

Core Release Bulletin

CostGuard Solution *22.8 Release*

August 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
Customer Care	AR 8924	<p>Automate clearing tax jurisdiction override on address change</p> <p>Tax jurisdiction for an account is determined through address validation. When the address that determines tax jurisdiction is changed, any existing tax jurisdiction override related to that account or service should be evaluated and removed if the new address is physically in a different tax jurisdiction than the previous address. Failure to remove overrides that are no longer applicable following an address change can result in charging taxes incorrectly.</p> <p>Prior to this functionality, service representatives were responsible for evaluating and clearing tax jurisdiction overrides when appropriate. Now, you can configure the system to automate this process. This can reduce mistakes and help ensure taxes are charged correctly following an address change. This functionality is controlled by a new setting in Customer Care which is disabled by default.</p>
Orders	AR 9054	<p>Cost override on non-inventoried direct invoice items</p> <p>Users with <i>Cost Override</i> permission can set the cost of a non-inventoried direct invoice item (override the default cost) during order assembly. This can be beneficial when selling a non-inventoried direct invoice item where the item's cost can vary from one order to another. The flexibility to set the cost for an item on an order-by-order basis helps ensure the profit margin for the item on each individual order is calculated accurately. This calculation is done outside the CostGuard system.</p>
RateBill	AR 8883	<p>Prorated product dynamic charge enhancement</p> <p>The Dynamic Charge wizard in the Product Catalog provides a new <i>Prorated Product Charge</i> option (similar to the existing <i>Charge</i> option) that supports prorating for items with a dynamic (sliding scale) price. This lets you account for mid-period changes and prorate the charge for a product based on the active features throughout the month. For example, you can dynamically calculate in arrears the charge for a data package where the price is based on the quantity of specific SKUs on an account across services. The calculation takes into account proration for adds and disconnects done throughout the bill period.</p>

Functional Area	AR/FR	Description
RateBill	AR 8961	<p>XML output for separating mandatory and non-mandatory taxes</p> <p>The Wireless New Charges XML optional report can be configured to separate taxes into <i>Mandatory</i> and <i>Non-Mandatory</i> sections. A service request must be submitted to enable this functionality as the settings are located in the Config Console and are not available to CostGuard users. When enabled Service and Customer level taxes will output within the XML into <i>Mandatory</i> and <i>Non-Mandatory</i> sections. All Extended Tax products will go into the <i>Non-Mandatory</i> sections.</p>
Reports	AR 9032	<p>Invoice Tax Details Audit report</p> <p>This Adaptive Request makes the custom report, <i>Invoice Tax Details-Enhanced</i>, a core report available in Report Explorer. The report is renamed as <i>Invoice Tax Details Audit</i> and is available in the Audit>Taxes folder in Report Explorer.</p> <p>This report facilitates auditing calculated taxes after billing processes have completed. The results help experienced personnel confirm invoiced items were taxed correctly (or not). The report provides insight into taxation details down to the service-level. An example application is to audit the taxation from the roll-out (and billing) of new service-level Products and Packages.</p>

1.2 RESOLVED KNOWN ISSUES

The following known issues have been resolved in this release.

Functional Area	PR	Description
Bulk Data Import - Journals	83997	Bulk Data trigger action is not creating journals The <i>Journal Created</i> workflow trigger was not firing when a journal was created via Bulk Data Journal import. This issue has been fixed so that the trigger fires for each journal created using the Bulk Data import.
Orders	84083	Order performance issues During an account feature import, timeouts were reported from the Order Placement web service, causing the orders to fail. The performance issues were found in two stored procedures and were fixed as follows: <ul style="list-style-type: none"> The first problematic stored procedure was updated to only check for <i>family</i> products if the customer's database has any configured (so if family products aren't used, the stored procedure won't waste time querying them all). The second stored procedure was timing out after 1 minute, when the default for Web Services should be 10 minutes. This was updated to allow the procedure enough time to complete properly before timing out.
CostGuard Client – Journal Search	84081	CostGuard Client journal search error: database exception Attempting to use journal search in CostGuard Client (Customer Management > Journal Search) caused an error - Error message: <i>InfoDirections.DataTypes.DatabaseException: (IDI30001) The incoming request has too many parameters. The server supports a maximum of 2100 parameters. Reduce the number of parameters and resend the request. (System.Data.SqlClient.SqlException)</i> This error was related to running the search for a user group, with the Include Group Members option checked. This issue has been fixed.
CostGuard View PDF	84124	PDF viewer fix When testing for FR3433 (related to web login via Microsoft Edge and provided in CostGuard 21.12), it was found that when you chose to view an Invoice PDF multiple times it would cause CostGuard Client to freeze and eventually post an error message. This was due to the logic around opening PDFs where it waits on a response for invoice generation. The logic for opening PDFs was modified to wait on the response and also disable export buttons until the invoice has been retrieved.

Functional Area	PR	Description
Communications - Notifications	84010	View notifications error For environments that are not configured to use the CostGuard Communications module, an error occurs when viewing a notification from the Notifications tab in CostGuard Client and from the Notifications page in Customer Care. This issue has been resolved.
Provisioning Infrastructure	83780	Provisioning web service required updated messaging dependency Fixed an issue where Switch Query functionality on a service in Customer Care was not returning the results.
RateBill	84005	Billing performance improvement The Billing process can take a long time to bill customers who have many services and service addresses. The process has been optimized to improve the performance around handling large amounts of services and service addresses.
RateBill	84008	XML to PDF custom font fix The custom font functionality was not property pulling all font definitions from the external css file, consequently not allowing use of custom fonts. The logic was updated to pull all definitions.

2 Automate Clearing Tax Jurisdiction Overrides on Address Change

Tax jurisdiction for an account is determined through address validation. When the address that determines tax jurisdiction is changed, any existing tax jurisdiction override related to that account or service should be evaluated and removed if the new address is physically in a different tax jurisdiction than the previous address. Failure to remove overrides that are no longer applicable following an address change can result in charging taxes incorrectly. Prior to this functionality, service representatives were responsible for evaluating and clearing tax jurisdiction overrides when appropriate. Now, you can configure the system to automate this process. This can reduce mistakes and help ensure taxes are charged correctly following an address change.

When a change is made to an address used for taxing purposes, if any Tax Jurisdiction Overrides are associated with the address, they will be automatically cleared. The Tax Jurisdiction Override will only be cleared if the updated address falls in a different tax jurisdiction than the previous address.

This functionality is controlled by a new setting which is disabled by default. When enabled this functionality applies whether the address change is made in CostGuard Client or Customer Care and applies to the following addresses:

- Primary Customer Contact
- Service Contact
- Service Address (when editing from the context of an account or a service). This functionality **does not apply** when changes are made to service addresses from Service Address Management (client) or Manage > Service Addresses (Customer Care).

Audit Log entries will show when the tax jurisdiction override is cleared in this way.

2.1 SETUP

A new configuration option in Customer Care **MANAGE > Settings > Taxes** lets you toggle this functionality on or off. The functionality is off by default. To enable, click the associated edit (pencil) icon and then check the check box and click **SAVE**.



3 Prorated Product Dynamic Charge Enhancement

This solution supports prorating for products with a dynamic (sliding scale) price. This lets you account for mid-period changes and prorate the charge for a product based on the active features throughout the month. For example, you can dynamically calculate in arrears the charge for a data package where the price is based on the quantity of specific SKUs on an account across services. The calculation takes into account proration for adds and disconnects done throughout the bill period.

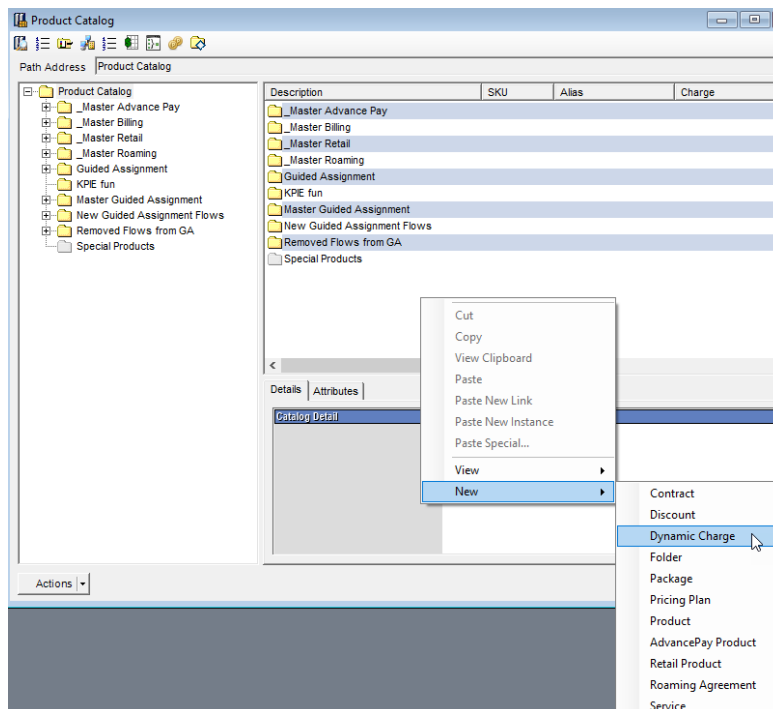
This solution provides the following enhancements:

- In the Product Catalog, the Dynamic Charge wizard provides a new *Prorated Product Charge* option to configure a dynamic charge that represents a sliding scale price for a data package.
- The Invoice Preview function in Customer Care lets service representatives review these charges with their customers and answer any questions they may have.
- Bills generated by the CostGuard system accurately calculate dynamic charges for sliding scale data packages that require proration for mid-cycle adds and disconnects.

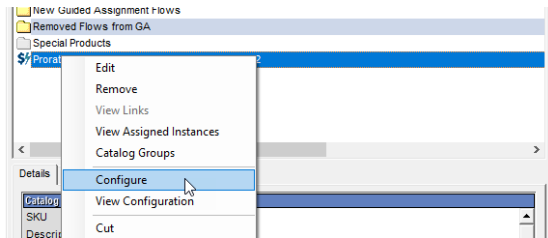
3.1 CONFIGURING A PRORATED DYNAMIC CHARGE

This process is similar to configuring any dynamic charge in the Product Catalog, with some special considerations.

- Start by creating a new dynamic charge.



- After saving, choose to configure the dynamic charge.



- In the wizard, for *Dynamic Charge Type* choose the **Prorated Product Charge** option.

Dynamic Charge Wizard

Dynamic Charge Type
Specify whether your dynamic charge is a Charge, Round Up, Periodic Usage Charge, or Prorated Product Charge type.

Please select a dynamic charge type

☐ Charge
A charge will be applied to the customer account.

☐ Round Up
Round up amount will be added to the invoice to make the total amount due a whole number.

☐ Periodic Usage Charge
Once per day, a non-recurring charge will be applied to the customer's account.

☒ **Prorated Product Charge**
Calculate a charge amount based on the quantity of contributing products.

< Back Next > Cancel

- When the **Prorated Product Charge** option is selected, the Dynamic Charge configuration wizard will only allow for entry of the contributing products and tiers. These are the only forms presented in the wizard. There is no support for Usage (Usage Types, Service Types, Distance Types, Orig Locations or Term Locations).
 - Prorated Product Charge can only apply for products where contributing (as configured in the wizard) and eligible products (assigned the dynamic charge) are the same.
 - When adding tiers, the following rules apply:
 - Tier Units = Quantity
 - Tier Type = Single
 - Amount Type = Constant Amount

3.2 BILLING A PRORATED PRODUCT DYNAMIC CHARGE

When a Prorated Product Charge is billed, the charge amount calculation is based on the quantity of active contributing products throughout the bill period (in arrears). The calculation does not support charging in advance.

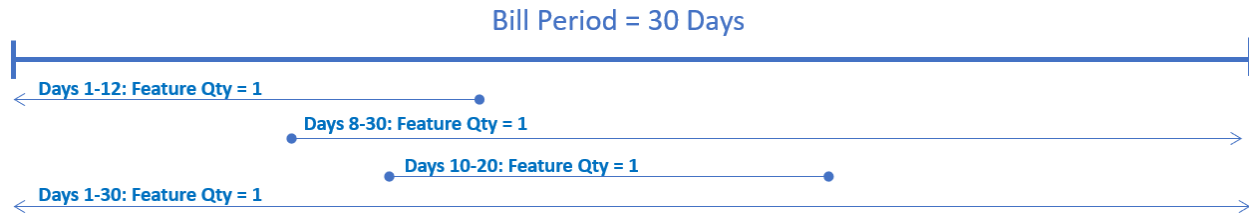
The following rules apply:

- The configured tiers in the Dynamic Charge configuration are used to determine the charge amount based on the quantity of contributing products for active features.
- The start and end dates of the features are evaluated to determine the number of days for each applicable tier.
- When more than one tier applies within the bill period, the tier amount is prorated based on the number of days it was applicable.
- If the Prorated Product Charge is assigned at the service level, only features on the service are used for the charge calculation (consistent with existing Dynamic Charge functionality)
- If the Prorated Product Charge is assigned at the account level, features on the account and all services are used for the charge calculation (consistent with existing Dynamic Charge functionality)

Example Tiers:

Quantity	Constant Amount
1	\$55
2	\$100
3	\$110
4	\$120

- **Scenario 1:** Three features are contributing products and active every day of the bill period.
 - Charge = \$110
- **Scenario 2:** Two contributing products are active every day of the bill period (tier amount = \$100). A third product is added and active the last 10 days of the bill period (tier amount = \$110). There are 30 days in the bill period.
 - Charge = $(20/30 * \$100) + (10/30 * \$110) = \$103.33$
- **Scenario 3:** Two contributing products are active at the beginning of the bill period. One is disconnected after 15 days. There are 31 days in the bill period.
 - Charge = $(15/31 * \$100) + (16/31 * \$55) = \$76.77$
- **Scenario 4:** Complex example of four features which are contributing products, active various days within a bill period:




- Charge Calculation Breakout:
 - Days 1-7: Qty = 2
 - Days 8-9: Qty = 3
 - Days 10-12: Qty = 4
 - Days 13-20: Qty = 3
 - Days 21-30: Qty = 2
 - Qty 2 for 17 Days $(17/30 * \$100) = \56.6667
 - Qty 3 for 10 Days $(10/30 * \$110) = \36.6667
 - Qty 4 for 3 Days $(3/30 * \$120) = \12.00
 - Total Charge = \$105.33



3.3 INVOICE PREVIEW IN CUSTOMER CARE





The *Invoice Preview* function in Customer Care (Billing > Invoices) lets service representatives review prorated dynamic charges with their customers and answer any questions they may have.



- When a sale is made that impacts a Prorated Product Dynamic Charge, the invoice preview accounts for the sale when calculating the charge amount.
- When a disconnect is done that impacts a Prorated Product Dynamic Charge, the invoice preview accounts for the disconnect when calculating the charge amount.




The dynamic charge amount is calculated based on the quantity of contributing products and their start and end dates at the time the invoice preview is generated.





CostGuard 22.09  

 NEW ORDER
  START WORKFLOW
  QL TEST
  ASDF


 Hunter  09)






Account ▾
 Billing ▾
 Services ▾
 Orders ▾
 POS ▾
 Documents



 Live
  Not Verified

Invoice Summary

 Compare
 View ▾

Invoice 21658207 (January 15, 2013)  Preview

January 15, 2013 ▾

Previous Amount Due	4,564.84
Balance Forward	4,564.84
Total New Charges	4,550.45
My Charges	4,550.45
Finance Charges	68.47
Usage	55.85
Recurring Charges	3,792.89
Non-Recurring Charges	0.00
Taxes	633.24
Due February 11, 2013	9,115.29

Recurring Charges: 3,792.89

SUMMARY

DETAIL

SKU	Description	Quantity	Total Charges ▾
150161	Prorated Product Charge	56	1,960.00
150221	SIP AnyWare Local Loop - GLBX	1	1,359.25
150222	SIP AnyWare IP Port - GLBX	1	304.75
0212MAWADV5330	5330 Advanced User Seat Package	2	70.00
Equip - iNOC	Router	1	45.00
2433	800 Service Charge - Access Line	8	31.60
2545	WebFax Mailbox Charge - Access Line	2	9.90
EQA	PICC - Business /MCI	1	4.31
MAWADDID	Additional DID	1	4.13
1015	TF - Service Charge	1	3.95
150158	SIP Anyware DID - Accessline	56	0.00
150159	SIP Anyware Station Trunk - Accessline	55	0.00
150220	AnyWare IP Bundle - GLBX	1	0.00
EdgeWatch5.01-25MB	EdgeWatch - 5.01 to 25 MB	1	0.00
CoreWatch1-100Users	CoreWatch 1 - 100 Users	1	0.00

4 Cost Override on Direct Invoice Order Line Items

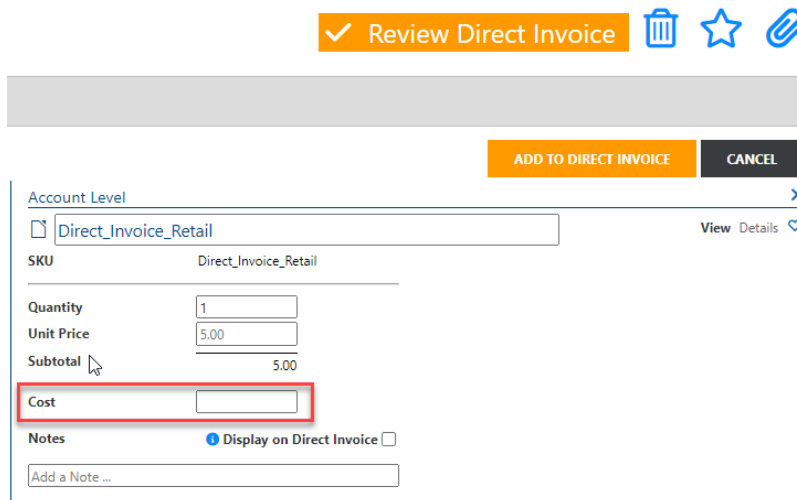
Users with *Cost Override* permission can set the cost of a non-inventoried direct invoice item (override the default cost) during order assembly. This can be beneficial when selling a non-inventoried direct invoice item where the item's cost can vary from one order to another. The flexibility to set the cost for an item on an order-by-order basis helps ensure the profit margin for the item on each individual order is calculated accurately. This calculation is done outside the CostGuard system.

4.1 Permissions

There are no *new* permissions required to use this functionality; however, users that require this capability must be assigned a role that has both the *Show Cost* and *Override Cost* permissions to view and modify the cost.

4.2 How it Works

On a *Direct Invoicing* transaction, when staging a *non-Inventoried* direct invoice item, the Cost value is visible and editable for users with the above permissions. This is also the case when a non-inventoried direct invoice item already added to the transaction is reviewed and edited (via the pencil icon) in the order details pane.



The screenshot shows a web interface for reviewing a direct invoice. At the top, there is an orange button labeled "Review Direct Invoice" with icons for trash, star, and edit. Below this is a grey bar. Underneath, there are two buttons: "ADD TO DIRECT INVOICE" (orange) and "CANCEL" (black). The main form area has a header "Account Level" with a close button. Below the header, there is a search bar containing "Direct_Invoice_Retail" and a "View Details" link. The "SKU" is also "Direct_Invoice_Retail". The form includes fields for "Quantity" (1), "Unit Price" (5.00), and "Subtotal" (5.00). The "Cost" field is highlighted with a red box and is currently blank. Below the "Cost" field, there is a "Notes" section with a checkbox labeled "Display on Direct Invoice" and a text input field for adding a note.

Notes:

- The default Cost value as set in the Product Catalog is not shown. The field is blank initially because the value is not calculated until the item is added to the order.
- The Cost field is not available for *inventoried* retail items.

- On entering a value in the Cost field, the undo arrow icon is available if you need to undo the cost override.

✓ Review Direct Invoice
🗑️
★
🔗

ADD TO DIRECT INVOICE
CANCEL

Account Level
✕

📄 Direct_Invoice_Retail

[View Details](#)

SKU
Direct_Invoice_Retail

Quantity

Unit Price

Subtotal

5.00

Cost

↶

Notes
🔔 Display on Direct Invoice ☐

Add a Note ...

Note The Cost value is not a factor in the Subtotal and only applies when calculating profit margin (done outside the CostGuard system).



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