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Core Release Bulletin

CostGuard Solution 21.12 Release

December 2021

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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	AR 8759	**Generating and previewing a *prebill* invoice** Customer Care lets you view and compare invoices on a customer's account, including *Prebill* invoices. Prior to this release, Prebill invoices could only be generated by the IDI billing team or by submitting a request from E-Support This new functionality lets you generate prebill invoices directly from Customer Care. Also, the term *Prebill* in Customer Care has been updated to *Preview*.
Security	FR 3433	**Web Login Via Microsoft Edge** Before this change, the CostGuard Web Login form was presented using an Internet Explorer web browser. With this change, the Web Login form can now be presented using a Microsoft Edge-based web browser. To take advantage of this new behavior, Microsoft WebView2 Runtime -- a free, separately installed component -- must be installed on each machine that will be running CostGuard Client. The Web Login form will safely fall back to using Internet Explorer if the WebView2 Runtime is not installed.
AppleCare Equipment Protection Plans	AR 8960	**Do not send MRC parameter with pay-up-front transaction** The AppleCare Processor was updated to allow nulls for MRC value. If the value is not specified, do not send a value, otherwise send *Y* (Yes) or *N* (No).

1.2 RESOLVED KNOWN ISSUES

The following known issues have been resolved in this release.

Functional Area	PR	Description
Customer Care/CostGuard Client	83877	**Issues with Disallow Checks/ACH setting** CostGuard version 20.6 provided a manual account-level *Disallow Checks/ACH* setting in CostGuard Client and Customer Care to prevent the account from making payments via check and creating/using ACH E-Pay accounts. CostGuard version 21.4 (AR 8828) built on this by providing the ability to automatically set *Disallow Checks/ACH* when creating a new account based on the account type. This automated functionality is controlled by the *Disable ACH/Checks* setting available via **MANAGE** > **Settings** in Customer Care. Two issues were found related to these settings: • When *Disallow Checks/ACH* is set (either manually or automatically) an alert should be added to the account to let users know why they cannot perform check/ACH transactions. This occurs correctly when *Disallow Checks/ACH* is set manually; however, alerts were not being applied when it was set automatically by *Disable ACH/Checks* based on account type. • Also, when accounts were created through the Customer Care web module, and *Disallow Checks/ACH* was set on the account, the setting was not being saved. This occurred whether it was set manually or automatically. As a result the alert was not added to the account, and account was allowed to make ACH payments and create/use ACH E-Pay accounts. This solution resolves both issues: • The alert is now correctly displayed on accounts where *Disallow Checks/ACH* is automatically set using *Disable ACH/Checks*. • When you add an account via Customer Care and *Disallow Checks/ACH* is set, the account behaves accordingly. **Note**: With this solution, you can also automatically turn off *Disallow ACH/Checks* and the corresponding alert using the Modify Customer trigger. This can be used if the system is configured to not allow ACH/checks when a prepaid account is created, and the account type is subsequently changed to a type where this should not apply.

Functional Area	PR	Description
Customer Care	83824	**Correlation ID error on billing order screen in Customer Care** Several PRs have been deployed to improve performance when loading billing orders on the Order History page in Customer Care. PR 83538 addressed the view for customers on SQL 2017 in CostGuard version 20.9, while PRs 83589 in CostGuard version 21.01 and 83667 in CostGuard version 21.6 addressed the view for customers on SQL 2014. PR 83824 provides additional optimizations to reduce timeouts for customers on SQL Server Management Studio (SSMS) 2014.
Orders	83820	**Overlapping service number error on new service order** When using workflow splitters to add a parent/child service, if the child service was added first, the add child order resulted in adding a parent service. Subsequently when the parent service order ran, a second parent was added. To prevent this, the parent service is now marked as *processed* in the first order so it is skipped in the second one.
Orders	83884	**Error on disconnect order from treatment workbook** Errors were reported (cart remained in a submitted status) when attempting disconnects through the Treatment workbook. This occurred when the system was handling a higher than average amount of processing. To avoid this Order Placement logic was updated to process these requests in a more efficient manner.
Orders	83892	**Unable to reconnect service - object reference error** Object reference errors were thrown on services where the MIN was in *Reserved* or *Aging* state. The logic was not checking to see if the *objInvServiceNumber* value was null before checking if the item was already in use. This was resolved by applying similar logic for MINs in *Reserved* or *Aging* state that currently applies for MINs in *Not Available* state.
Customer Management	83803	**Contact Modified trigger doesn't fire during edit contact for primary/billing** When modifying a billing contact in CostGuard Client by double-clicking on the Edit Contact menu, the contact modified trigger was not firing. This issue has been corrected. Testing Notes: • In workflow create a contact modified trigger to pick up your edit • In CostGuard Client, go to the *Contact* tab and double click on the billing contact This opens a generic edit contact screen. • Make a change and save. • Confirm the trigger fires.

Functional Area	PR	Description
RateBill Taxes	83874	**County taxes to skip updated** An issue was preventing a county level tax marked as *primary* from being skipped in certain conditions when a city level tax was configured to skip the county tax. The tax engine has been fixed to skip the county level taxes in this condition.
CPNI	83821	**Customer Care CPNI notification failed to find/use custom template** In some cases, CPNI PIN notifications were sent using the wrong notification template. This could only occur when a CPNI PIN notification was sent as a result of user activity from the Customer Care web application and a custom template was configured for the CPNI PIN notification. Note that CPNI PIN notifications sent as a result of user activity from CostGuard client are correctly sent using the custom template if a custom template exists. This issue occurred when the custom CPNI PIN notification template was saved in the database with mixed case in the key name (CPNI.Pin versus CPNI.PIN) Customer Care has been updated to correctly use a custom template for CPNI PIN notifications.
Compliance Revenue Recognition Standards	83906	**FASB ASC 606 - Incorrect calculation of Contract Asset Value** The formula for Contract Asset Value coded in AR8760 (released in CostGuard 21.05) was not correct and was miscalculating these values. The formula was updated as follows: Contract Asset Value = (C*D*M) / (C*M +S) where M = MRC of plan S = Total Stand Alone Price of Qualifying Retail Items D = Total of Qualifying Discounts C = Contract Duration

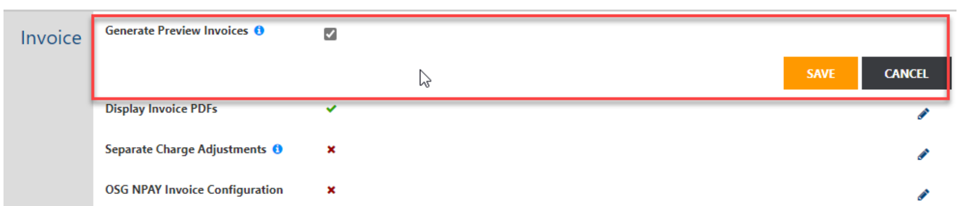
2 Generating and Previewing *Prebill* Invoices

Customer Care lets you view and compare invoices on a customer's account, including *Prebill* invoices. A *Prebill* invoice provides a preview of a customer's next invoice based on the current services and features on an account. This helps you evaluate and compare anticipated invoice charges to a previous (billed) invoice.

Prior to this release, prebill invoices could only be generated by the IDI billing team or by submitting a request from E-Support This new functionality lets you generate prebill invoices directly from Customer Care. Also, on Customer Care displays, the term *Prebill* has been updated to *Preview*.

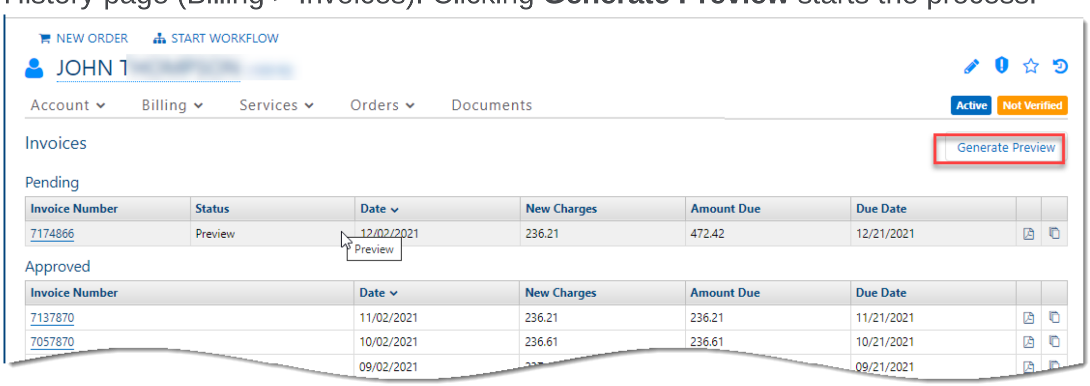
2.1 SETUP

This functionality is disabled by default. You can toggle it on/off via **MANAGE** > **Settings**. The setting is called *Generate Preview Invoices* and is available in the INVOICE section of the Settings page.

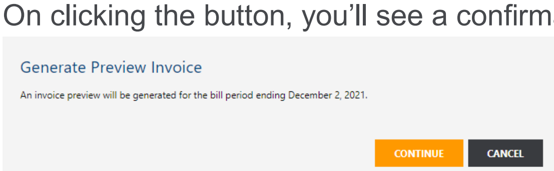


2.2 GENERATING AN INVOICE PREVIEW

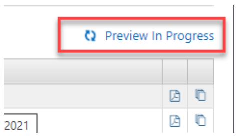
When the above setting is enabled, a new **Generate Preview** option is available on the Invoice History page (Billing > Invoices). Clicking **Generate Preview** starts the process.



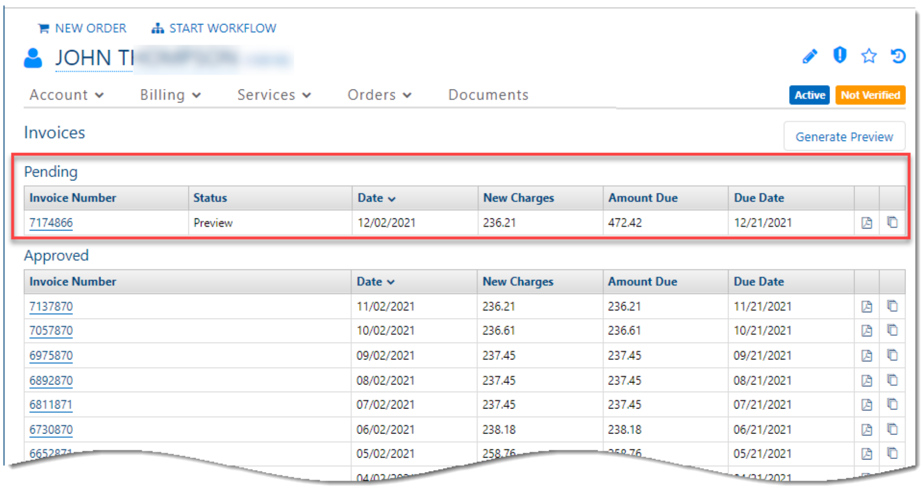
On clicking the button, you'll see a confirmation message that lets you continue or cancel.



If you choose to continue, the button label will change to **Preview in Progress** and the *throbber* icon will spin while the preview is being generated.



When the system is done you'll see a green success message display temporarily in the upper right corner and the preview invoice will be available in the *Pending* list.



Note: You can only generate and have available one preview at a time.

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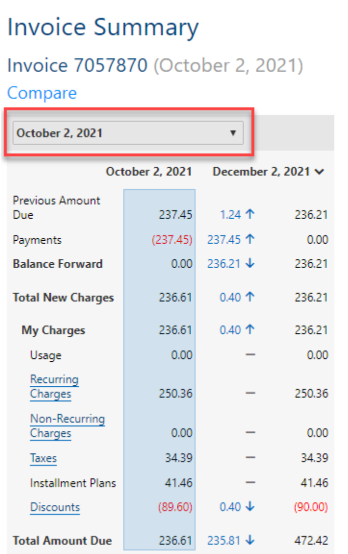
Clicking the *Invoice Number* link displays the preview invoice detail view. Notice the view is labeled as *Preview* rather than *Prebill*.

To compare the preview to an approved invoice:

- From the detail view click the **Compare** button at the right.
- From the Pending list on the History Invoice view, in the Preview invoice row, click the Compare icon at the far right.

In either case you can then choose an approved invoice to compare from the drop down menu on the Preview Detail.

<u>Compare Preview Example</u>:



When the Preview invoice does not include Usage (due to re-rate required), the usage amount is displayed as *Unavailable*.