

Core Release Bulletin

CostGuard Solution 22.3 Release

March 2022

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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
Orders/ Provisioning	FR 3430	Copy provisioning data when assigning service numbers This is for customers using the new Provisioning application. The system will copy provisioning data assigned to the <i>template</i> service when adding additional service numbers via the assign service number functionality in the Orders web module. The system will copy the saved provisioning data associated with the service or features assigned to the service. This reduces the time it takes to create and submit orders with large volumes of services.
RateBill	AR 8763	Reverse Service Penalties workflow action A new Reverse Service Penalties action has been added to Workflow to support reversing penalties applied during final billing when reconnecting an account or service. The new action lets you configure the number of days the account or service is eligible for reversal of penalties (Eligibility Days). You can also configure the Disconnect Reason to reverse Early Termination Fees (ETFs) associated with contract penalties, the adjustment type used to reverse ETFs, and adjustment type to reverse Installment plan balances.
Payment Processing	AR 8956	Use <i>balance to date</i> on retrying a declined E-Pay transaction The CostGuard system lets you set up an automated action for declined E-Pay transactions. This functionality must be enabled and configured in Customer Care. This release (22.3) provides a new configuration option that lets you direct the retry logic to use <i>the balance to date</i> on the account rather than the original transaction amount. The <i>Balance to Date</i> is the Total Balance which includes posted charges (debits) and payments/credits that have not yet been invoiced for the account.
Bulk Import	AR 8885	Bulk importing device records The Bulk Data module allows users to import and update data in the CostGuard system using a comma separated file (CSV). With version 22.3, this module supports bulk adding and modifying device records. Rather than using the existing CostGuard Client Device or Samsung Manifest File Upload utilities, the Bulk Data Import method reduces the likelihood of syntax errors and makes it easier to create and manage import files. You can search and view successfully imported Device records via CostGuard Client Device Management (Applications > BackOffice Management).
Equipment Inventory Web Module	AR 8985	Search and sort by owner in Equipment Inventory OmniSearch This adds a sortable <i>Owner</i> field to the Equipment Inventory OmniSearch results, as well as a drop down to filter by <i>Equipment Owner</i> in the search criteria.

Functional Area	AR/FR	Description
Provisioning	FR 3437	Workflow Management API environment filtering WorkflowManagement APIs have been updated such that they no longer automatically return data for all related environments. Rather each API will only return data for the current environment. This reduces the risk of accidental data exposure.

1.2 RESOLVED KNOWN ISSUES

The following known issues have been resolved in this release.

Functional Area	PR	Description
Orders	83900	Error on voiding a swap order for equipment with an EID Voiding a swap order for equipment with an EID (Embedded Identity Document used on eSIM devices) resulted in the following error: <i>Only one instance of an EID is permitted in the device table.</i> The code for voiding an eSIM device swap has been updated to revert to the original EID on the service instead of trying to use a new EID (as would be applicable if the swap were to proceed).
Orders	83973	Tax Class ID > 31 not supported In the Order Placement web service products having a tax class ID > 31 would not compute properly. This was corrected to handle tax class IDs up to and including 63.
Orders/ Provisioning	N/A	<ul style="list-style-type: none"> • Service-level action links broken – On the Order Details page, clicking a service-level action icon (Add Service or Modify Service) located above the list of services in the left panel, users landed on bad URL (account number not filled in). This was likely broken by updates introduced in the 22.2 release. Proper functionality has been restored in the 22.3 release. • Missing Delete & Assign Service Number buttons – On the Order Details page, when you select a service in the left panel by clicking the associated check box, you should see icons for <i>Delete Service</i> and <i>Assign Service Numbers</i>; however, the icons only displayed on unchecking the check box (opposite of expected behavior). This has been corrected.
Customer Care	83914	Journal not listed on clicking JournalID hyperlink in search results


Functional Area	PR	Description
		In some cases, clicking a Journal ID in the Journal OmniSearch results would take you to the Journal page for the account, as expected; however, the journal would not be displayed. This display issue has been fixed.
Security	83835	Search field in Add User Roles not functioning The search field in the Add User Roles dialog would not allow users to click into it. As a result, users were unable to filter the list of environments and roles. This issue has been resolved.
Provisioning	83946	AppleCare Testing - Error During Verify The DeviceErrorResponse received from Apple was not in the format as shown in their documentation. This functionality has been updated to properly receive the response. This new functionality can only be used when Apple 1.2 is selected in the Provisioning Web Application.


2 Copy Provisioning Data when Assigning Services in Orders

This is for customers using the new Provisioning application. The system will copy provisioning data assigned to the template service when adding additional service numbers via the assign service number functionality. The system will copy the saved provisioning data associated with the service or any features assigned to the service. This reduces the time it takes to create and submit orders with large volumes of services. For example:

- Add a template service and save the provisioning data.

Services	Quantity	Charge
<input checked="" type="checkbox"/> Voice - SIP Service - XXXXXXXXXX	5	

 XXXXXXXXXX
Voice - SIP Service

View Provisioning 

Show All

SIP

Persistent Profile ^{\$}

Subscriber Group ^{\$}

Signaling Type ^{\$}

Number Status ^{\$}

Line Name

Device MAC Address

Device Description

SIP User Name

Individual Line

Basic Subscribers

SIP

Normal

- Choose the method to assign service numbers.

Assign Service Numbers

Total Quantity

5

Method*

Range

Group

Quantity*

5

From*

919851

0000

To


9198510004


ADD TO ORDER

CANCEL

- When the service numbers are assigned, the provisioning data is copied to the replicated services.

Services	Quantity	Charge
<input type="checkbox"/> Voice - SIP Service - 9198510000	1	
<input type="checkbox"/> Voice - SIP Service - 9198510001	1	
<input type="checkbox"/> Voice - SIP Service - 9198510002	1	
<input type="checkbox"/> Voice - SIP Service - 9198510003	1	
<input checked="" type="checkbox"/> Voice - SIP Service - 9198510004	1	

 9198510004
Voice - SIP Service

View Provisioning 

Show All

SIP

Persistent Profile ^{\$}

Subscriber Group ^{\$}

Signaling Type ^{\$}

Number Status ^{\$}

Line Name

Device MAC Address

Device Description

SIP User Name

Individual Line

Basic Subscribers

SIP

Normal

3 Reverse Service Penalties Workflow Action

A new *Reverse Service Penalties* action has been added to Workflow to support reversing penalties applied during final billing when reconnecting an account or service. The new action lets you configure the number of days the account or service is eligible for reversal of penalties (Eligibility Days). You can also configure the Disconnect Reason to reverse Early Termination Fees (ETFs) associated with contract penalties, the Adjustment Type used to reverse ETFs, and Adjustment Type to reverse Installment plan balances.

The action is designed to work in conjunction with the *Billing Order Processed* trigger. The system will look up the services assigned to the reconnection order and perform the following updates:

- Reverse contract penalties associated with services assigned to the reconnect order. The system will look up the contract penalties invoiced to the services on the reconnect order and apply an adjustment to the invoice that generated the penalty.
- Reverse the fees associated with the installment plan balance. The system will look up the installment plan balance fees associated with services on the reconnect order and apply an adjustment to the invoice that generated the penalty.
- Restore the installment plan with the number of months left at the time of disconnection. Missed installments are moved to the end of the original installment plan. For example, if the service is being reconnected after being disconnected for two months, the system will add two months to the end of the installment plan.

The Reverse Service Penalties action is listed in the Actions list under Orders.

Orders

Billing System Update

Adds or updates items in the billing system based upon the contents of the specified cart.

Complete Order

Sets the status of the specified cart to Completed.

Force Complete Billing Order

Forces a billing order to complete and cancels all running execution plans.

Process BTA Adjustments

For an Order, including Direct Invoice orders, create adjustments to capture any open BTA tenders.

Resubmit Billing Order

A work item that resubmits a billing order.

Reverse Service Penalties

Create credit adjustments based on an order reconnecting services, of a specific disconnect reason. The early termination fees and installment charges for these services will be reversed if they fall between the reconnect date and the eligibility days preceding it. ServicesIDs must be specified in a comma delimited list.

Set End Date

A work item that will set the Service and Feature End Date using the values specified.

Example Configuration:

Configure Trigger

Name*

Reverse Services Penalties

Description

Enabled

☒

Billing Order Processed

+ GROUP

+ CONDITION

Filters

All of the following:

Action

=

Reconnect

OrderTypeID

=

1000

StatusID

=

5

DELETE

Reverse Service Penalties

CHANGE

Parameters

OrderID *

@[OrderID]

ServiceIDs

Eligibility Days *

90

Disconnect Reason *

Non Payment Disconnect

Reconnect Date

@[System.CurrentDateTime]

Reverse ETF *

Yes

ETF Adjustment Type

CANCELLATION PENALTY

Reverse Installments *

Yes

Installment Adjustment Type

COURTESY ADJUSTMENT

SAVE

CANCEL

Billing Order Trigger Configuration:

- Set the Action to **Reconnect**.
- Set the OrderTypeID based on the Order Type used for reconnects. Use the specific value that fits your application.
- Optionally, you can use the Order Status field to determine when you want the trigger to fire. For example, fire the trigger when the order status is set to In-Process or once the order is Completed. Order Status ID values:

Status	StatusID
Assembling	0
On Hold	1
Incomplete	2
Submitted	3
In-Process	4
Completed	5
Canceled	6

Reverse Service Penalties Action Configuration:

Order ID (required)	Recommended to use the @[OrderID] data field to pull in the order number of the reconnection order.
ServiceIDs	ServiceIDs is an optional field that can be used with data lookups. The action would run on specific services in the order instead of all services in the order.
Eligibility Days (required)	Number of days the account or service is eligible for reversal of penalties (Eligibility Days).
Disconnect Reason (required)	Select a reason from the drop down list.
Reconnect Date	Defaults to current date and time. Enter a date. Note: You can use a dynamic injection variable or static date that will not change.
Reverse EFT (required)	Specifies whether or not to reverse early termination fees. Select Yes or No .
EFT Adjustment Type	Required if Reverse EFT = Yes. Select the adjustment type to use if you choose to reverse EFTs.
Reverse Installments (required)	Specifies whether or not to reverse installment payments. Select Yes or No .
Installment Adjustment Type	Required if Reverse Installments = Yes. Select the adjustment type to use if you choose to reverse EFTs.

4 Use Balance to Date on Retrying a Declined E-Pay Transaction

Since CostGuard version 20.5 the system has supported setting up an automated action for declined E-Pay transactions. This functionality must be enabled and configured in Customer Care.

E-Pay Transactions	Take Action on Declined E-Pay Transactions	<input checked="" type="checkbox"/> ENABLE
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This release (22.3) provides a new configuration option that lets you direct the retry logic to use *the balance to date* on the account rather than the original transaction amount. The *Balance to Date* is the Total Balance which includes posted charges (debits) and payments/credits that have not yet been invoiced for the account.

Configure Action Taken on Declined E-Pay Transactions

STANDARD
ADVANCED

Number Of Retries*
2

Days Between Retries*
0

Don't Evaluate After X Days*
30

Use Balance To Date*
☐

Frequency*
Daily

Every*
1
Day(s)

At*
12:00 AM
America/New York (-05:00)

SAVE
CANCEL

Note: This functionality is described fully in the article on *Automated Action on Declined E-Pay Payments* in the IDI Knowledge Center.

5 Bulk Import for Device Records

The Bulk Data module allows users to import and update data in the CostGuard system using a comma separated file (CSV). With version 22.3, this module supports bulk adding and modifying device records. Rather than using the existing CostGuard Client Device or Samsung Manifest File Upload utilities, the Bulk Data Import method reduces the likelihood of syntax errors and makes it easier to create and manage import files.

You can search and view successfully imported Device records via CostGuard Client Device Management (Applications > BackOffice Management)..

5.1 GENERAL FORMAT

The following general rules apply to device import files:

- File naming convention must be *.csv.
- A header is required.
- The header must be followed by one or more comma-delimited detail records.
- Non-required fields can be empty.
- The columns are not required to be in a specific order. The order for a specific file is defined by the header record.
- You do not have to include all columns in an import file.

5.2 IMPORT IDENTIFIER

The first row of the file must have the file format identifier, starting in the first position of the first row. For device import files the identifier is:

FORMAT:IDI/CostGuardBulkData/Device

Note: "Format:" is part of the identifier and must be included.

5.3 HEADER RECORD

The second row of the import file must contain the column names to be included in the file. The column names are listed in the Record Layout section of this document. The columns do not need to be in a specific order. Import files do not need to include all columns; only those that contain data to be imported. The column names must match exactly as listed in the layout section.

5.4 CLEAR VALUES

The *modify* action lets you clear previously set data. To clear data, set the record value to the following: @[System.Clear]

Note: Attempts to clear data for fields that are Yes/No data type or required, will result in an errored record.

5.5 RECORD LAYOUT

Field	Data Type	Required for Create	Required for Modify	Description
Action	Text	No	Yes	Operation to perform on a device. Valid Values: Create or Modify . When not specified, the action defaults to Create .
AKey	Text	No	No	Authorization key.
SerialNumber	Text	See note		Device serial number. The device must have either a serial number or alternative serial number. Based on the SerialNumberTypeID this value will be: DEC ESN or DEC MEID or IMEI Note: This field is required when AlternateSerialNumber is not specified.
AlternateSerialNumber	Text	See note		Alternate representation of the device serial number. Note: This field is required when SerialNumber is not specified and is ignored when SerialNumber is specified.
Bind	Boolean	No	No	Indicates whether or not the device is currently bound to a service number.
BlackBerryRegistrationID	Text	See note		ID as received from manufacturer. Note: Required for adding a Blackberry device.
DecimalPseudoESN	Text	No	No	Decimal representation of the ESN.
HexPseudoESN	Text	No	No	Hex representation for the ESN.
DeviceStatusID	Integer	No	No	Status of the device. 1 =Active, 2 =Inactive, 3 =Stolen Other statuses may be defined via Backoffice > Device Management.
DeviceStatusException	Text	No	No	Semicolon-delimited list of device status values to <i>not</i> replace on a modify action. Device Status will not be modified if the current value is one of the values in this list.

EID	Text	No	No	For use with eSIMs, the EID (Embedded Identity Document) is a unique identifier built into the device.
HandsetCatalogID	Integer	Yes	No	Unique identifier of the device's product catalog value. Note: This field is required when TechnologyTypeID is not specified.
HandsetCatalogIDException	Text	No	No	Semicolon-delimited list of handset catalog ID values to <i>not</i> replace on a modify action. The ID will not be modified if the current value is one of the values in this list.
TechnologyTypeID	Integer	See note	No	Unique identifier for the device's technology type as set in the Product Catalog (<i>Technology</i> field). 1 =CDMA/TDMA, 2 =GSM, 4 =Dual Mode (CDMA+SIM) Note: This field is required when Handset Catalog ID is not specified and is ignored when Handset Catalog ID is specified.
HandsetSKU	Text	See note	No	Device SKU as defined in the Product Catalog. Note: This field is required when HandsetCatalogID is not specified and is ignored when HandsetCatalogID is specified.
HandsetSKUException	Text	No	No	Semicolon-delimited list of SKUs to <i>not</i> replace on a modify action. The SKU will not be modified if the current value is one of the values in this list..
HardwareVersion	Text	No	No	Version of the device's hardware.
HardwareVersionException	Text	No	No	Semicolon-delimited list of version values to <i>not</i> replace on a modify action. The version will not be modified if the current value is one of the values in this list.
MSL	Text	No	No	Mast Subsidy Lock value.
MSLException	Text	No	No	Semicolon-delimited list of MSL values to <i>not</i> replace on a modify action. The MSL will not be modified if the current value is one of the values in this list.

OneTimeSL	Text	No	No	One time SL number for the device.
OneTimeSLException	Text	No	No	Semicolon-delimited list of OneTimeSL values to <i>not</i> replace on a modify action. The OneTimeSL will not be modified if the current value is one of the values in this list.
PIN	Text	No	No	PIN associated with the device.
ReservedForRetail	Boolean	No	No	If true, will mark the device as reserved for retail.
SID	Text	No	No	System Identification Number for the device.
SIMCardNumber	Text	No	No	ID specific to a SIM card as provided by the SIM card dealer.
SoftwareVersion	Text	No	No	Software version the device is on.
SoftwareVersionException	Text	No	No	Semicolon-delimited list of software version values to <i>not</i> replace on a modify action. The software version will not be modified if the current value is one of the values in this list.
SourceCode	Text	See note		The device's source code. Note: This field is required when SourceCodeID is not specified and is ignored when SourceCodeID is specified.
SourceCodeException	Text	No	No	Semicolon-delimited list of source code values to <i>not</i> replace on a modify action. The source code will not be modified if the current value is one of the values in this list.
SourceCodeID	Integer	See note	No	Unique identifier for the device's source code. 1 =Coupon, 2 =Inbound, 3 =Online, 4 =Outbound, 5 =Other Note: This field is required when SourceCode is not specified.
UpdateActiveServices	Boolean	No	No	If true, update the device's active services.

6 Inventory OmniSearch - Search and Sort by Owner

This adds a sortable *Owner* field to the Equipment Inventory OmniSearch results, as well as a drop down to filter by *Equipment Owner* in the search criteria.

Equipment Search ♥

🔍 Enter an Equipment Name or Reference Number 🔍

Inventory
Site

Equipment Type

Equipment Owner

Status
CLLI Code

[Fewer Options](#)
[Clear Options](#) SEARCH

Name ^	Type	Inventory	Status	Site	Reference Number	CLLI	Cost	Owner
RR01-MP12-TA750	Intgrated Access D...	Equipment Inventory	Available	Sprint				Test
RR01-MP12-TA750...	FXS/FXO Card	Equipment Inventory	Available	Sprint				Test
RR01-MP12-TA750...	FXS/FXO Card	Equipment Inventory	Available	Sprint				Test
RR01-MP12-TA750...	FXS/FXO Card	Equipment Inventory	Available	Sprint				Test
RR01-MP12-TA750...	FXS/FXO Card	Equipment Inventory	Available	Sprint				Test
RR01-MP12-TA750...	FXS/FXO Card	Equipment Inventory	Available	Sprint				Test
RR01-MP12-TA750...	FXS/FXO Card	Equipment Inventory	Available	Sprint				Test
RR01-MP12-TA750...	FXS/FXO Card	Equipment Inventory	Available	Sprint				Test
RR01-MP12-TA750...	FXS/FXO Card	Equipment Inventory	Available	Sprint				Test
RR01-MP12-TA750...	FXS/FXO Card	Equipment Inventory	Available	Sprint				Test
RR01-MP12-TA750...	FXS/FXO Card	Equipment Inventory	Available	Sprint				Test
RR01-MP12-TA750...	FXS/FXO Card	Equipment Inventory	Available	Sprint				Test
RR01-MP12-TA750...	FXS/FXO Card	Equipment Inventory	Available	Sprint				Test



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