

# Core Release Bulletin

***CostGuard Solution  
22.12 Release***

December 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 3411	<p><b>Web Sales milestone 2 – support for locations &amp; registers</b></p> <p>This milestone (in combination with AR 9106 below) provides an enhanced web transaction experience and new starting block functionality. You can initiate an order, sale, or direct invoice transaction that requires a <i>retail location</i> and <i>register</i>. You can do this by either:</p> <ul style="list-style-type: none"> <li>Configuring the specific register and location on the starting block. In this case the selected starting block sets the register/location for the transaction without user involvement.</li> <li>Applying the location and register from the user's specified <i>My Location</i> as set via the Orders web module application tray.</li> </ul> <p>Applying a register and its location to a transaction lets you:</p> <ul style="list-style-type: none"> <li>Add a retail product according to its defined location availability, unit price and cost. When added, you can also apply or modify: <ul style="list-style-type: none"> <li>A retail discount (either manually or by a retail promotion).</li> <li>Sales and/or use taxes based on the location.</li> <li>An installment plan based on configured profiles and rules, when applicable.</li> </ul> </li> <li>Accept tender types for the calculated amount due now based on the location's register policy. The system will prompt for additional tendering details, when applicable.</li> <li>Have receipt or direct invoice generated for the transaction.</li> <li>Email the generated receipt or direct invoice to the customer as a message or notification using IDI's Communication web module.</li> </ul> <p>Leveraging these enhancements, you can use a transaction in the Orders web module to either sell, order, or direct invoice any post-paid billing and/or retail catalog item for any service or account. For details regarding the overall goal, objectives, and planned future deliverables for web sales, refer to the IDI Knowledge Center &gt; CostGuard Updates &gt; Upcoming Features page.</p> <p><b>Note:</b> If the starting block and/or direct invoicing solutions are not currently enabled in your system, functionality described above will not be visible in your system.</p>

Functional Area	AR/FR	Description
Product Catalog – Starting Block Configuration	AR 9106	<p><b>Starting block enhancements for web sales</b></p> <p>Starting block configuration is facilitated by these enhancements:</p> <ul style="list-style-type: none"> <li>• Configuration parameters are presented on two tabs for cleaner presentation – <i>Main</i> and <i>Policy</i></li> <li>• The Policy tab includes options for receipt (sales) and invoice (direct invoice) presentation</li> </ul> <p>Details are provided in the section for <i>Web Sales Milestone 2 – Tendered Retail Transactions</i>.</p>
Service Number History	9075	<p><b>Accessing billing order ID from service number history</b></p> <p>The ID associated to a billing order (BillingOrderID in web APIs or SystemOrderID in CostGuard Client) can now be accessed from the Service Number History for use in reporting.</p> <p>When a service number history record is generated by an order, the ID is now recorded and can be accessed via:</p> <ul style="list-style-type: none"> <li>• CostGuard Client Service Number History when you choose to view <i>all</i> columns. The new column is labeled <i>SystemOrderID</i>.</li> <li>• <i>ServiceNumberHistory</i> OData in the Customer Web Service includes a <i>BillingOrderID</i> column for use in the web/APIs.</li> </ul>

Functional Area	AR/FR	Description
Payment Processing	FR 3453	<p><b>Support for Paymentus payment portal – milestone 1</b></p> <p>Integrating the CostGuard system with Paymentus and its PCI 3.0 compliant solutions enhances IDI's <i>full-web front office experience</i>. With this milestone, Customer Care and OnlineBill are updated to leverage the digital-payment experience provided by Paymentus solutions. On implementing this solution Paymentus will maintain e-pay accounts, tokens, and payment-related activity.</p> <p>In this release, existing electronic payment touchpoints in Customer Care and OnlineBill use a Single Sign-on solution that seamlessly navigate you from these IDI applications to a corresponding Paymentus solution:</p> <ul style="list-style-type: none"> <li>From an account in Customer Care, you navigate to the Paymentus <i>Agent Dashboard</i> to: <ul style="list-style-type: none"> <li>Make a payment for either the current account balance or an installment plan payoff.</li> <li>Add and manage digital wallets, payment accounts, and payment scheduling.</li> <li>Search and view payment history.</li> <li>Refund an existing payment.</li> </ul> </li> <li>From an account in OnlineBill, you navigate to the Paymentus <i>Customer Portal</i> to: <ul style="list-style-type: none"> <li>Make a payment for either the current account balance or an installment plan payoff.</li> <li>Add and manage digital wallets, payment accounts, and payment scheduling.</li> <li>Search and view payment history.</li> </ul> </li> </ul> <p>Maintaining synchronicity of payment-related information between the CostGuard system and Paymentus is performed by:</p> <ul style="list-style-type: none"> <li>A new scheduled job to create the <i>Paymentus Customer Information File</i>. This file contains account and billing details and is exported from the CostGuard system to Paymentus.</li> <li>API integration to update account balances and receive payment notifications. The notifications include completed payments and updates to payment scheduling.</li> </ul> <p><b>Note:</b> This functionality is not immediately available upon upgrading to the CostGuard 22.12 release or later. Customers will need to coordinate with IDI Support/Account Management and Paymentus to properly implement this functionality.</p>

## 1.2 RESOLVED KNOWN ISSUES

The following known issues have been resolved in this release.

Functional Area	PR	Description
Customer Care	84200	<b>Lag time displaying <i>Account</i> menu options</b> On opening an account, options for the Account, Billing, Services, and Orders menus were slow to display. These menus now load more efficiently.
Customer Care	84250	<b>Balances tab error related to invoice category functionality</b> This issue is related to FR 3452 that provides support of invoice categories in Customer Care. This feature was originally introduced in CostGuard version 22.10 with enhancements provided in CostGuard version 22.11. An issue was found where the Customer Care balances page would error when there were less than five (5) configured aging buckets. Consequently, this functionality has been disabled by default. The issue is fixed in the CostGuard 22.12 release; however, you'll need to contact IDI Customer Support if you need support for invoice categories to be enabled in your system.
Orders – CostGuard Client	84223	<b>Timeout error on attempting to move a service (SQL Server 2014)</b> Users still on SQL Server 2014 experienced timeouts when attempting to move services on very large accounts. The performance of the <i>move service</i> function in the CostGuard Client has been improved to help avoid time outs.
Orders – CostGuard Client	84224	<b>Voided order not reverting back to original plan</b> In the CostGuard Client, if an order disconnected a product, and that order is voided, it should reconnect the product. This process was encountering an error since the deployment of AR 8763 in CostGuard version 22.06. AR 8763 introduced enhancements to reverse service fees originally introduced in CostGuard version 22.3. Specifically it provided two options to process reconnects based on your business requirements. <ul style="list-style-type: none"> <li>Restart Billing Charges updates the start date on recurring billing charges to the reconnection date, giving you an option to bill for a partial month of service and recoup additional revenue.</li> <li>Exclude reconnecting previously invoiced one-time charges.</li> </ul> The process has been corrected so that products disconnected via client-based orders will be reconnected upon voiding the disconnect order.

Functional Area	PR	Description
Orders - Web	84261	<b>Issue reconnecting services on accounts with multiple previous disconnect orders</b> <p>There was an issue with reconnecting services where the account had more than one web-initiated disconnect order in its history. The logic would look at the oldest order and fail to reconnect services on the most recent disconnect order.</p> <p>The reconnect logic was updated to reconnect based on the most recent disconnect order on the account.</p>
Orders Web	84220	<b>Unable to reconnect service without an EID</b> <p>When reconnecting a service via the web, the Order web module did not allow the reconnection if the service did not have an EID. CostGuard Client allows services to reconnect with a null EID, which is the expected functionality.</p> <p>Reconnection of services in the web is now allowed when the EID is null.</p>
CostGuard Client Journal/Follow-up Search	84271	<b>Unexpected search results and errors</b> <ul style="list-style-type: none"> <li>• <b>On journal searches</b>, targeting specific <i>Entered By</i> or <i>Last Modified By</i> users was causing an error. This issue was addressed to no longer display an error.</li> <li>• <b>On follow-up searches</b>, targeting specific <i>Assigned To</i>, <i>Entered By</i>, or <i>Closed By</i> users, would return results for users within the groups for the selected users even when <i>Include Group Members</i> was not selected. This issue was addressed to only show follow-ups associated to the selected user(s) and not group members when <i>Include Group Members</i> is not selected.</li> </ul>
RateBill	84199	<b>Billing operation runs longer than expected</b> <p>The billing operation was inefficiently processing usage per service causing the operation to run long for the bill period. This affected accounts with high amounts of usage records for their services.</p> <p>The billing operation was updated to more efficiently calculate total usage for accounts and services when there is a high number of usage records.</p>
RateBill	84254	<b>Error on prorated product charge dynamic charges</b> <p>Prorated Product Charge dynamic charges would error the billing operation when processing contributing products that start before the bill period and end during the bill period.</p> <p>The billing operation has been updated to handle this scenario.</p>
Inventory	84264	<b>Inventory Automatic Updates scheduled job times out</b> <p>The performance of the Inventory Automatic Updates scheduled job has been enhanced when updating the status of MINs and Service Numbers to either <i>Assigned</i> or <i>Aging</i>.</p>



## 2 Web Sales Milestone 2 – Support for Locations and Registers

Web Sales is an ongoing development effort to provide a complete web-based solution for initiating the full scope of front office transactions including billing orders, tendered retail sales and direct invoice transactions. Functional milestones will be deployed over a series of CostGuard software releases where each subsequent release builds on the prior one.

For details regarding the overall goal, objectives, and planned future deliverables for web sales, refer to the IDI Knowledge Center > CostGuard Updates > Product Roadmap page.

This milestone provides an enhanced web transaction experience and new starting block functionality. You can initiate an order, sale, or direct invoice transaction that requires a *retail location* and *register*. You can do this by either:

- Configuring the specific register and location on the starting block. In this case the selected starting block sets the register/location for the transaction without user involvement.
- Applying the location and register from the user's specified *My Location* as set via the Orders web module application tray.

Applying a register and its location to a transaction lets you:

- **Add a retail product** according to its defined location availability, unit price and cost. When added, you can also apply or modify:
  - A retail discount (either manually or by a retail promotion).
  - Sales and/or use taxes based on the location.
  - An installment plan based on configured profiles and rules, when applicable.
- **Accept tender types** for the calculated amount due now based on the location's register policy. The system will prompt for additional tendering details, when applicable.
- **Have receipt or direct invoice generated** for the transaction.
- **Email the generated receipt or direct invoice** to the customer as a message or notification using IDI's Communication web module.

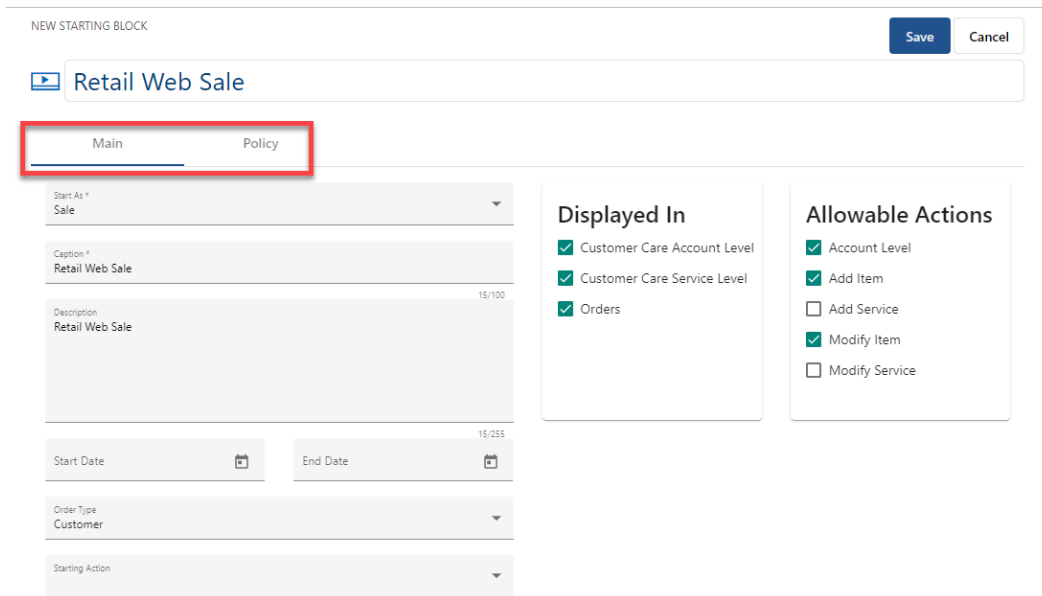
Leveraging these enhancements, you can use a transaction in the Orders web module to either sell, order, or direct invoice any post-paid billing and/or retail catalog item for any service or account.

### 2.1 ENABLING STARTING BLOCK FUNCTIONALITY

Web transactions (including Retail) require starting blocks to be enabled. There are two settings for enabling this functionality – one in the Orders web module and one in Customer Care. You must enable the Orders setting to use this functionality. The setting in Customer Care is also required if you want to use this functionality in Customer Care. Refer to the article on *Web Sales* in the IDI Knowledge Center for details.

## 2.2 STARTING BLOCK CONFIGURATION ENHANCEMENTS

New in the CostGuard 22.12 release, the New/Edit Starting Block form now presents configuration options on two tabs – *Main* and *Policy*.




The screenshot displays the 'NEW STARTING BLOCK' form. At the top right are 'Save' and 'Cancel' buttons. Below the title bar, a search bar contains 'Retail Web Sale'. Two tabs, 'Main' and 'Policy', are visible at the top of the form area, with 'Main' being the active tab. The 'Main' tab contains several configuration fields: 'Start As \*' (set to 'Sale'), 'Caption \*' (set to 'Retail Web Sale'), 'Description' (set to 'Retail Web Sale'), 'Start Date' and 'End Date' (both with calendar icons), 'Order Type' (set to 'Customer'), and 'Starting Action' (a dropdown menu). To the right of these fields are two panels: 'Displayed In' and 'Allowable Actions'. The 'Displayed In' panel has three checked options: 'Customer Care Account Level', 'Customer Care Service Level', and 'Orders'. The 'Allowable Actions' panel has five options: 'Account Level' (checked), 'Add Item' (checked), 'Add Service' (unchecked), 'Modify Item' (checked), and 'Modify Service' (unchecked).

- The fields presented on the *Main* tab (shown above) are described below.

<b>Name, Caption</b>	These fields are required. The text you enter here is displayed on the <i>Select Starting Block</i> form. The Caption should briefly describe the block's purpose.
<b>Description</b>	This field is optional. You can use it to provide additional notes. <b>Note:</b> This text is only displayed in the Product Catalog.
<b>Start As</b>	<p>This field is required. Use the drop-down menu to select the type of transaction to be initiated when you select this block. Select the type that supports the desired user experience:</p> <ul style="list-style-type: none"> <li>• <b>Order</b> – Items are added after the agreement and the customer is not present. For example, an order entry administrator enters transactions on behalf of sales associates or agents.</li> <li>• <b>Sale</b> – Items are added with the customer present. Sale transactions provide an additional <i>review cart</i> page that facilitates reviewing the sale with the customer. <b>Notes:</b> <ul style="list-style-type: none"> <li>▪ <i>Remote sales</i> (for example, by a call center representative) are supported through CostGuard version 22.12.</li> <li>▪ <i>In-store sales</i> using peripheral devices will be supported in a future deliverable.</li> </ul> </li> <li>• <b>Direct Invoice</b> – This must be selected when the block is intended to start direct invoice transactions.</li> </ul> <p><b>Note:</b> All transaction types support location, register, email and receipt/direct invoice options available on the <i>Policy</i> tab.</p>
<b>Start Date, End Date</b>	These date selectors are optional. You can use one or both to establish a date range when the starting block will be available on the Select Starting Block form. It will not be available before the start date, nor after the end date. Not entering a start date makes the block immediately available, and not entering an end date makes it available in perpetuity.
<b>Order Type</b>	This field is optional. You can use it to set a default order type. The type can be modified on the <i>Basic Information</i> page when you start a new transaction.
<b>Starting Action</b>	This field is optional. You can use it to set a default action for the transaction. The action can be modified on the <i>Basic Information</i> page when you start a new transaction.
<b>Displayed In</b>	<p>Use these check boxes to select where the starting block will be available for selection. This can be one or any combination of the:</p> <ul style="list-style-type: none"> <li>• Orders web module</li> <li>• Customer Care account-level</li> <li>• Customer Care service-level</li> </ul>
<b>Allowable Actions</b>	Use these check boxes to select which actions can occur within the transaction during assembly. This can be one or any combination of the listed actions.

- The fields presented on the *Policy* tab are shown and described below.

NEW STARTING BLOCK Save Cancel

 Retail Web Sale

Main Policy

### Location Options

Location  
Web Orders Store

Register  
Web Orders Register 1

☐ Is Register Required

### Email Options

Type  
Message Email

Email From Address  
tformicola@idibilling.com

Email Subject  
Email Receipt

☒ Prompt for Email Upon Submit

☒ Allow Email On Demand

☐ Only After Transaction Submitted

### Receipt Configuration

Receipt Template  
Default Network Receipt

Sale Footer

Logo Choose Logo

<p><b>Location Options</b></p>	<p>Location options can apply for any transaction type. Using a location and register supports assigning a unique receipt or direct Invoice number to the transaction.</p> <p>Specifying the location and register can be handled in two ways:</p> <ul style="list-style-type: none"> <li>• For <i>remote</i> (not in-store) transactions where sales associates are not required to use a specific location/register, you can specify a global <b>Location &amp; Register</b> using the respective drop-down menus. These menus are populated with locations and registers as configured in CostGuard Client POS Back Office. <b>Note:</b> When a <b>Location &amp; Register</b> are defined on the starting block, those settings are applied and take precedence over settings a user may enter via <i>My Location</i> in the Orders App tray.</li> <li>• For <i>in-store</i> transactions where sales associates must use their individual locations/registers, leave these fields undefined so as not to override settings entered via <i>My Location</i> in the Orders App tray. Also, check the <b>Is Register Required</b> check box. This will require sales associates to use the <i>My Location</i> option in the Orders app tray to select their location and register.</li> </ul> <p>For <i>Direct Invoice</i> transactions, you must set a Location and Register on the starting block. The <i>My Location</i> option is not applicable for direct invoice transactions.</p>
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<b>Email Options</b>	<p>These options support emailing a receipt (or direct invoice) for the transaction. The drop-down menu defaults to <b>No Email</b>. In this case, all related fields are disabled and there will be no options to email a receipt on completing the transaction. If you want to email a receipt, select one of these options:</p> <ul style="list-style-type: none"> <li>• <b>Message Email</b> enables all related fields. <ul style="list-style-type: none"> <li>▪ <i>Email From Address</i> and <i>Email Subject</i> are required. <b>Note:</b> These must align with Communications web module setup.</li> <li>▪ <i>Prompt for Email Upon Submit</i> displays a dialog asking whether to email the receipt (or direct invoice) when the transaction is finalized/submitted. This defaults to checked (display the dialog).</li> <li>▪ <i>Allow Email on Demand</i> adds a button to the Finalize/Submit transaction page that lets you send an email with receipt/direct invoice, regardless of the state of the transaction. This defaults to checked.</li> <li>▪ <i>Only After Transaction Submitted</i> specifies the receipt can only be sent on submitting the transaction. There is no prompt, nor is there a button on the Finalize/Submit page prior to finalizing/submitting; however, the button will be available after the transaction is finalized/submitted. This defaults to unchecked.</li> </ul> </li> <li>• <b>Notification Message</b> – Enabling this option behaves the same as Message Email, except that <i>Email From Address</i> is disabled as <i>From</i> address does not apply to notifications.</li> </ul>
<b>Receipt/Invoice Configuration</b>	<p>This area is labeled <i>Receipt Configuration</i> when <i>Start As</i> on the <i>Main</i> tab = <b>Sale</b> or <b>Order</b>. In this case you can use this area to:</p> <ul style="list-style-type: none"> <li>• Select a template for receipt presentation. The drop down menu is populated with templates as configured in CostGuard Client.</li> <li>• Specify footer text for the Receipt.</li> <li>• Select a logo image to appear on the receipt.</li> </ul> <p>This area is labeled <i>Invoice Configuration</i> when <i>Start As</i> = <b>Direct Invoice</b>. In this case you can use this area to:</p> <ul style="list-style-type: none"> <li>• Select a template for invoice presentation. The drop down menu is populated with templates as configured in CostGuard Client.</li> <li>• Choose to include all order items on the invoice or only direct invoice items.</li> <li>• Specify text for the terms and conditions.</li> <li>• Select a logo image to appear on the invoice.</li> </ul> <p><b>Note:</b> When Direct Invoice fields are defined on the starting block, they are applied and take precedence over the equivalent settings for direct invoicing configured in the Orders web module in Manage &gt; Settings.</p>

## 2.3 EXAMPLE - COMPLETING A TENDERED TRANSACTION FROM START TO FINISH

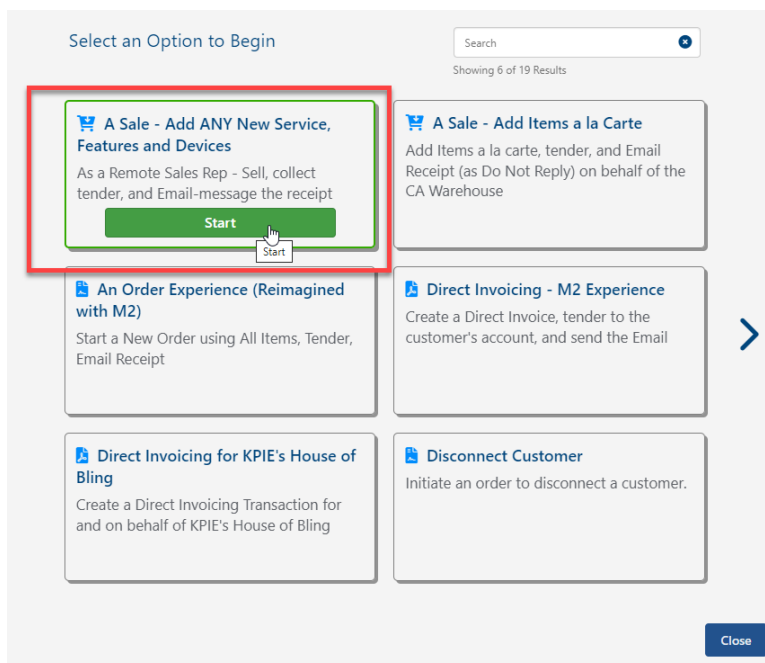
This example takes you through the steps for starting, assembling and finalizing a transaction that includes billing and retail items. It will demonstrate applying a discount, tax jurisdiction adjustment and a retail installment plan for the retail item. The resulting amount due will be tendered, and the generated receipt for the transaction will be emailed to the customer.

**Note:** This example will be initiated as a *sale* transaction which includes the Review Cart page for reviewing the transaction with the customer prior to finalizing. An order transaction would support all of this functionality as well, with the exception of the review page which is not presented in order transactions.

### 2.3.1 STARTING THE TRANSACTION AND SELECTING LOCATION/REGISTER

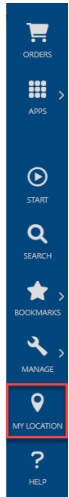
Based on *Displayed In* options as set on the starting block you can start a sale transaction from the Orders and/or Customer Care web module.

Use a starting block that you set up to support a retail location and register with receipt/email functionality. If you initiate the transaction from Customer Care, you'll be directed to Orders to complete the transaction.



For remote business operations (e.g., call centers) where the sales or service associates are not bound to or cognizant of a specific location and/or register, the location and register settings are set on the selected starting block. **Note:** When location and register are set on the starting block, those settings will take precedence over location/register settings as may be entered via *My Location* in the Orders Apps tray.

**Note:** For transactions where each sales associate is required to use their specific location and register, those associates must use the *My Location* option in the Orders App tray. You can ensure associates use *My Location* by checking **Is Register Required** on the starting block (and leaving location and register undefined so as not to override *My Location* settings).



The Location and Register menus in the *My Location* dialog are populated based on user's Location access configuration in the CostGuard Client POS Back Office.

**My Location**

Location  
California Warehouse

Register \*  
WH Reg 1

Save Cancel

When you set location and register via *My Location*, the icon in the Orders App tray is updated to reflect that status (circled icon).



**Note:** If a user is not authorized at a location, the following error is displayed:

**My Location**

No locations are authorized.

Location

Register

Save Cancel



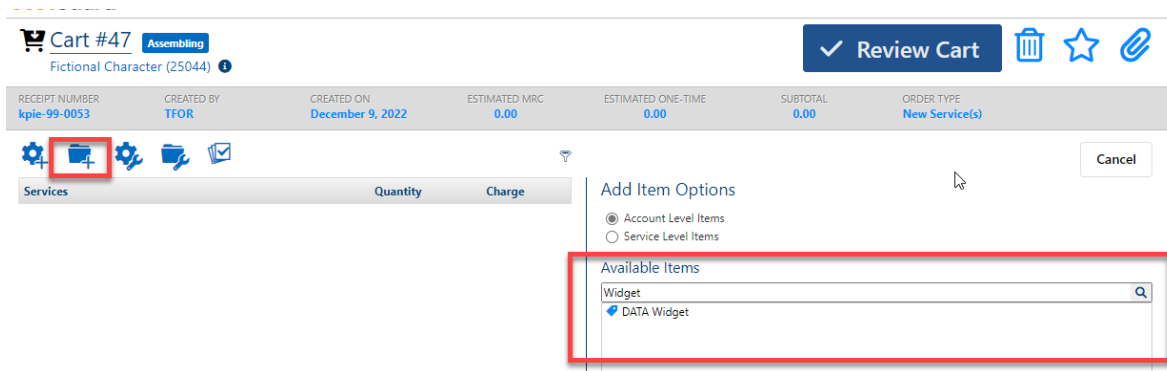
## 2.3.2 BASIC INFORMATION

Selecting a starting block displays the Basic Information page. As with any transaction, you need to specify the *Customer*. When initiated in Customer Care the customer and/or service are auto-populated. *Order Type* is also required and may be auto-populated based on the starting block configuration. Note: In the example below, this page is labeled *New Cart* as the selected starting block was set up to *start as a sale* (as opposed to an *order*). Labeling for subsequent pages, buttons and so on will reflect this as well.

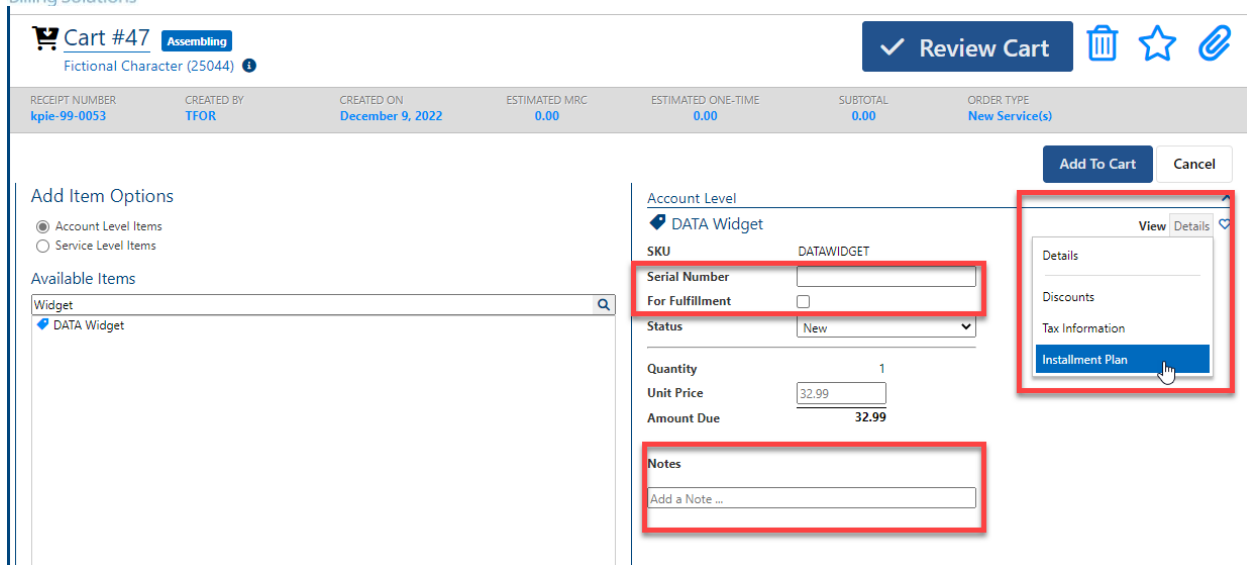


## 2.3.3 ASSEMBLY

Saving the basic information displays the Detail page for assembling the transaction. This is where you select one or more items for the transaction. **Note:** The available actions reflect the starting block configuration. In this case, the block is configured to permit adding and modifying products and services. Click the *Add Items* icon. Then choose to add account- and/or service-level items and use the search tool to find the items you need to add.

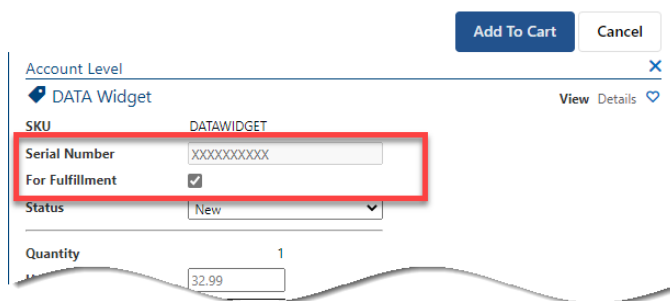


DATA Widget is a retail item. The staging area for a retail item is shown below.



There are several considerations when adding retail items:

- Retail items can be serialized or non-serialized. You'll need to enter serial numbers for serialized items before adding them to the transaction. If you don't enter a required serial number, the field is highlighted in yellow and you will not be allowed to proceed.
  - If you need to defer specifying the serial number you can click the *For Fulfillment* check box. This auto-populates the Serial Number field with a temporary serial number (XXXXXXXXXXXX). This lets you proceed with the transaction where a serial number is needed, and then use a separate workflow to pause the transaction. **Note:** You are responsible for setting up the workflow. IDI can provide assistance via a work order.




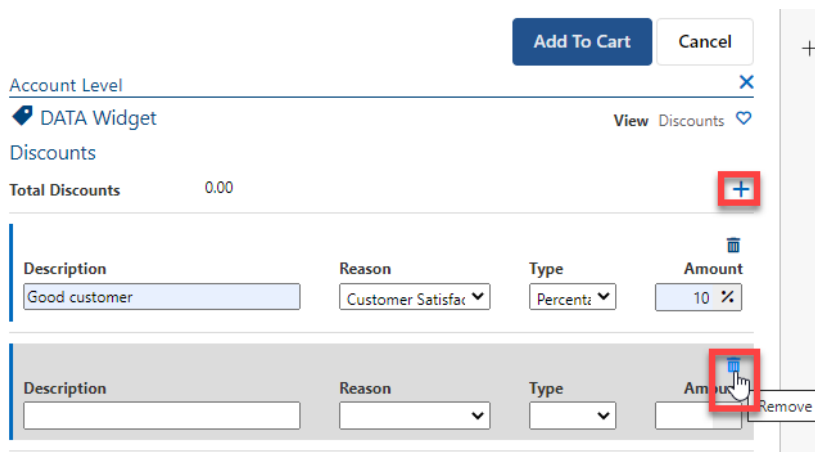
- The *View* menu has options related to retail items:
  - **Discounts** lets you apply one or more retail discounts to the retail item being added.
  - **Tax Information** lets you change tax jurisdiction for the item (initially set on Account Details > Tax Information).
  - **Installment Plan** is only available when the selected retail item requires or allows a retail installment plan. This view is for completing installment plan details.
- The *Notes* field lets you enter a note for the retail item on the transaction receipt. Clicking in the field expands it to 4000-character capacity. **Note:** When entering a note, be mindful of how much room it will occupy on the receipt. You may not want to use the full capacity.

Typically, you'll defer adding the item (by clicking the **Add To ...** button) if you know additional configuration is required to apply discounts, change tax jurisdiction or complete installment plan details. Do this by selecting the applicable option from the *View* drop-down menu and proceed as described below.

### Applying a Retail Discount on a Retail Item

Select **Discounts** from the *View* menu. This view lets you apply one or more discounts on-the-fly. To do this:

- Click **+** to display a row for entering the discount details.
  - Enter a Description.
  - Select a Reason.
  - Choose to apply the discount as a Fixed Amount or Percentage.
  - Then enter the corresponding amount/percentage value.
- Click the **+** icon to add another Discount.
- To remove an added Discount, click the  icon.



The screenshot shows the 'Discounts' section of the application. At the top, there are 'Add To Cart' and 'Cancel' buttons. Below them is a 'View' dropdown menu set to 'Discounts'. The 'Total Discounts' is shown as 0.00. A table with the following columns is displayed: Description, Reason, Type, and Amount. The first row contains 'Good customer', 'Customer Satisfac', 'Percent', and '10 %'. A red box highlights a '+' button to the right of the table. Below the table, there is a 'Remove' button with a trash icon, also highlighted by a red box.

**Note:** If a retail promotion has been configured for the retail item and the eligibility conditions are met, the system will apply the retail promotion-driven discount when reviewing the cart.

## Changing Tax Jurisdiction on a Retail Item

If you need to establish a tax jurisdiction other than the configured default for the customer, select **Tax Information** from the *View* menu. This view lets you select one of these options for establishing tax jurisdiction:

- **Default Taxing Method** – Uses the tax jurisdiction for the location performing the transaction.
- **Primary Customer Contact** – Uses the tax jurisdiction from the account's primary customer contact. Selecting this displays this contact's address information.
- **Service Address** – Uses the tax jurisdiction from the selected service address. Selecting this displays a menu for choosing an existing service address on the account.
- **Service Contact**– Uses the tax jurisdiction from the selected service contact. Selecting this displays a menu for choosing an existing service contact on the account. Or you can click the **+** icon to add another service contact (using Customer Care).

Add To Cart Cancel

---

Account Level
×

DATA Widget
View Tax Information

---

Tax Information

**Tax Using**

☐ Default Taxing Method  
☒ Primary Customer Contact  
☐ Service Address  
☐ Service Contact

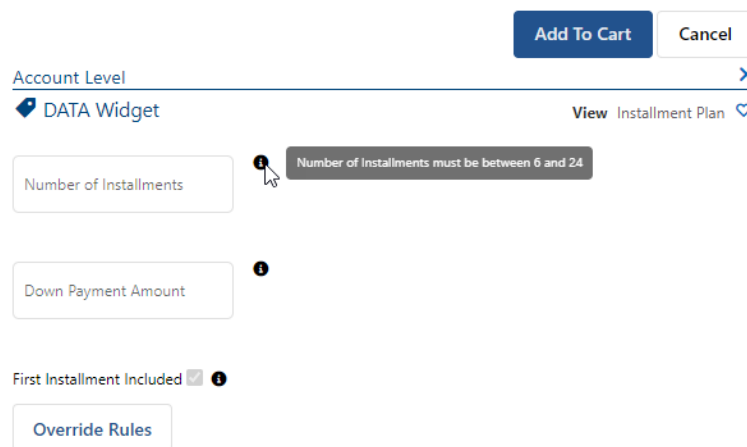
**Address Information**

Fictional Character  
 123 Illusion Road  
 Salem, MA 01970  
 USA

## Completing Retail Installment Plan Details

If the retail item requires (or allows) a retail installment plan, select **Installment Plan** from the **View** menu. The fields in this view follow the rules for the installment plan profile assigned to the retail item. Profiles are configured via **Product Management > Installment Plan Profiles** in CostGuard Client, and assigned to the retail item via the Add/Edit Retail Product form (Behavior tab) in the Product Catalog.

You can edit these fields as the profile allows/requires. In the example below, the profile requires you specify the *Number of Installments* and *Down Payment Amount*. *First Installment Required* is pre-selected and can only be changed by overriding this profile rule. You can see additional details for a field by hovering the mouse over the associated information (!) icon.



This screenshot shows the 'Retail Installment Plan Details' form. At the top right are 'Add To Cart' and 'Cancel' buttons. Below them is a header bar with 'Account Level' and a close icon. The main section is titled 'DATA Widget' and includes a 'View Installment Plan' link with a heart icon. The form contains three input fields: 'Number of Installments' (with a tooltip indicating a range of 6 to 24), 'Down Payment Amount', and 'First Installment Included' (which is pre-selected). An 'Override Rules' button is located at the bottom.

The view indicates when you make an entry that's not valid. In the example below you can see the current entry of **5** for number of installments is invalid as the allowable range is 6-24.



This screenshot shows the same form as above, but with an invalid entry. The 'Number of Installments' field now contains the value '5', which is highlighted with a red border and a red error message: 'Number of installments must be between 6 and 24'. The 'Down Payment Amount' field is now required, indicated by a red border and the text 'This field is required'. The 'First Installment Included' checkbox remains checked, and the 'Override Rules' button is still present.

If you need to override one or more rules, click **Override Rules** and then click again in the confirmation prompt.

### Override Installment Plan Rules

Please confirm you want to override the configured rules for this installment plan.

Override Rules

Close

In the example below, you can see the *First Installment Included* checkbox which was pre-selected and not editable can now be edited. You can also make entries in the other fields that exceed the ranges set by the profile rules.

Add To Cart Cancel

Account Level ×

DATA Widget

View Installment Plan ♥

Number of Installments ?

24

Down Payment Amount ?

5

First Installment Included ☐

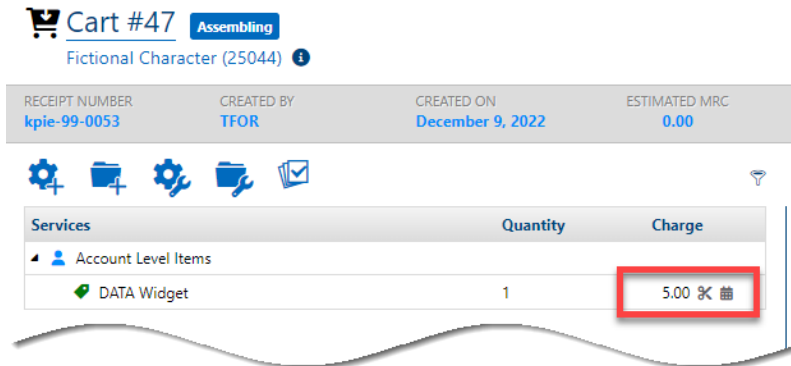
Override Rules

Rules overridden by tfor

**Note:** You can restrict the ability to override installment plan profile rules through Order Field Configuration as described later.

## Adding Items to the Transaction

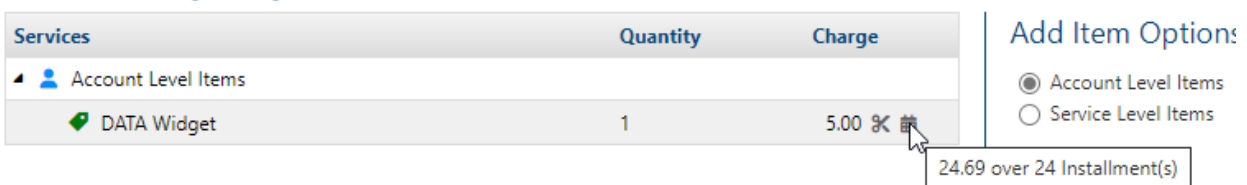
When you're ready, click the **Add To ...** button. This adds a row in the left pane showing pertinent information for charge, discounts and installment plan (as applicable).



Hovering the cursor over a particular indicator displays additional detail. For example, the scissors icon indicates one or more discounts have been applied. Hovering over the scissors displays discount details. In the example below, the \$32.99 charge for the product has been discounted by \$3.30. **Note:** If the item has multiple discounts, the information reflects the cumulative amount for all discounts.

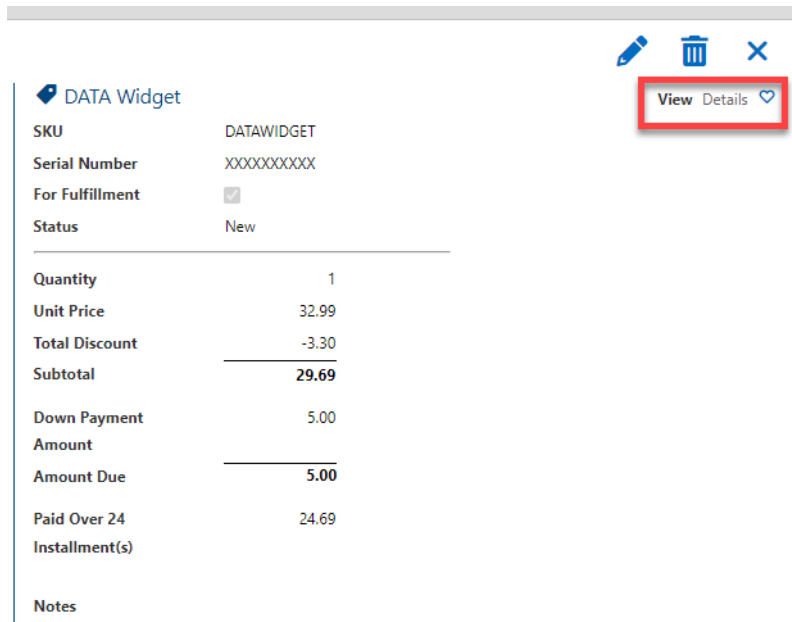


The calendar icon indicates the item has a retail installment plan. Hovering over the calendar displays installment plan details. The example below indicates \$24.69 is owed over 24 installments (first installment is not required on the sale).



The discount and installment plan result in a charge of \$5 owed for this item at the time of sale (not including taxes).

**Note:** You can review discount, tax jurisdiction and installment specifications for an item via the *Details* view.



**DATA Widget**

SKU: DATAWIDGET  
Serial Number: XXXXXXXXXX  
For Fulfillment: ☒  
Status: New

---

Quantity	1
Unit Price	32.99
Total Discount	-3.30
<b>Subtotal</b>	<b>29.69</b>

---

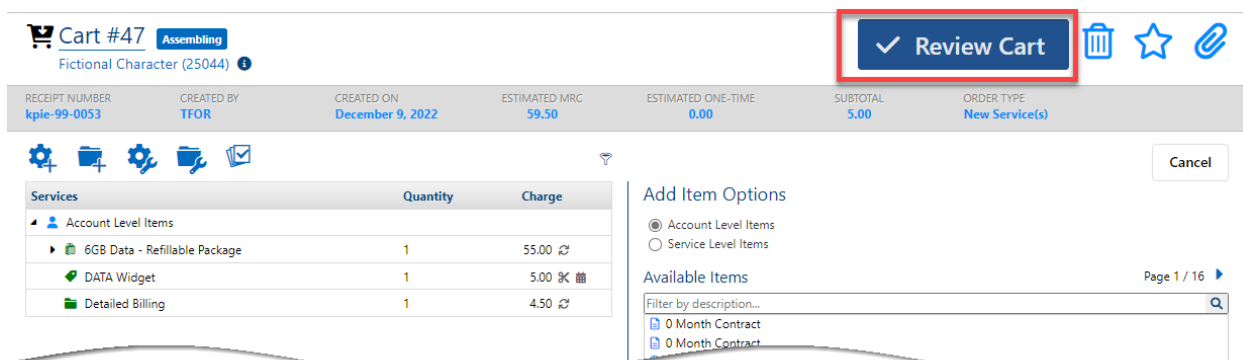
Down Payment Amount	5.00
<b>Amount Due</b>	<b>5.00</b>
Paid Over 24 Installment(s)	24.69

Notes

## 2.3.4 REVIEW AND TENDER

**Note:** Below, in addition to the DATA Widget retail item, two billing items have been added to the transaction.

When you're ready to move from *Assembling* to the *Review* phase, click the **Review ...** button.



**Cart #47** Assembling  
Fictional Character (25044)

RECEIPT NUMBER: kpie-99-0053 | CREATED BY: TFOR | CREATED ON: December 9, 2022 | ESTIMATED MRC: 59.50 | ESTIMATED ONE-TIME: 0.00 | SUBTOTAL: 5.00 | ORDER TYPE: New Service(s)

Services	Quantity	Charge
Account Level Items		
6GB Data - Refillable Package	1	55.00
DATA Widget	1	5.00
Detailed Billing	1	4.50

**Add Item Options**  
☒ Account Level Items  
☐ Service Level Items


**Available Items**  
 Filter by description...  
☐ 0 Month Contract  
☐ 0 Month Contract

Page 1 / 16







For sales transactions, this displays a page that lets sales associates review transaction details with the customer prior to moving to checkout. **Note:** For *order* transactions, this review page is not shown.

- The *Billing Summary* section provides the following information:
  - A simple summary of service- and account-level items. **Note:** There are no service-level items in the below example.
  - Separate sums for billing recurring and one-time (non-recurring) charges for the transaction items.
  - A simple summary of the total (sum of recurring and one-time charges) and the resulting increase or decrease on the next invoice; for example: *The next invoice will include an estimated amount of 59.50.*
- The *Cart Summary* section provides totals for the following:
  - Item (count) Subtotal – The sum of the extended price from all retail product line items. The label contains a count of the unique items (SKUs) involved.
  - Retail Discounts – The sum of the retail discounts applied.
  - Taxes – The sum of the calculated sales taxes to be paid by the consumer/subscriber.
  - Total Amount Due – This is the net of the above listed sums.


**Cart #47**
Assembling

Fictional Character (25044)

RECEIPT NUMBER	CREATED BY	CREATED ON	ESTIMATED MRC	ESTIMATED ONE-TIME	SUBTOTAL	ORDER TYPE
kpie-99-0053	TFOR	December 9, 2022	59.50	0.00	5.00	New Service(s)

**Services**

Description	Quantity	Unit Price	Total Price
<b>Account Level Items</b>			
DATA Widget	1	32.99	32.99
24.69 over 24 Installments for DATA Widget - XXXXXXXXXX	24		
Good customer	1	-3.30	-3.30
Detailed Billing	1	4.50	4.50
6GB Data - Refillable Package	1	55.00	55.00

**Billing Summary**

Adding 3 Features
 

**MRC** 59.50  
**One-Time** 0.00  
 The next invoice will include an estimated amount of  
**59.50**

**Cart Summary**

Items (1) 8.30  
 Discounts (1) -3.30  
 Tax 1.86  
**Total** 6.86  
[Proceed to Checkout](#)

Click **Proceed to Checkout** when you're ready to move on to the tendering step.

Tendering occurs on the page shown below. Note: The **Finalize Sale** button is labeled **Submit Order** for order transactions.

RECEIPT NUMBER	CREATED BY	CREATED ON	ESTIMATED MRC	ESTIMATED ONE-TIME	SUBTOTAL	ORDER TYPE
kp1e-99-0058	TFOR	December 21, 2022	0.00	0.00	5.00	New Service(s)

**Info**  
Order Type\*  
New Account Status  
Est. Complete Date  
Source Code  
Sales Associate  
Note

New Service(s)  
No Change  
  
  
200

**\$ TAX & TOTALS**
SUMMARY
WORKFLOW

Totals  
Subtotal  
MA Sales Tax - Non Local  
Total

5.00  
1.86  
6.86

+ NEW

**Note:** If you leave the Detail page in *assembly* phase without clicking the **Review Cart** button, and then return to the transaction via the Order OmniSearch, the tendering page will not be as described below. It will not show the **TAX & TOTALS** tab and will have a **Complete transaction** button (rather than **Finalize/Submit transaction**). In this case, you must click the **Complete** button to proceed to the presentation with **TAX & TOTALS**.

If you proceed to the tendering page directly from the Details view by clicking **Review Cart**, the page will have a **TAX & TOTALS** tab that shows a subtotal, tax, and total amounts stemming from all charges related to retail items on the transaction.

The **TAX & TOTALS** tab lets you:

- Add one or more tender types (**+NEW**).
- See a preview of the receipt (document icon).
- Email a receipt on demand (mail icon, if the starting block is configured to support this).

Finalize Sale

**\$ TAX & TOTALS**
SUMMARY
WORKFLOW

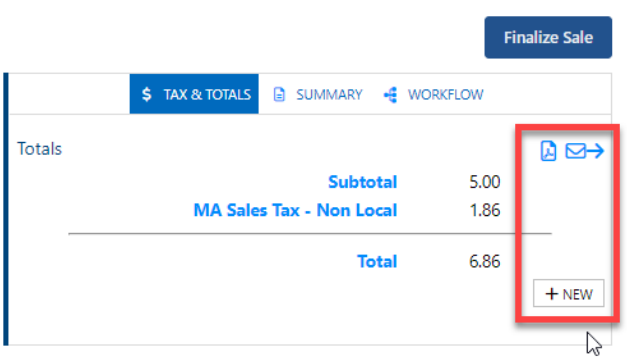
Totals  
Subtotal  
MA Sales Tax - Non Local  
Total

5.00  
1.86  
6.86

+ NEW

## Tendering

Add one or more tendering specifications. To start click **+NEW**. This displays fields for selecting the tender type and specifying the amount.

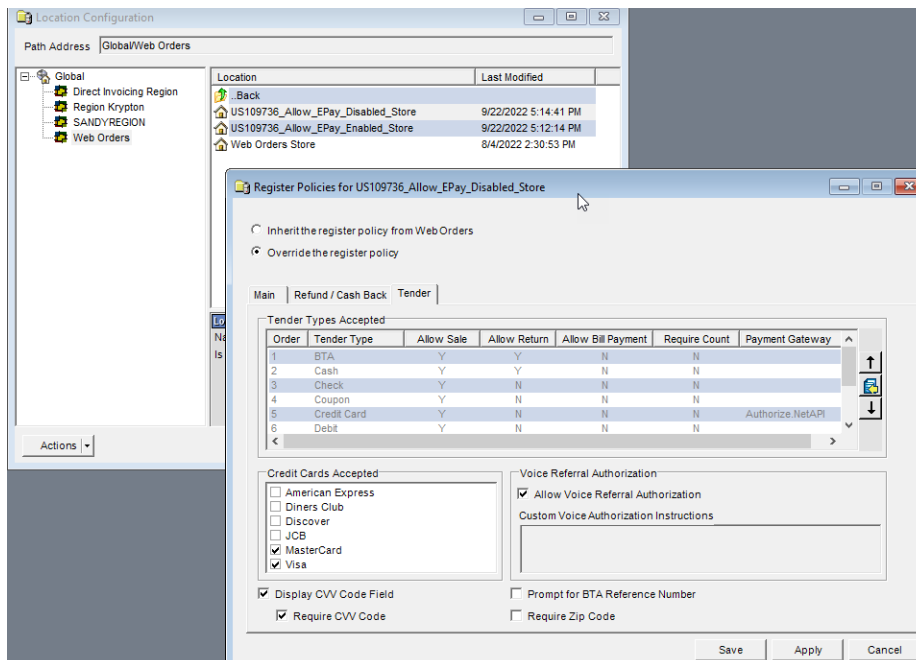


The screenshot shows the 'TAX & TOTALS' tab selected. The 'Totals' section displays the following values:

Item	Amount
Subtotal	5.00
MA Sales Tax - Non Local	1.86
<b>Total</b>	<b>6.86</b>

A red box highlights the '+ NEW' button and a document icon with an arrow, indicating where to click to add a new tendering specification.

The tendering options available in the *Types* drop-down menu are set by Location > Register Policy configuration in CostGuard Client POS Back Office. **Note:** Credit Card tender type must have payment gateway configured for Authorize.net. ACH tenders require a valid routing number.



The screenshot shows the 'Register Policies for US109736\_Allow\_EPay\_Disabled\_Store' dialog box. The 'Tender Types Accepted' table is as follows:

Order	Tender Type	Allow Sale	Allow Return	Allow Bill Payment	Require Count	Payment Gateway
1	BTA	Y	Y	N	N	
2	Cash	Y	Y	N	N	
3	Check	Y	N	N	N	
4	Coupon	Y	N	N	N	
5	Credit Card	Y	N	N	N	Authorize.NetAPI
6	Debit	Y	N	N	N	

Below the table, there are sections for 'Credit Cards Accepted' (with checkboxes for American Express, Diners Club, Discover, JCB, MasterCard, and Visa) and 'Voice Referral Authorization' (with checkboxes for Allow Voice Referral Authorization, Prompt for BTA Reference Number, and Require Zip Code). There are also checkboxes for 'Display CVV Code Field' and 'Require CVV Code'.

After you select a tender type, the fields for additional information depend on the selected type.

Type*	<input type="text" value="Credit Card"/>
Amount*	<input type="text" value="6.96"/>
Payment Method*	<input type="text"/>
<input type="button" value="Add"/> <input type="button" value="Cancel"/>	

#### Notes:

- When driver's license number is required its masked after entry; however, you can go back and edit the full number if needed.
- Tendering observes if the customer's account has been set to *Disallow Checks/ACH* and will not display those tender types for selection.
- The total amount for all added tenders must match the Total for the transaction.
- When you add a credit card or ACH (check or e-check) tendering type, the *Payment Method* drop-down menu will be populated with the customer's E-Pay accounts as configured in CostGuard Client if applicable. The **New Payment Method** option lets you enter credit card or check tendering details on-the-fly (not associated to a specific E-Pay account). This is the only option available when the customer does not have any E-Pay accounts configured. Selecting this option displays an I-Frame form for entering the credit card or ACH information as required.

Pay Amount 6.86

<input checked="" type="radio"/> <b>Credit Card</b>		<input type="radio"/> <b>Bank Account</b> (USA Only)	
<input type="text" value="Card Number *"/>		<input type="text" value="Exp. Date *"/>	<input type="text" value="Card Code *"/>
<b>Billing Address</b>			
<input type="text" value="First Name"/>		<input type="text" value="Last Name"/>	
<input type="text" value="Fictional"/>		<input type="text" value="Character"/>	
<input type="text" value="Billing Country"/>		<input type="text" value="Zip"/>	
<input type="text" value="USA"/>		<input type="text" value="01970"/>	
<input type="text" value="Street Address"/>		<input type="text" value="City"/>	
<input type="text" value="123 Illusion Road"/>		<input type="text" value="Salem"/>	
<input type="text" value="State"/>		<input type="text" value="Phone Number"/>	
<input type="text" value="MA"/>		<input type="text"/>	
<input type="button" value="Pay"/>		<input type="button" value="Cancel"/>	

## Previewing the Receipt

Click the document icon to preview the receipt.

[Finalize Sale](#)

\$ TAX & TOTALS
SUMMARY
WORKFLOW

Totals

<b>Subtotal</b>	5.00
<b>MA Sales Tax - Non Local</b>	1.86
<b>Total</b>	6.86

Type\* Credit Card

Amount\* 6.86

Payment Method\* New Payment Method...

Add
Cancel

Customer: 25044  
**Fictional Character**  
123 Illusion Road  
Salem, MA 01970

Holyoke, MA 01040

### Receipt

**Date** **SC/Assoc**  
Dec 10 2022 10:25AM EST 200

*Thanks for Shopping With Us!*

SKU	Description	Service Number	Quantity	Unit Price	Billed Amount	Ext. Price
DATAWIDGET	DATA Widget		1	32.99	0.00	32.99
	24.69 over 24 Installments for DATA WidgetXXXXXXXXXX				0.00	
103	Good customer		1	-3.30	0.00	-3.30
DETAIL	Detailed Billing		1	0.00	4.50	0.00
6GBPKG	6GB Data - Refillable Package		1	0.00	55.00	0.00
6GBREFDIS	Sell 6GB Data Refillable Discount		1	0.00	0.00	0.00
Est. Monthly Charges (before taxes)		59.50			Subtotal	5.00
First Bill Date		12/28/2022			Deposit	0.00
					MA Sales Tax - Non Local	1.86
					Total Due	6.86
					Install (DATAWIDGET)	24.69
					Total Tendered	

#### Installment Plans

Description	Sale Price	Collected at Sale	Unpaid Balance	Estimated Payment
DATA Widget XXXXXXXXXX	29.69	Down Payment: 5.00	24.69 over 24 payments	1.02

30 Day return policy on all equipment.

kpie-99-0053

## Emailing the Receipt

Your options for emailing receipts are driven by the starting block configuration.

- It may be set up to not email the receipt.
- It may be set up to prompt users whether or not to send when the transaction is finalized/submitted.

### Send Receipt in an Email?

**Subject:** Current details from your transaction that is being assembled

**From:** Support@support.ididem.com

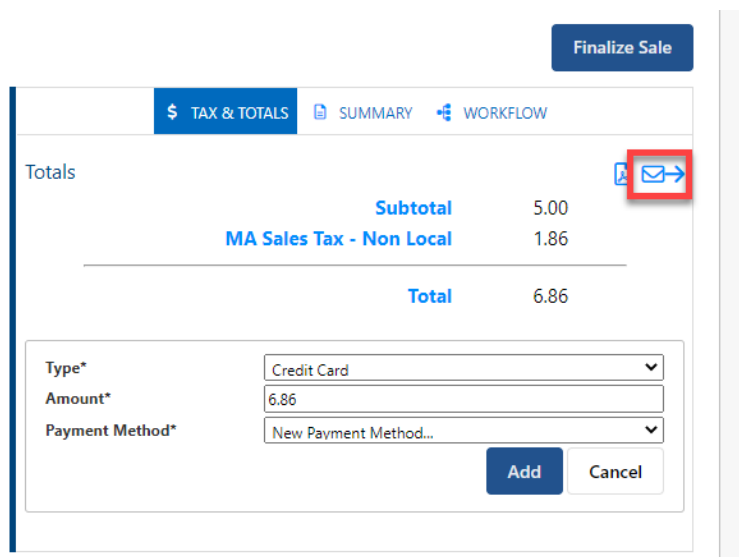
**Choose an Email Address**

- ☒ Primary Customer Contact: kpierce@idibilling.com
- ☐ Primary Billing Contact:
- ☐ Other

Send

Do Not Send

- It may be set up to allow sending the email on demand. In this case an email icon will be available next to the preview receipt icon. This displays the same prompt to choose whether or not to send.



**Finalize Sale**

**TAX & TOTALS** | SUMMARY | WORKFLOW

Totals

Subtotal	5.00
MA Sales Tax - Non Local	1.86
<b>Total</b>	<b>6.86</b>

Type\* Credit Card

Amount\* 6.86


Payment Method\* New Payment Method...

Add Cancel

- It may be set up to prompt to email when you move to finalize/submit the transaction, or after the transaction has been finalized/submitted, and you return to the transaction summary page via a transaction search. In these cases, the Email on Demand icon, as shown above, is not available on the TAX & TOTALS tab prior to finalizing/submitting; however, it will be available when viewing the transaction after it has been finalized.

## Finalizing/Submitting

When you're finished with tendering, previewing, and emailing options, click **Finalize Sale** (or **Submit Order**). This updates the left panel of the tendering page with pertinent transaction information. The two badges at the top indicate transaction status (**InProcess**) and the amount tendered. **Note:** For sales transactions, the *cart* transitions to a *sale*.


**Sale #13**
InProcess
6.86 Tendered

Fictional Character (25044)

RECEIPT NUMBER

kp1e-99-0053

CREATED BY

TFOR

CREATED ON

December 9, 2022

ESTIMATED MRC

59.50

ESTIMATED ONE-TIME

0.00

SUBTOTAL

5.00

ORDER TYPE

New Service(s)

Info

Order Type\*

New Service(s)

New Account Status

Est. Complete Date

Source Code

Sales Associate

200

Note

TAX & TOTALS

SUMMARY

WORKFLOW

Totals

Subtotal

5.00

MA Sales Tax - Non Local

1.86

Total

6.86

BTA

6.86

## 2.4 MANAGING TENDERED TRANSACTIONS

For retail web transactions you can search by order, cart or sale (depending on how you set up your starting blocks). For orders, there is a possibility the order has been tendered but not yet submitted. This condition will be indicated by an orange icon in the first (left) column. The icon will turn blue once the order has been submitted.

Order Search

Enter an Account Number, Customer Name, or Order ID

Created From: 10/01/2022 Created To: Transaction Type: Order Type: State:

Clear Options Search

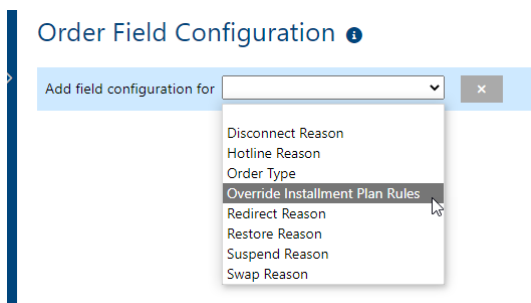
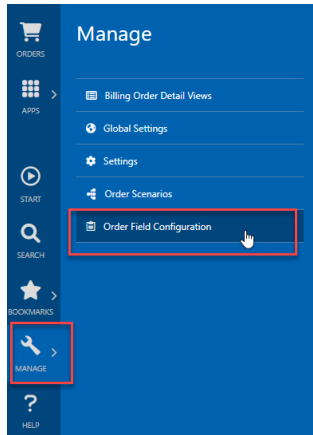
Order	Type	State	Customer Name	Account Number	Create Date	Last Modified By
6603	Standard Order	Assembling	US109037	31077	10/21/2022 5:53 PM	admin
6604	Standard Order	Assembling	US109037	31077	10/21/2022 5:52 PM	admin
6603	Standard Order	Assembling	FName7327503 M LName5112770	31200	10/21/2022 5:51 PM	admin
6602	Standard Order	Assembling	FName9308063 M LName8499504	31199	10/21/2022 5:50 PM	admin
6601	Standard Order	Assembling	US109037	31077	10/21/2022 5:49 PM	admin
6600	Standard Order	Assembling	FName2092419 M LName5383569	31198	10/21/2022 5:48 PM	idi_good
6599	Upgrade, Dow...	Assembling	FName5595852 M LName2574923	31197	10/21/2022 5:47 PM	admin
6598	Customer	Assembling	FName6500496 M LName9699305	31196	10/21/2022 5:46 PM	admin
6597		Assembling	FNBillable19746 M LBillable19746	31195	10/21/2022 5:42 PM	idi_good
6596		Assembling	FNBillable30925 M LBillable30925	31194	10/21/2022 5:42 PM	idi_good
6595	Customer	Assembling	FName3750870 M LName7608517	31193	10/21/2022 5:40 PM	idi_good
6594				31192	10/21/2022 5:39 PM	admin

**Note:** Tendered transactions CANNOT be deleted.



## 2.5 RESTRICTING OVERRIDE INSTALLMENT PLAN RULES

Order Field Configuration in the Orders web module lets you restrict overriding installment plan rules.



### Order Field Configuration

**Override Installment Plan Rules**

**+ Restrict** when

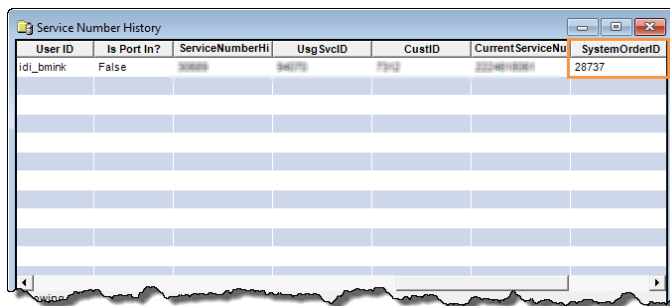
Starting Action In  AND

User Group In

### 3 Access to ID Associated to a Billing Order

The ID associated to a billing order (BillingOrderID in web APIs or *SystemOrderID* in CostGuard Client) can now be accessed from the Service Number History on an account. A new *SystemOrderID* column has been added to the *ServiceNumberHistory* table in the CostGuard core database. The value is an integer that can be NULL. **Note:** All entries *prior* to this release will be NULL. Following deployment of this release, if an order results in an update to the Service Number History this field will be filled in with the SystemOrderID for the that order. If the Service Number History is updated outside of an order, the value will be NULL.

In CostGuard Client you can view the *SystemOrderID* via the Service Number History when you choose to view *all columns*. To do this, right-click a service and choose **Properties > Service Number History**. Then, if the form isn't showing all rows by default, right click the bottom pane labeled **Showing X Rows** and choose **Columns > All**.



User ID	Is Port In?	ServiceNumberHi	UsgSvcID	CustID	CurrentServiceNu	SystemOrderID
idi_bmrk	False	30000	94079	7392	2024010000	28737

Additionally, the *ServiceNumberHistory* OData in the Customer Web Service was updated to include a *BillingOrderID* column for use in the web/APIs.



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[www.idibilling.com](http://www.idibilling.com)