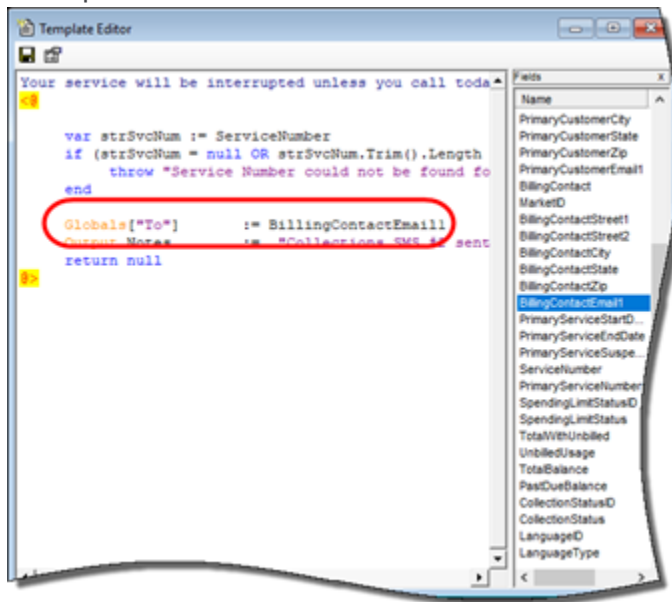
A new field called *BillingContactEmail1* has been added as a Template data source. This field is only available on templates with the source of *Treatment Notifications*.



The new field is available when you select the **Show Fields** option.



Example:

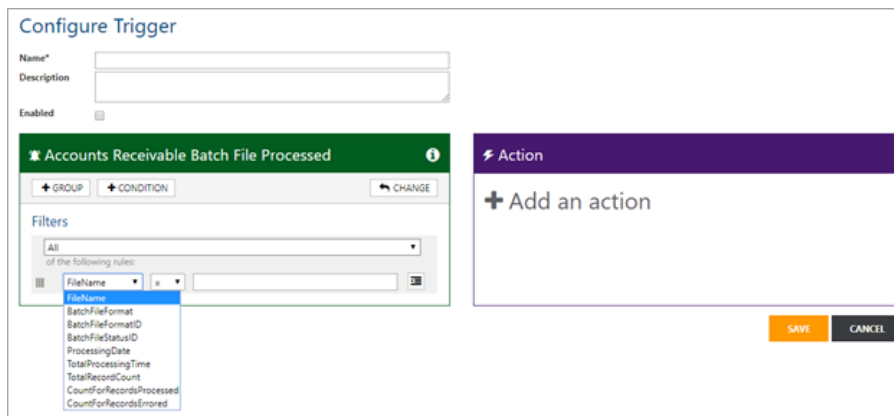
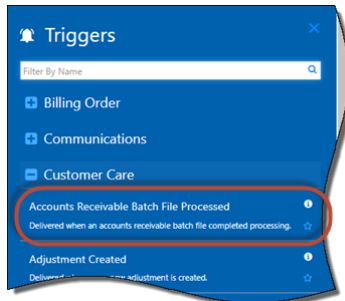


Notes:

- To use this functionality, you'll be required to add the new *BillingContactEmail1* Data Source to any new Treatment Notification templates, and update any existing Treatment Notification templates that you want to send to the billing contact email.
- If the Billing Contact E-mail field is blank and no alternative data source is specified in the template, the notification will not be sent. Logic can be added to templates via a work order to specify an alternative data source.

9 Trigger for Background Payment Processing

A new trigger - *Accounts Receivable Batch File Processed* - is available in the Customer Care folder in Workflow. This Trigger lets you monitor background payment processing.



The trigger will fire when any of the following processes complete:

- ACH Return File
- APP Payments
- Authorize.NET
- Authorize.NET Response
- CostGuard Adjustments
- CostGuard Payments
- CostGuard Transactions
- FTNI NOC File
- Northern Trust Bank Payments
- Payment Reversal File (if applicable)
- PNC Bank Payments
- Silicon Valley Bank Payments

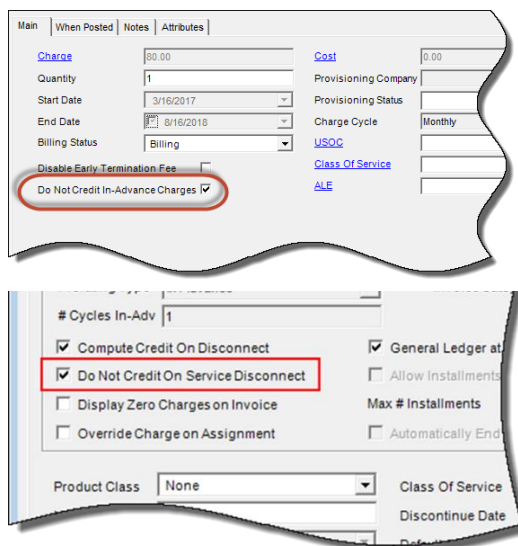
The following properties exist on the trigger:

Name	Type	Description
FileName	Text	Name of file that completed processing.
BatchFileFormat	Text	Format Name of the file that completed processing.
BatchFileFormatID	List	Format ID of the file that completed processing.
BatchFileStatusID	List	Status of file that completed processing.
ProcessingDate	Date & Time	Date and time the file completed processing.
TotalProcessingTime	Positive Integer	Total Time in seconds it took to process the file.
TotalRecordCount	Positive Integer	Total Number of records in the processed file.
CountForRecordsProcessed	Positive Integer	Number of records successfully processed.
CountForRecordsErrored	Positive Integer	Number of records with errors.

The *BatchFileFormat* text will match the name that appears in the Batch File grid in CostGuard Client.

10 Avoid Double-Billing on Reconnect Orders

Configuration of Products, Pricing Plans, and Packages in the Product Catalog has been enhanced with a new parameter - *Enable Crediting On Service Reconnect*. This functionality is intended to help ensure double-billing does not occur when a disconnected service is reconnected, and any billable catalog items on the service were configured *not to credit* on disconnect. Not crediting on disconnect is configured in either of two ways as shown below.



The first screenshot shows the 'Main' tab of a configuration window. It includes fields for Charge (\$0.00), Quantity (1), Start Date (3/16/2017), End Date (8/16/2018), Billing Status (Billing), and Billing Cycle (Monthly). A red circle highlights the 'Do Not Credit In-Advance Charges' checkbox, which is checked. The second screenshot shows the 'Attributes' tab of the same window. It includes checkboxes for 'Compute Credit On Disconnect' (checked), 'Do Not Credit On Service Disconnect' (checked and highlighted with a red box), 'Display Zero Charges on Invoice' (unchecked), and 'Override Charge on Assignment' (unchecked). It also includes a 'General Ledger at' checkbox (checked) and a 'Max # Installments' field (set to 1).

If a service having products configured as described above is disconnected, by default the customer is not credited for any charges associated to those products. Then, if the service is subsequently reconnected, and the service had a plan/feature change prior to reconnection, service representatives would be responsible for manually unchecking the *Do Not Credit In-Advance Charges* checkbox in the Reconnect wizard to avoid double-billing on the next invoice (due to date overlap of old/new products).

The new *Enable Crediting On Service Reconnect* setting lets you avoid relying on your service representatives to perform this manual step on reconnection, where failing to do so would result in double-billing. The setting is located on the Main tab of the Add/Edit dialog for Products, Packages and Pricing Plans.

Product and Packages:

New Package

SKU Description
Alias Alt. Invoice Desc

Main | Taxes | Notes | Attributes | Availability | General Ledger | Behavior | Phone Book | Web Sales | Browse Tags

Charge and Rules

☐ One Price Package

Charge
Charge Cycle Monthly
Prorating Type In Advance
Cycles In-Adv 1

☐ Compute Credit On Disconnect
☐ Do Not Credit On Service Disconnect
☐ Enable Crediting on Service Reconnect

☐ Use Price Matrix
☐ Override Charge on Assignment
☐ Force Charge Override

Choose
Cost
Wholesale Cost
Charge Tax Class No Tax Class Assigned
Invoice Category Main

☐ General Ledger at Component Level
☐ Display Zero Charges on Invoice
☐ Is Basic Service

☐ Allow Installments
Max # Installments
☐ Automatically End Date after days

Product Class None
USOC
Available Date 6/18/2019
Prov. Company None
Category

Class Of Service None
Discontinue Date 6/18/2019
Default Status None
Default Billing Status Billing

Specification View

Last modified by: on 6/18/2019 10:25:57 AM

Save Close

Pricing Plans:

New Pricing Plan

SKU Description
Alias Alt. Invoice Desc

Main | Taxes | Notes | Attributes | Availability | General Ledger | Behavior | Browse Tags

Charges and Rules

Charge
Charge Cycle Monthly
Prorating Type In Advance
Cycles In-Adv 1

☐ Use Price Matrix
☐ Override Charge on Assignment
☐ Force Charge Override

Cost
Wholesale Cost
Charge Tax Class No Tax Class Assigned
Invoice Category Main

☐ Is Basic Service
☐ Display Zero Charges on Invoice
☐ Compute Credit on Disconnect
☐ Do Not Credit on Service Disconnect
☐ Enable Crediting on Service Reconnect

Product Class None
USOC
Available Date 6/18/2019
Prov. Company None
Country Group Default
Call Plan None
Prod. Category

Class Of Service None
Discontinue Date 6/18/2019
Default Status None
Commission
Default Billing Status Billing
Processing Order

Specification View

Last modified by: on 6/18/2019 10:26:54 AM

Save Close

For any Product, Package or Pricing Plan with *Enable Crediting on Service Reconnect* checked, when a Reconnect Service order is submitted, the system will uncheck *Do Not Credit In-Advance Charges*. Your service representative will not have to remember to perform this step. After the Service Reconnect order is complete, the Detail Form of the Catalog Item will be updated and will display *Do Not Credit In-Advance Charges*, as unchecked.

Enable Crediting on Service Reconnect is an optional parameter and defaults to not selected (unchecked); meaning, by default the system will behave as it did prior to this enhancement.