

Core Release Bulletin

CostGuard Solution 20.9 Release

September 2020

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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 | FR 3303 | Retail product and discount details on Retail History Page – This adds the ability to view product and discount details on the Retail History page originally added in CostGuard 20.8. |
| | FR 3006 | View Tender History – The Retail History page (provided with the 20.8 release) now provides Tender History information similar to the view in CostGuard Client. |
| Balance Web Service | FR 3299 | Error message enhancement - The Balance web service contained error messages that indicated they occurred in the Customer web service. These messages have been updated to correctly indicate the Balance web service. |
| Communications | FR 3232 | <p>Improved efficiency on indexing body text for message and notification search This release provides enhancements for storing message/notification body text in the Azure search index.</p> <ul style="list-style-type: none"> • Discontinue storage of notification body text - Communications no longer stores the body of notifications in the Azure search index. A one-time process will remove all existing notification bodies from the index. Also, the <i>Body</i> field is disabled when Notifications are selected as the Type in Communications search. An information icon informs users that body searches only apply to Messages. • Data life-cycle management –CostGuard automatically removes message body text from the search index for aged messages related to Workflow, Customer Care, Tickets and Communications after a set number of days. When a body text search is performed against an aged message it will return no results. Instead users will get a warning indicating body text search is not available for aged messages. Note: This release includes four new <i>Archive Messages</i> actions in Workflow that are set up specifically for Data Lifecycle Management. They are not intended for any other purpose and do not require any configuration by CostGuard users. <p>Note: With these enhancements users will be unable to find notifications and <i>aged</i> messages when searching the body text, however, the original message and notification body text is still intact. Users can navigate to items using other search criteria to see full body text.</p> |
| Taxes | AR 8612 | Tax Management API – A new Tax Management REST API with a <i>Calculate Taxes</i> operation supports providing tax amounts for features in the Product Catalog. |
| CostGuard System Requirements | FR 3138 | <p>Revised version of the CostGuard Customer System Requirements for version 20.9 - These requirements are provided in the IDI Knowledge Center under Documents > Specifications (http://help.idibilling.com/?ht_kb=specifications).</p> <ul style="list-style-type: none"> • Update for the required version of the Microsoft .NET Framework from 4.52 to 4.8. • Minimum versions for some Microsoft supporting systems are updated to reflect the vendors end of support milestones for older platforms. |

1.2 RESOLVED KNOWN ISSUES

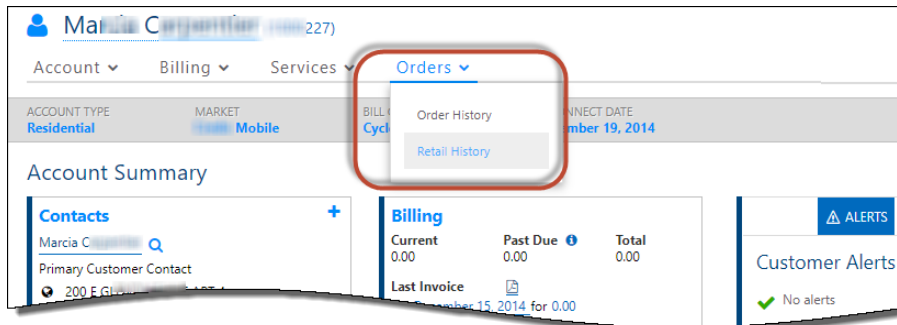
The following known issues have been resolved in this release.

| Functional Area | PR | Description |
|---|-------|---|
| Customer Care | 83533 | A customer field configuration rule is in place that prevents adding and editing tax data (including extended exemptions) on an account; however, it was allowing extended exemptions to be removed. Customer field configuration has been fixed to enforce extended exemptions rules correctly. |
| | 83538 | When loading the Order History page in Customer Care, billing orders took too long to load. The performance has been improved by adding <i>CustomerID</i> to the query that retrieves this information. Note: Systems on SQL 2014 will not see any benefit, due to the older SQL version. |
| Security | 83472 | On creating a new user in any web application (Customer Care, etc...), SaaS Security permitted creating user names with commas, for example Test,account; however, the web application would not allow log-in with such user names. To avoid log-in errors, Security and the Security web service have been updated to not allow commas in user names. Attempting to create a user name with a comma in any web application will now result in an error. |
| OnlineBill | 83532 | The OnlineBill Service Summary Export function was outputting some data in the incorrect column. The <i>Charge</i> column was empty (no data), while the <i>Charge</i> value was presented in the column to the right. This has been resolved so that headers and their corresponding data line up in the correct columns. |
| Notifications – CostGuard Client | 83537 | The Notification tab in CostGuard Client was only pulling down the first 50 templates. As a result any attempt to find the template of a notification that was not in the first 50 resulted in an error. Paging has been added to pull down all templates. |
| RateBill | 83529 | Rounding Issue: .01 difference for Tax Data in Invoice Detail vs Invoice Tax Detail - A difference of .01 was discovered for tax data stored in InvoiceDetail versus InvoiceTaxDetail. This was due to how the 5th decimal place in the tax calculation was stored and rounded. Billing logic was updated to correct this issue. |
| | 83535 | To prevent RateBill failures, additional exception handling has been added to the logic used by RateBill for committing writes to databases. |
| | 83540 | When the <i>Alternate Billing Cutoff for In Advance - No Prorate</i> Products setting was enabled in Customer Care, products with prorate type of <i>In Advance - No Prorate</i> would double charge when they were end-dated on the last day of the bill cycle, prior to billing running. Billing logic has been updated so that this no longer occurs.. |
| Product Catalog – Discount Configuration Wizard | 83530 | The Allow Chargebacks checkbox in Discount Configuration wizard in Product Catalog was always set to unchecked (false) on loading the page. This occurred if the setting had been checked and saved in a prior instance of the wizard, as well as when a user checked it in the current instance of the wizard, chose to advance in the wizard (by clicking Next) and then navigated back to the page. The wizard has been updated to retain the previous setting for this check box (checked or unchecked), rather than always loading with the setting unchecked. |
| POS Make Quick Sale | 83563 | A bug introduced by AR 8630 (Blocking ACH payments for customers in bad standing, deployed in CostGuard 20.6) was causing a critical error in POS Make Sale on attempting to tender the sale. This has been corrected to no longer prevent Quick Sales from tendering. |

2 Retail History Enhancements in Customer Care

The Retail History page (originally available with CostGuard 20.8) and available via the Orders drop down menu has been enhanced to provide:

- retail product and discount details
- tender history



2.1 RETAIL PRODUCT AND DISCOUNT DETAILS

On the Retail History page, when you expand a transaction to show the line items, selecting an item displays the item's details in the right panel. These details are equivalent to the details displayed in CostGuard Client Orders Tab, Retail Subtab, POS Transaction Search results (view transaction's line items), and the POS Sales Detail Report.

Product Details:

Retail History

Sort By

Finalize Date (Newest First)

| Description | Quantity | Total |
|------------------------------------|----------|---------|
| STS-139-192229 | | 10.49 |
| LG 101 - 2 | 1 | 149.99 |
| Sell Discount | 1 | -140.00 |
| Cling: Telespree Activation | 1 | |
| Equipment Insurance Brochure | 1 | |
| TELESPREE ACTIVATION INSERT V2 CM | 1 | |
| Recycling Envelope_ver_2- Flipswap | 1 | |
| FREE Ground Shipping | 1 | |
| 117133 | | 0.00 |

STS-139-192229

View Details

Sales Request

Description

LG 101 - 2

Product Type

Serialized Retail Product

Extended Price

149.99

Item Number

1

SKU

1000190

Inventory Status

Available for Sale

Serial Number

2

Unit Price

149.99

Quantity Purchased

1

Quantity Returned

0

Status

Completed

Service Number

70

Return Reason

Note

Discount/Price Adjustment Details:

Retail History

Receipt Number ...

Sort By Finalize Date (Newest First)

| Description | Quantity | Total |
|------------------------------------|----------|---------|
| STS-139-192229 | | 10.49 |
| LG 101 - 26 | 1 | 149.99 |
| Sell Discount | 1 | -140.00 |
| Cling: Telespree Activation | 1 | |
| Equipment Insurance Brochure | 1 | |
| TELESPREE ACTIVATION INSERT V2 CM | 1 | |
| Recycling Envelope_ver_2- Flipswap | 1 | |
| FREE Ground Shipping | 1 | |
| 117133 | | 0.00 |

View Details

STS-139-192229

Sales Request

| | |
|--------------------|-----------------|
| Description | Sell Discount |
| Product Type | Retail Discount |
| Extended Price | -140.00 |
| Item Number | 2 |
| Unit Price | -140.00 |
| Quantity Purchased | 1 |
| Quantity Returned | 0 |
| Status | Completed |
| Reason | PROMOTION |
| Note | |

2.2 TENDER DETAILS

The Retail History now provides Tender Details for a selected transaction similar to the view in CostGuard Client. To see the Tender Details for a transaction, first select the row in the Transactions list to display the Details view, and then select the **Tender Details** option from the **View** menu.

Retail History

Receipt Number ...

Sort By Finalize Date (Newest First)

| Description | Quantity | Total |
|------------------------------------|----------|---------|
| STS-139-192229 | | 10.49 |
| LG 101 - 26 | 1 | 149.99 |
| Sell Discount | 1 | -140.00 |
| Cling: Telespree Activation | 1 | |
| Equipment Insurance Brochure | 1 | |
| TELESPREE ACTIVATION INSERT V2 CM | 1 | |
| Recycling Envelope_ver_2- Flipswap | 1 | |
| FREE Ground Shipping | 1 | |
| 117133 | | 0.00 |

View Tender Details

STS-139-192229

Sales Request

| | |
|----------------------|--------------------|
| Finalized Date | 04/02/2011 8:44 PM |
| Credit Card | 10.49 |
| Billing Order ID | 1417957 |
| Reference Number | |
| Authorization Status | Not Specified |
| Card Number | |
| Expiration Date | |

View Tender Details

Tender Details

Details

Starting Codes

Tax Details

Approval Code

Note: Clicking the **Order ID** link in the Tender Details view takes you to the Order Summary page in the Orders application.

3 Message/Notification Storage Enhancements

IDI uses Azure Search to index the *body* property of messages and notifications for full text searches. This enables rapid searching and retrieval of these items in Communications. The data contained in the search index grows exponentially as these items are created and saved to the database.

To help make storage more efficient, CostGuard no longer stores body text for Notifications in Azure Search, and periodically purges body text for *aged* messages. Messages are considered *aged* when they're older than an established retention period. **Note:** This means you cannot search for Notifications and aged messages by body text. Body text remains intact and is viewable when you use other search criteria.

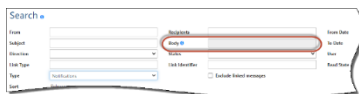
Data Lifecycle Management for Message Body Text

CostGuard automatically removes body text from the Azure search index for *aged* messages related to Workflow, Customer Care, Tickets and Communications after a set number of days. A *Body* search against an *aged* message will return no results. Instead users will get a warning indicating body text search is not available for aged messages.

- **Retention period for message body text in search index** is set to 365 days. This applies to all messages system-wide. The setting is not accessible to CostGuard users.
- **The *ArchiveMessage Communications* web service operation** removes body text from aged messages in the Azure Search index.
- **Workflow actions** find aged messages and call the *ArchiveMessage* web service operation to clear the message bodies from the Azure Search index. **Note:** These actions are set up specifically for Data Lifecycle Management. They are not intended for any other purpose and do not require configuration by CostGuard users.
 - *Archive Linked Workflow Messages* for messages associated to Workflow instances with a *completion date* older than the configured retention period.
 - *Archive Linked Customer Messages* for messages associated to customer accounts with a *disconnect date* older than the configured retention period.
 - *Archive Linked Ticket Messages* for messages associated to Tickets with a *closed date* older than the configured retention period.
 - *Archive Unlinked Messages* for unlinked messages not associated with other objects with a *sent date* older than the configured retention period.
- **Informational text** in the respective applications lets users know the Body field cannot be used to search messages older than the established retention period.

Notifications Cleanup

A one-time process removes all existing notification bodies from the index. The Body field is disabled when Notifications are selected as the Type in Communications search. An information icon informs users that body searches only apply to *Messages*.



4 Tax Management API

A new Tax Management REST API provides estimated tax amounts for features in the product catalog. The API works with the CostGuard Product Catalog and billing tax engine, providing a tax amount for each applicable tax based on the SKUs, location and charge information provided in the API request.

Note: Make arrangements with your Account Manager if you intend to employ this functionality.

Considerations:

- The API will not provide estimated taxes for usage.
- The API does not support partial allocations for private line taxes. Taxes for SKUs that have a private line tax class will be calculated with 100% of the tax allocation applied at the location address provided.
- The API calculates taxes based on the charge provided in the request; however, if the charge information is not provided, the product catalog charge will be used to determine the tax.
- Requests to the API are not stored in CostGuard for any future reference.

Refer to the applicable Web API documentation available via the IDI Billing Solutions Knowledge Center for details on using this API.

5 New CostGuard System Requirements

CostGuard 20.9 includes a revised version of the CostGuard Customer System Requirements. These requirements are provided in the IDI Knowledge Center under Documents > Specifications (http://help.idibilling.com/?ht_kb=specifications).

Foremost among the changes will be an update for the required version of the Microsoft .NET Framework from 4.52 to 4.8. Additionally, minimum versions for some Microsoft supporting systems will be updated to reflect the vendors end of support milestones for older platforms.

5.1 MICROSOFT .NET FRAMEWORK 4.8 DEPENDENCY UPDATE

Any Windows host in your enterprise running an installed version of IDI software (e.g. CostGuard Desktop Client, Launcher Service, Remote Scheduling Service) must have .NET 4.8 installed prior to your environments being updated to CostGuard 20.9. Whether or not your company must take action to install .NET 4.8 is dependent on your I.T. departments existing policies for updating Microsoft applications.

Prerequisite checks were added to the Client Launcher and Remote Scheduling Service installers for the .NET 4.8 Framework and Visual C++ 2015-2019 redistributables, which will initiate upon install if not already in place. It is recommended that these be pre-installed in order to reduce troubleshooting and installation times when attempting to install the new code base.

When can it be installed?

The .NET 4.8 update can be installed anytime prior to your CostGuard environments being updated to 20.9 without any impact to previous versions of CostGuard.

Notes:

- If .NET 4.8 *is not* installed prior to updating to CostGuard 20.9, CostGuard software installed on that machine will no longer function. For hosts running the Launcher Service or Remote Provisioning this could result in interruptions in your service.
- This update *does not* impact hosts running only CostGuard web modules. The CostGuard web modules do not require .NET Framework to be installed on a host.

5.2 MICROSOFT SOFTWARE VERSION UPDATES

Versions of Microsoft software older than the minimum versions stated in the requirements document will no longer be officially supported by IDI. This means that issues determined to be a result of incompatibilities between new versions of CostGuard and unsupported versions of Microsoft software will not be eligible for Problem Request fixes.