

# 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/	FR 3430	Copy provisioning data when assigning service numbers
Provisioning		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	AR 8956	Use balance to date on retrying a declined E-Pay transaction
Processing		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 the balance to date on the account rather than the original transaction
		amount. The <i>Balance to Date</i> is the Total Balance which includes posted charges
Pulk Import	AR 8885	(debits) and payments/credits that have not yet been invoiced for the account.
Bulk Import	AK 0003	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
	A.D. 0005	Device Management (Applications > BackOffice Management).
Equipment	AR 8985	Search and sort by owner in Equipment Inventory OmniSearch
Inventory Web Module		This adds a sortable <i>Owner</i> field to the Equipment Inventory OmniSearch results,
vveb Module	ĺ	as well as a drop down to filter by <i>Equipment Owner</i> in the search criteria.



Functional AR/FR Area		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.

<b>Functional Area</b>	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: Only one instance of an EID is permitted in the device table.
		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	• 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



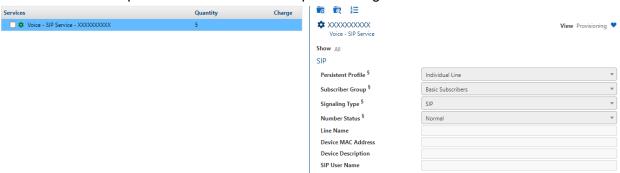
Functional Area	PR	Description				
		In some cases, clicking a Journal ID in the Journal OmniSearch results would take you to the Journal page for the account, as expected; however, the journal would not be displayed.  This display issue has been fixed.				
Security 83835		Search field in Add User Roles 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.				



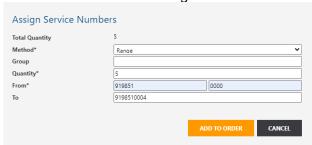
# 2 Copy Provisioning Data when Assigning Services in Orders

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:

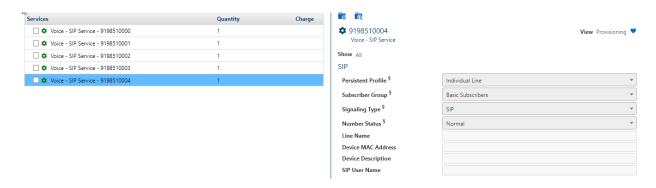
Add a template service and save the provisioning data.



Choose the method to assign service numbers.



• When the service numbers are assigned, the provisining data is copied to the replicated services.





## **3 Reverse Service Penalties Workflow Action**

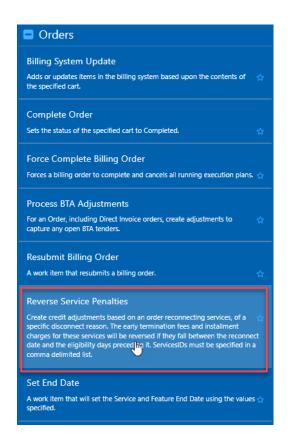
A new *Reverse Service Penalties* action has been added to Workflow to support reversing penalties applied during final billing when reconnecting an account or service. The new action lets you configure the number of days the account or service is eligible for reversal of penalties (Eligibility Days). 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:

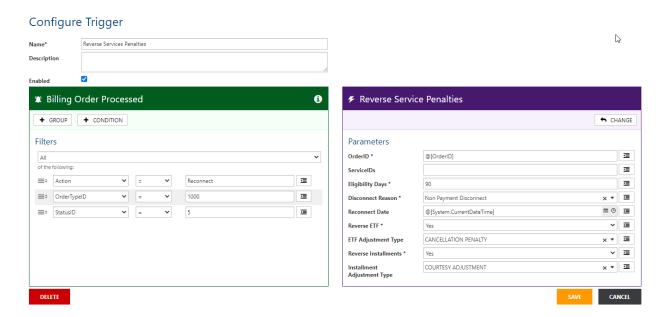
- Reverse contract penalties associated with services assigned to the reconnect order.
   The system will look up the contract penalties invoiced to the services on the reconnect order and apply an adjustment to the invoice that generated the penalty.
- Reverse the fees associated with the installment 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.



#### **Example Configuration:**





## **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				
ServiceIDs	number of the reconnection order.  ServiceIDs is an optional field that can be used with data lookups.				
Serviceros	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. <b>Note</b> : 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 <b>Yes</b> or <b>No</b> .				
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 <b>Yes</b> or <b>No</b> .				
Installment Adjustment Type	Required if Reverse Installments = Yes. Select the adjustment type to use if you choose to reverse EFTs.				

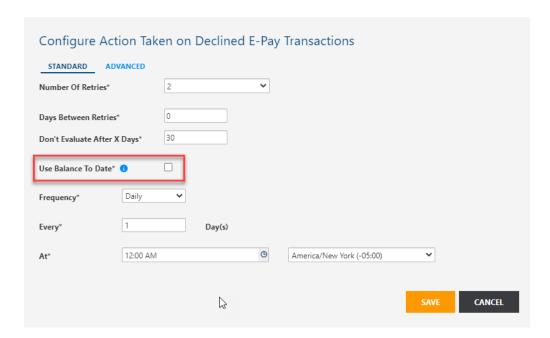


# 4 Use Balance to Date on Retrying a Declined E-Pay Transaction

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.



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.



**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: <b>Create</b> or <b>Modify</b> . When not specified, the action defaults to <b>Create</b> .
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
				<b>Note</b> : This field is required when AlternateSerialNumber is not specified.
AlternateSerialNumber	Text	See note		Alternate representation of the device serial number.
				<b>Note</b> : 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. <b>Note</b> : 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.
				<b>1</b> =Active, <b>2</b> =Inactive, <b>3</b> =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. <b>Note</b> : 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). <b>1</b> =CDMA/TDMA, <b>2</b> =GSM, <b>4</b> =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. <b>Note</b> : 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 not 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.
				<b>Note</b> : 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.

