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Core Release Bulletin

CostGuard Solution 19.10 Release

Oct 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.

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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 3083	**Corporate Hierarchy display enhancements** – On the Corporate Hierarchy view on the Invoice page, the heading *My New Charges* has been changed to *My Charges*. The My Charges value will only represent the new charges on the invoice for the customer being viewed. It will not contain any charges for child accounts. (Previously this included child charges when corporate roll-up was done on the invoice). In addition, informational text has been added to the *My Charges* and *Corporate Charges* headings.
Orders	FR 2853	**Wireless service order enhancements** - Enhancements in the Order Details pane where you can view and edit order item details for a wireless service let you: • Mark the service as primary • Determine which services on the account will receive usage notifications • View and edit equipment details
Tickets	FR 3092	**Allow resolution note to be edited** – Previously, you were only able to edit the resolution note on changing the ticket status. Now you can edit the resolution note anytime one is present.
Workflow	FR 3024	**Search for triggers based on System-Defined or User-Defined** - The Trigger search page now supports filtering of user-defined versus system-defined triggers. System-defined triggers are not displayed by default but can be displayed by changing the new *Type* option in the search criteria. When viewing a system-defined trigger, a *System Defined* label is displayed.
	FR 3092	**Added Datalook up** for customer attributes by key and by name.
Customer Management	FR 2744	**Managing Service Agreements** – Lets authorized CostGuard users edit parts of Service Agreements directly in CostGuard Client without requiring an AR. Areas that can be edited are: Title, Acknowledgment (Financial Responsibility) and Terms and Conditions.
	AR 8491	**Contact management enhancements on services** – When editing a service in Customer Management, the selected Contact will display at the top of the Contact Field on the Contact Information tab. The drop down sorts contacts alphabetically by Display Name, which includes MI, Last Name, Company Name, and Address if available. This accounts for scenarios where the first or last name are not provided as they are not required fields.
Treatment	AR 8527	**Fire *Collections Information Modified* trigger on collections workbook updates** – With this enhancement, changes to collections information that occur when the workbook runs will fire the *Collections Information Modified* trigger. Previously this trigger would only fire when changes were made through the Web API.
Product Catalog	FR 3086	**Product Catalog configuration supprts taxes for Dynamic Charges and Contract Penalties** (new Taxes tab on the Add/Edit dialog).
RateBill	AR 8446	**New monthly billing cutoff option for In Advance - No Prorate products** – A new Customer Care setting provides alterative billing cutoff logic to ensure transactions for Products and Packages with Prorating Type = *In Advance – No Prorate* are billed within the bill period in which they occur, regardless of when billing is run. **Note:** The setting defaults to disabled. This will result in no impact on billing for these Products/Packages (current functionality is maintained).

Functional Area	AR/FR	Description
RateBill	AR 8497	**Use Grace Period End setting for account-level grant discounts** - When an account-level discount is disconnected on the same day the customer is disconnected, and the *Grant Discount Ignore End Grace Days* setting is OFF, the *Grace Period End* setting is applied to the discount, pushing the end date out by the specified number of days. This allows usage to use the discount for this extended time. (These are Console Configuration settings that must be set by an authorized IDI associate.) Grace will not be applied when a discount has been disconnected in a previous billing period and the discount does not have units in the current period, since the discount will not be loaded. **Note**: Previously, this functionality only applied to service-level grant discounts.
Payment Processing	AR 8530	**Added Payment Return Reason to Customer Care & CostGuard Client** - Updated ACH Return File Import to capture the Payment Reversal Reason from the import in the Description field on Payment Reversal in CostGuard.

1.2 RESOLVED KNOWN ISSUES

The following known issues have been resolved in this release.

Functional Area	PR	Description
RateBill	83217	Updated Rate Plan Detail entry to prevent adding duplicate entries (same distance type).
OnlineBill	83200	The OnlineBill User Import screen that lists domains just shows the domain description, if the domain has no description a *null* would be displayed. This was updated to show <Description> (<Name>) if a description is populated, If one is not populated, just the <Name> of the domain is shown.
	83234	Resolved an issue where Hyperlink Attributes were not displaying correctly for billing orders in Customer Care.
Payment Gateway	83149	Long-Running PCI Payment Gateway Transaction Processing Job - Created a thread-monotoring process to ensure a single thread doesn't run for longer than a specified time. The time is hardcoded and not configurable.
	83182	Credit card payment settled in Auth.net but has a processing error in Care: • Added additional logging to PCI Scheduled job to track all transactions it processes or tries to process. This is to see if the system is trying to process a transaction twice. • Added hash table check to ensure the system is not processing a transaction that was already processed or the system started to process.
	83196	Fixed Back Dating of an Adjustment Reversal - Previously, when the Customer Web Service created an Adjustment Reversal via the modify Adjustment Operation, it set the adjustment date to the original adjustment date. Now the web service will set the adjustment date to the current date.
Workflow	83194	Updated the Add Note dialog in Workflow to check for Manage Workflow Instance.
	83204	Fixed error handling for the following Workflow Actions: Web API, Update Billing Status, Create Ticket, Modify Follow-Up Workflow tasks will only get set to Error if a web service error is returned with a logging message (non-correlation) OR some other action validation fails (ID does not exist). If an action fails with either a correlation ID from a web service, or an otherwise unhandled exception, that exception will escape to the action so that it is retried.
	83208	Updated graphing engine to correct drawing issues in Workflow Designer.
	83230	Extended Data not Passing to Sub Workflow Properly - Fixed Splitter Subworkflow activation logic to correctly compute the extended information when doing replacement using @[SplitGrouping.MemberName].

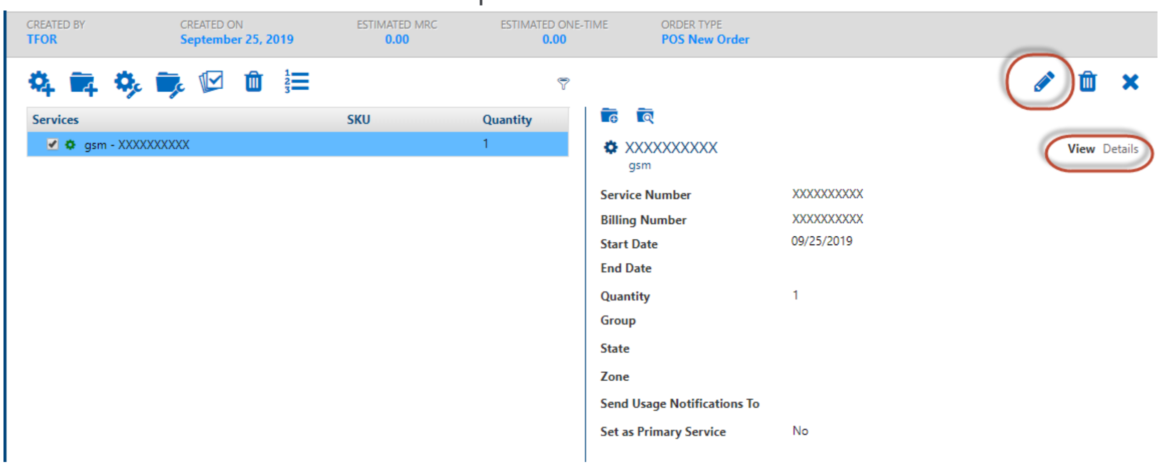
Functional Area	PR	Description
Services – E911 Information	83229	Resolved some issues with E911 information being removed: • When adding a new service, if you edit the service from the order tree and then add a single service address: ▪ If you *do not* click on the e911 tab, the service is created with the service address and the e911 address is set ▪ If you *do* click on the e911 tab the service address is pre-selected in the dropdown and the service is created with your selection. • When adding a new service, if you edit the service from the order tree and then add a multiple service addresses: ▪ If you do not click on the e911 tab, the service is created with the service address and the e911 address is set to the first service address entered ▪ If you do click on the e911 tab, first service address entered is pre-selected in the dropdown and the service is created with your selection. • Edit Service that has no service addresses and no e911 address: ▪ Add single service address don't click the e911 tab - e911 address should be set to the service address entered ▪ Add Single service address click the e911 tab - e911 address should be set to the service address entered ▪ Add Multiple service addresses, the first entered service address should be saved/defaulted as the e911 service address • Edit a service that has a service address but no e911 address: ▪ if there is 1 service address, go to the e911 tab and the one address should be selected in the dropdown ▪ If there are more than one addresses, then going to the e911 tab will not have any pre-selected • Edit a service that has a service address and e911 address: ▪ Add another service address, should get a confirmation prompt when saving to confirm that the e911 service address is correct.
Work Plans	83221	The Journal Grid Control applies user limit-tos when loading journals. Since the journals on a Work Plan are not associated to a customer, they were getting filtered out by the user limit-to logic. Now, journals on a work plan will not have limit-tos applied. If you are able to get to the work plan you will be able to see the journals on it.

2 Orders – Wireless Service Enhancements

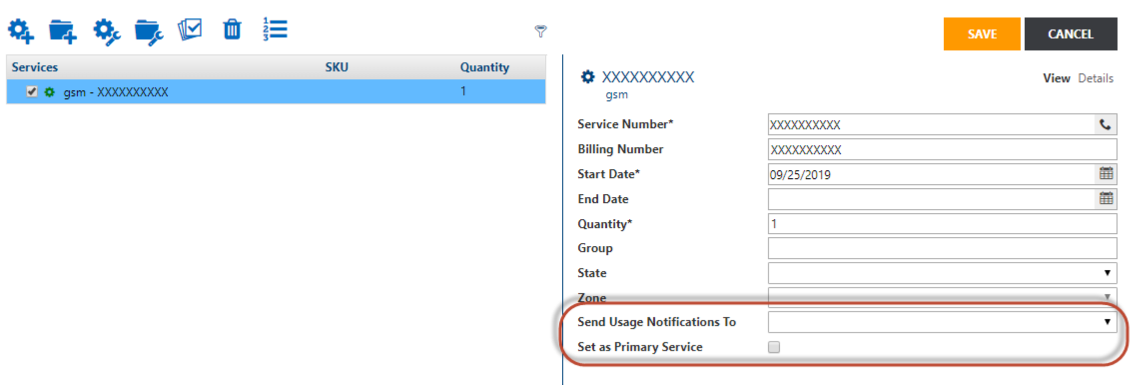
Enhancements in the Order Details pane where you view and edit order item details for a wireless service let you:

- Mark the service as primary
- Determine which services on the account will receive usage notifications (For more on usage notifications, see *About Usage Notifications* in CostGuard Online Help)
- View and edit equipment details

Order Details View/Edit Order Items pane:



The Edit dialog (displayed when you click the pencil icon) provides new fields for marking the service as primary, and specifying who should receive usage notifications.

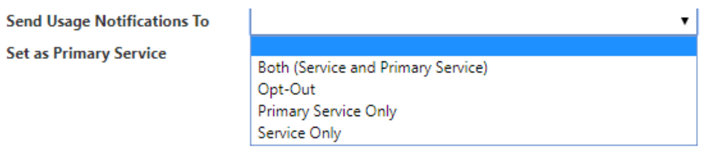


Checking the **Set as Primary Service** check box makes this service the primary service on the account. The designated primary service may be selected to receive usage notifications as described below. Also, any applicable Entitlements are applied to a customer's primary service. See the topic for *Entitlements (Wireless)* in CostGuard Online Help.

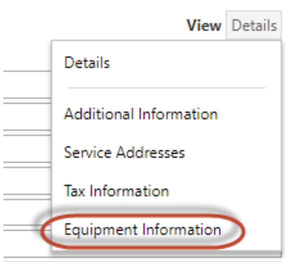
The **Send Usage Notifications To** drop down menu lets you determine which service(s) should receive usage notifications. The choices are:

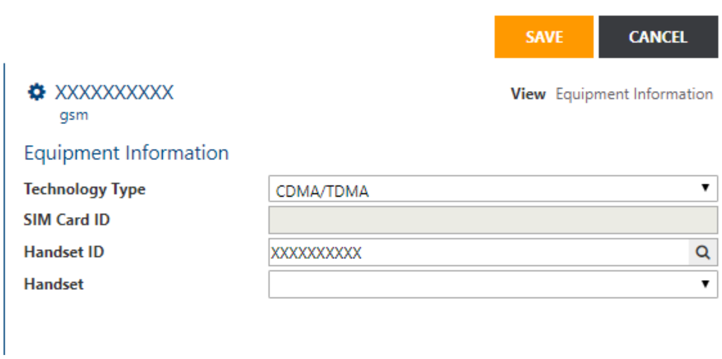
- **Both (Service and Primary Service)** - Send notifications to this service and the account's primary service.
- **Service only** - Send notifications to this service.
- **Primary Service only** - Do not send notifications to this service. Send notifications to the primary service instead.
- **Opt-Out** - Do not send notifications for this service. This applies to all usage notifications. You can't opt out of notifications for one discount category (or threshold) and receive notifications for a different category (or threshold). This option is only available if the global setting, Disable Opt-Out Option, is unchecked.

This menu defaults to **Service Only**.



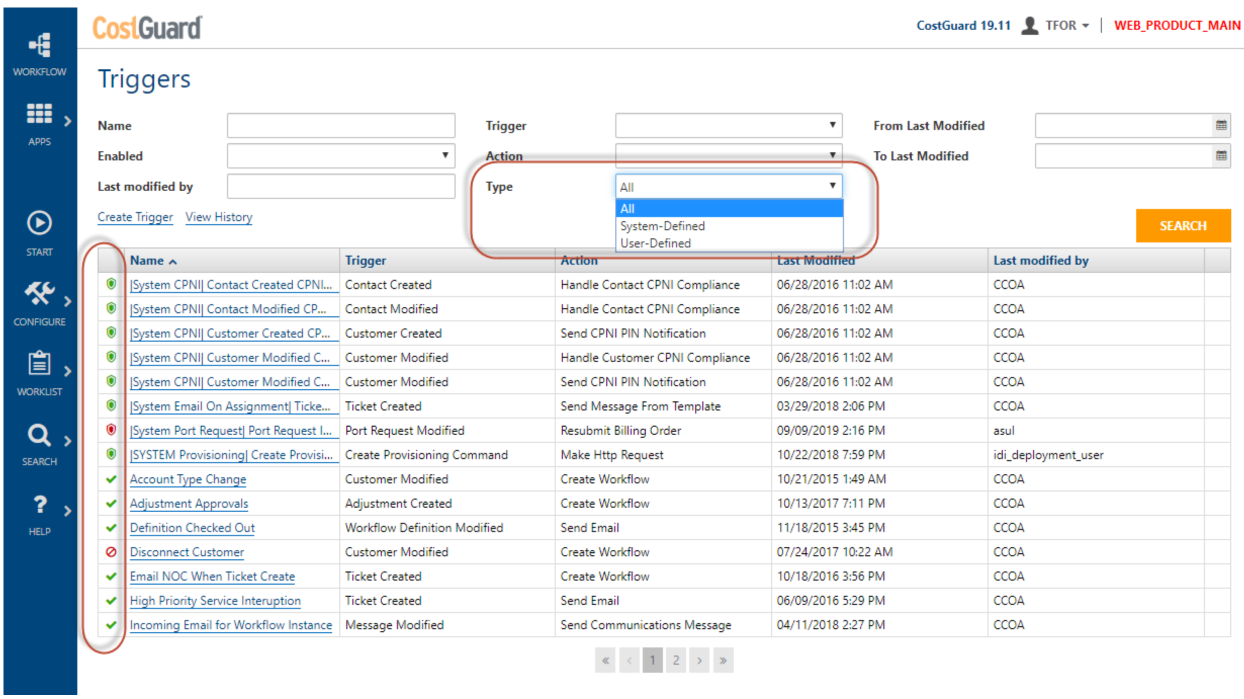
The Details menu provides a new option for **Equipment Information**:



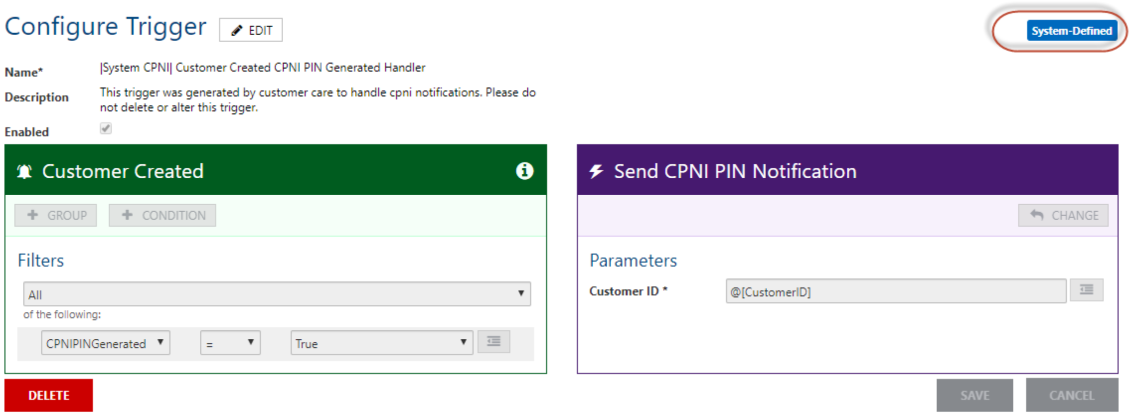


3 Workflow – System- or User-defined Trigger Search

In Workflow, the Trigger Search now lets you search by system-defined or user-defined triggers. The search criteria includes a new *Type* drop-down menu that lets you select **All**, **User Defined** or **System Defined**. In addition, the first column now serves two purposes. It continues to indicate whether the tigger is enabled (green) or disabled (red). With this new enhancement, the column also indicates whether the trigger is system-defined (shield icon) or user-defined (check icon).



When you select a system-defined trigger, the trigger form provides a label to indicate this trigger type. This label is not provided on user-defined triggers.


Configure Trigger
EDIT
System-Defined
Name*
|System CPNI| Customer Created CPNI PIN Generated Handler
Description
This trigger was generated by customer care to handle cpni notifications. Please do not delete or alter this trigger.
Enabled
Customer Created
GROUP
CONDITION
Filters
All
of the following:
CPNIPINGenerated
=
True
Send CPNI PIN Notification
CHANGE
Parameters
Customer ID *
@[CustomerID]
DELETE
SAVE
CANCEL

4 Managing Service Agreements

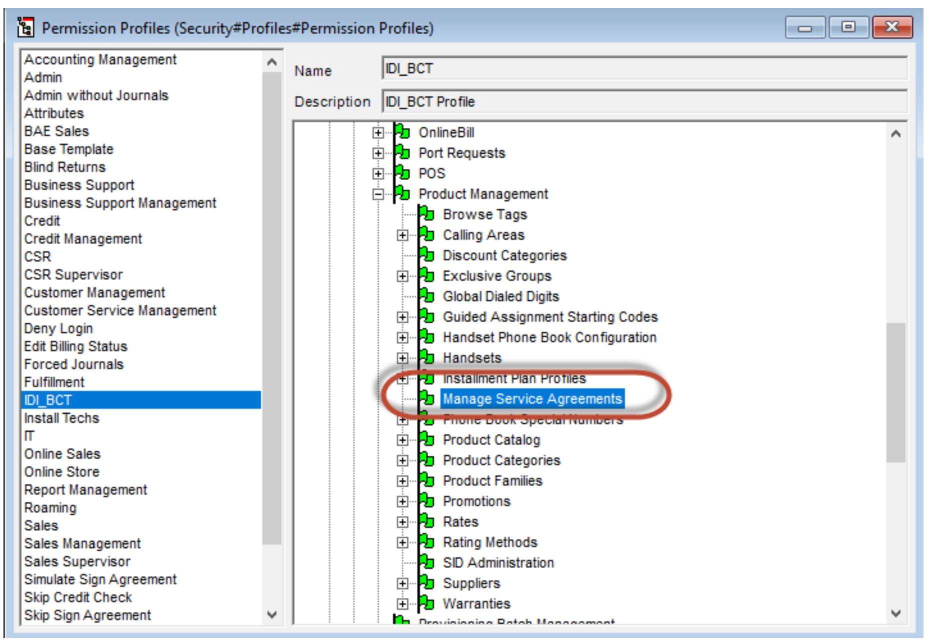
A new option in CostGuard Product Management lets you edit or copy and edit service agreements directly in CostGuard Client without requiring an Adaptive Request (AR). The following areas can be edited:

- Title
- Acknowledgment (Financial Responsibility)
- Terms and Conditions

This lets you roll out a textually updated service agreement to better align with its associated Contract without IDI's assistance. Access to this editor is restricted by a new permission which must be enabled in the user's profile. **Note**: Any modifications to an existing service agreement that are not supported by this solution will still require an AR.

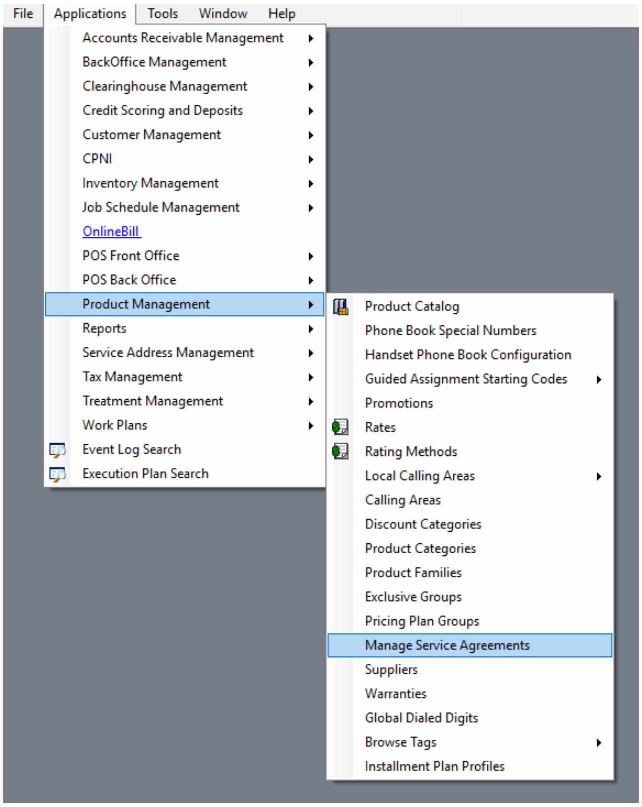
4.1 MANAGE SERVICE AGREEMENTS PERMISSION

The following permission must be enabled in order to use the new Product Management option for managing service agreements: **Applications** > **CostGuard Client** > **Product Management** > **Manage Service Agreements**.

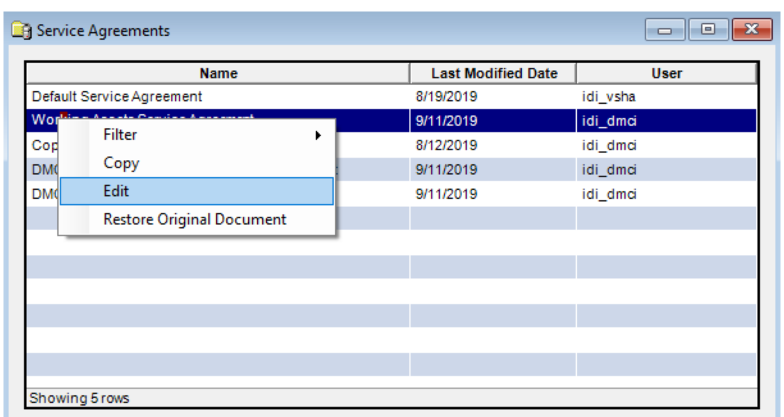


4.2 MANAGING SERVICE AGREEMENTS VIA PRODUCT MANAGEMENT

Access to managing service agreements is via the Product Management menu in CostGuard Client.



Choosing **Product Management** > **Manage Service Agreements** displays a window listing existing service agreements. Right-click menu options for a selected service agreement let you edit, make a copy and then edit, or revert back to the original document. You can also filter the list of displayed service agreements.



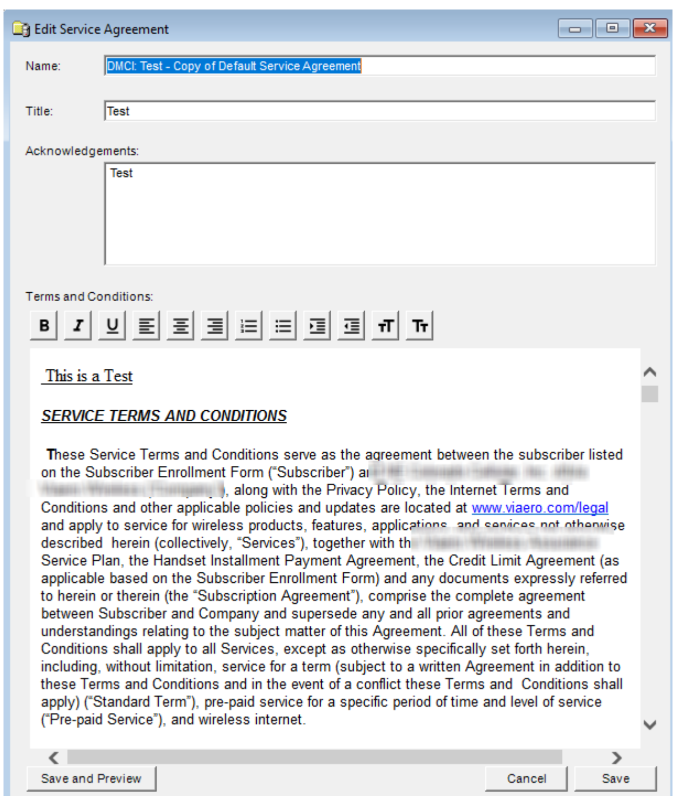
4.2.1 EDIT

Right-clicking on a service agreement and choosing **Edit** opens the service agreement in the text editor. From here you can edit the following areas of the service agreement:

- Title
- Acknowledgment or Financial Responsibility - text only (excluding section title). **Note**: This is the text shown on a Signature Capture Device.
- Terms and Conditions (2nd page of the service agreement) – text only (including the Page/Section title).

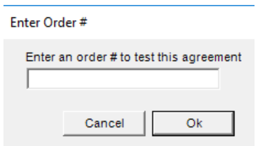
The first time you edit a service agreement, or after using the **Restore Original Document** option, the Edit window will not display any text in the Title, Acknowledgements, or Terms and Conditions sections. The original text for these fields is stored in an HTML template file and cannot be displayed in the Edit window. Once a service agreement has been edited, the new text is saved in the database and is used to override the HTML template text. The text saved to the database is displayed in the editor for subsequent edits.

The text editor supports fonts, page and text breaks. Edited and saved text are immediately applied to the next generated service agreement when assigned to a Contract. There is no change/impact to any service agreements generated before the text changes.



Save and Preview

The editor lets you preview the changes and then render a PDF when you're satisfied with them. Clicking **Save and Preview** prompts you for an OrderID to test the agreement.



The order used for the preview must be a POS Order with a receipt number, and the order must contain a contract with a service agreement. This is used to build the Service Information section of the sample agreement. **Note**: If you use the **Save and Preview** option and then click **Cancel**, the changes are already saved and cancel does not discard those changes. If you don't want the changes, you'll have to edit the document again to remove any unwanted changes.

4.2.2 COPY

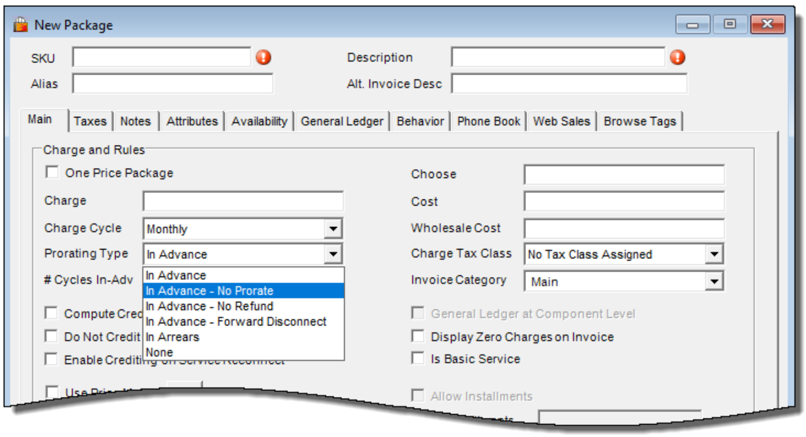
Copying creates a duplicate of the selected service agreement, which can then be edited. On saving, the system enforces assigning a unique name.

4.2.3 RESTORE ORIGINAL DOCUMENT

This option lets you restore a service agreement that has been edited to its original text. You'll be prompted to confirm this action before the system actually restores the document. The next time you choose to edit the restored document, the Edit window will not display any text in Title, Acknowledgements, or Terms and Conditions sections as previously described.

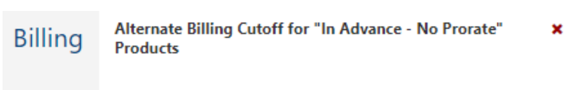
5 New Monthly Billing Cutoff Option for No Prorate

Currently, for *in-advance no prorate* products/packages, if the transaction occurs on the first day of the next bill period, those products will be included on the previous bill, if the transaction occurs before billing has run for the previous bill period. This applies to any Product or Package whose Prorating Type is set to *In Advance – No Prorate* in the Product Catalog as shown below.



As an alternative, you can now have transactions for these products/packages apply to the bill period in which they occur, regardless of when billing is run.

This is done via a new setting in Customer Care. The setting is available via MANAGE > Settings and is called **Alternate Billing Cutoff for In Advance – No Prorate Products**.



- **When this option is enabled**, transactions done on the first day of the next period for *In Advance No Prorate* products/packages will be included on the bill for that period rather than the previous one. These products/packages will be invoiced if they are active on the last day of the bill period, regardless of when billing is run. Also, *In Advance No Prorate* products/packages disconnected on the first day of the next bill period will be included on the bill for the current period.
- **When this option is disabled (default)**, transactions done on the first day of the next period for In Advance No Prorate products/packages will be included on the previous bill if the transactions are done before billing has run for the previous bill period.

Notes:

- The setting defaults to disabled. This will result in no impact on billing for In Advance No Proate products/packages (current functionality is maintained). It is recommended that you carefully consider all ramifications prior to using the alternate billing cutoff.
- If you do not have access to Customer Care and wish to use this functionality, you may request that IDI enable it for you via a service request.