

Core Release Bulletin

***CostGuard Solution
23.7 Release***

July 2023

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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 3515	Require Cancel Reason code for active protection plans on Customer Disconnect orders This lets you apply a cancel reason code for all active protection plans on an account when you submit a customer disconnect order. It saves you from having to individually cancel protection plans and specifying cancel reasons prior to disconnecting the customer.
Payment Processing	FR 3533	Enhancements for configuration page With CostGuard version 23.7 the Paymentus Configuration form in Customer Care is now presented on two drop-down menus. Subdomain and encryption secret configuration has been moved to the second menu. Complete information for setting up and using the Paymentus Solution is provided in the Paymentus Payment Vendor article in the IDI Knowledge Center.
Treatment	AR 9207	Workbook editor enhancements <ul style="list-style-type: none"> Service count by invoice category - A new workbook function (<i>ServiceCountByInvoiceCategory</i>) provides the treatment workbook with a service type count when provided a specified invoice category (<i>InvoiceCategoryID</i>) and service type (<i>SvcTypeID</i>). This new function uses a new workbook reference (<i>CatalogIDs</i>) sheet for lookup. Detect multiple services across an invoice category where collection actions (hotline/suspend/restore) are applicable. Ability to remove identified accounts from automated processing when multiple accounts (as described above) are detected. Manually take collection action based on manually selected services from the identified account.
E911 Management <ul style="list-style-type: none"> Orders Customer Care Workflow Admin Console 	FR 3463	Support for E911 in CostGuard Web Modules New functionality in the CostGuard Orders, Customer Care, and Workflow web modules helps Wireline providers manage E911 service information. In addition, new functionality in Admin Console Data Management supports multiple E911 companies.

Functional Area	AR/FR	Description
Customer Management – Invoice Display	FR 3489	Invoice Service Summary enhancements Total new charges and account charges have been added to the invoice service summary.
Address Validation - USPS	FR 3532	Annual update of USPS Address Validation DLLs. Note: Current DLLs will stop working as of 07/30/2023.
Tickets Customer Care Inventory Orders Payment Gateway Product Catalog Provisioning Bulk Data	N/A	Internal maintenance updates

1.2 Resolved Known Issues

The following known issues have been resolved in this release.

Functional Area	PR	Description
Orders	84387	Products and Packages report not accounting for prorate type ID 5 The Products and Packages report in the CostGuard Client Report Explorer was not accounting for the Prorate Type <i>In Advance - Forward Disconnect</i> (ProrateTypeID 5). These results were showing a value of <i>None</i> in the Prorate Type column. This report was updated to account for this Prorate Type.
Orders	84405	Web orders, credit card type on network receipt does not match credit card type entered in the Authorize.Net iFrame When you add a credit card tender in the Authorize.Net iFrame for entering credit card information, the network receipt shows the wrong credit card type (for example, you enter <i>Visa</i> , but the receipt shows as <i>Diners Club</i>). The correct payment information is now on the network receipt.
Payment Processing	84352	Recurring ePayment timeout issues Batch processing was causing E-Pay recurring payments to time out. A new stored procedure for creating recurring transactions processes all invoices/transactions at once instead previously it was done in batches.

Functional Area	PR	Description
Payment Processing	84383	<p>Deposit Interest Compounding job performance</p> <p>The Deposit Interest Compounding job would not complete due to performance with the number of accounts being processed where there was no change in account balance.</p> <p>The job has been optimized for better performance allowing the job to finish processing.</p>
Paymentus	84414	<p>Billing name error when using company name (no first/last name)</p> <p>When we attempt to connect to the Paymentus Agent Dashboard via SSO in Customer Care using a company name, there was an error indicating that a customer's first name and last name is required.</p> <p>This has been fixed by parsing the company name to fill in the first and last name as required by Paymentus.</p>


2 Require Cancel Reason Code for Active Protection Plans on Customer Disconnect Orders

The CostGuard system introduced enhanced support for configuring, selling and managing handset protection plans in version 21.7. This latest enhancement facilitates applying a cancel reason code for all active protection plans on an account when you submit a customer disconnect order. It saves you from having to individually cancel protection plans and specifying cancel reasons prior to disconnecting the customer.

When you begin a customer disconnect order (by clicking the *Disconnect Customer* check box), if the account has one or more active protection plans, the *New Transaction* page provides an additional field for selecting the protection plan cancel reason code. This is a required field, so you will not be allowed to proceed with (save) the order until this step has been completed.

The selected code will apply to *all* active protection plans on the account. **Note:** You can override the value on an individual protection plan by manually adding the protection plan SKU to the order and selecting a different cancel code value.

From this point, the order will proceed like any other order, and you can apply other actions as may be needed during order assembly. The cancel reason will be displayed along with other disconnect information on the review transaction page.

 New Order [Save](#) [Cancel](#)

Basic Information	Customer* <input type="text" value="Destiny"/> Use Enhanced Search Order Type* <input type="text" value="Disconnect Order"/> Sales Associate <input type="text" value="Sales Associate"/> Disconnect Customer <input checked="" type="checkbox"/>
Disconnect Information	Disconnect Date* <input type="text" value="06/04/2023"/> Disconnect Reason* <input type="text" value="Contract Up Will Not Renew"/> Disconnect Reason Details <input type="text"/>
Protection Plan Information	Cancel Reason Code* <input type="text" value="Customer Remorse"/>

3 Paymentus Enhancements

3.1 Enhanced Presentation for Paymentus Configuration

The Paymentus Configuration form in Customer Care is now presented on two drop-down menus. Subdomain and encryption secret configuration has been moved to the second menu.

- Initial View:

Paymentus
Integrate with Paymentus for processing payments through IDI web applications.

Configuration

My Configuration	These values are defined by you.	▼
Static Configuration	These values are defined by Paymentus.	▼

Save Cancel

[Turn Off Paymentus](#)

- My Configuration menu:

Paymentus
Integrate with Paymentus for processing payments through IDI web applications.

Configuration

My Configuration	These values are defined by you.	^
<div> <div>User Group</div> <div> <input type="text" value="CSRI"/> </div> </div> <div> The default user group that will be used within the Agent Dashboard when using single sign on. </div>		
Static Configuration	These values are defined by Paymentus.	▼

Save Cancel

[Turn Off Paymentus](#)

- Static Configuration menu:

Paymentus
Integrate with Paymentus for processing payments through IDI web applications.

Configuration

My Configuration These values are defined by you. ▾

Static Configuration These values are defined by Paymentus. ▲

Subdomain	TLA
secure1	IDI3

SSO Encryption Secrets

Agent Dashboard	Customer Portal
7C1 [REDACTED] F0E6	7C [REDACTED] F0E6
XOTP Key ID *	XOTP Secret *
001	F29 [REDACTED] D3F838

Save Cancel

[Turn Off Paymentus](#)

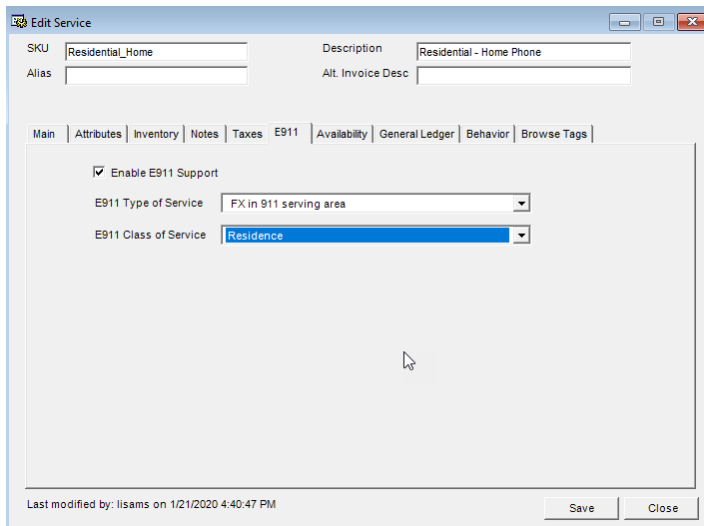
4 E911 Support in Web Modules

New functionality in the CostGuard Orders, Customer Care, and Workflow web modules helps Wireline providers manage E911 service information. This includes:

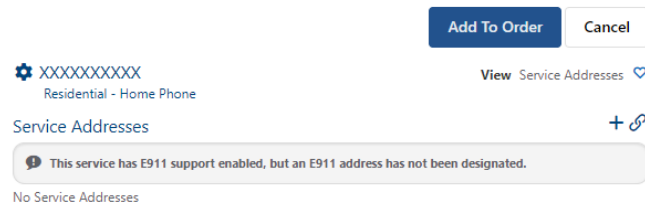
- **In Orders** – the ability to designate a service address as the E911 address on eligible service types for add and modify service orders. New functionality in Workflow supports auto-creating E911 file records for export to E911 providers when E911 information is changed in the CostGuard system.
- **In Customer Care** – the ability to view and manage E911 information on an account. New functionality in Workflow supports auto-creation of E911 file records when an E911 address is set, changed, or removed. Customer Care also supports manually creating an E911 file record as may be needed for correcting errors and other non-standard cases.
- **In Admin Console Data Management** – support for multiple E911 companies. Typically, just one company is required per CostGuard environment; however, multiple E911 companies may be needed to support mergers, acquisitions, and such.

4.1 E911 Support in Orders

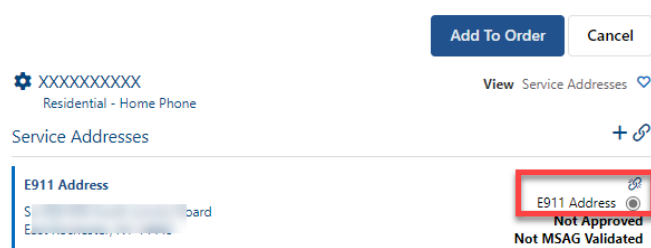
Note: This functionality is only available on service types configured to support E911 in CostGuard Client Product Catalog.



For properly configured service types, when you add a service of that type in the Orders web module, you can designate a service address on the service as the E911 address. When you select the **Service Addresses** view, you'll see a message that an E911 address has not yet been designated.



To designate an address, click the **+** button. This displays a list of available addresses. To designate one as E911 click the **E911 Address** radio button.



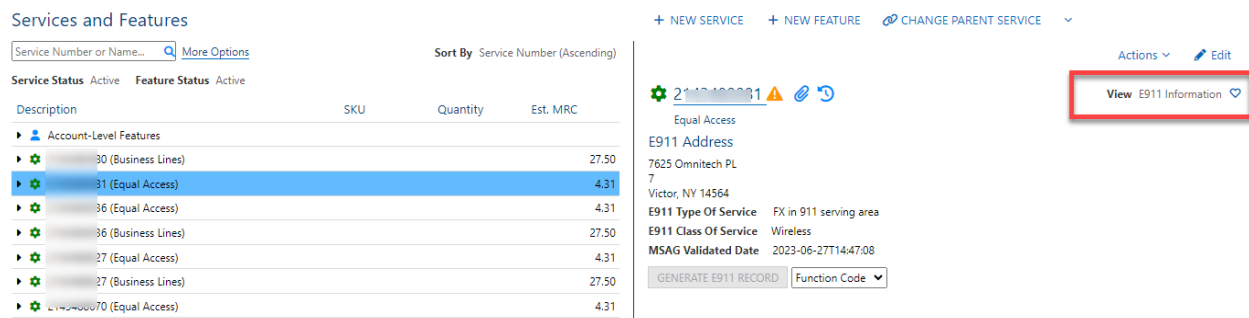
4.1.1 AUTO-CREATE E911 FILE RECORDS E911-RELATED ORDERS

This is supported by new functionality in Workflow. See *Support for Creating E911 Batch Records*.

4.2 Viewing and Managing E911 Information in Customer Care

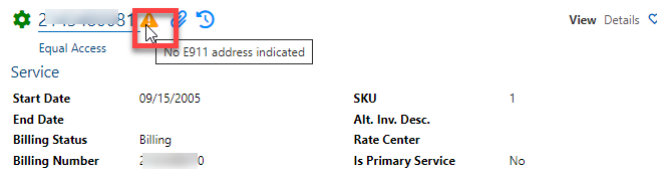
4.2.1 SERVICES AND FEATURES PAGE

You can view and manage E911 information from the Services & Features page. To do this, select the service in the left pane then select **E911 Information** from the *View* drop-down menu in the right pane. **Note:** View access requires *Allow Log On* permission in Customer Care. Managing E911 information requires *Manage Customer* permission.



The screenshot shows the 'Services and Features' page. On the left, a table lists services with columns for Description, SKU, Quantity, and Est. MRC. Service 31 (Equal Access) is selected. On the right, the 'E911 Information' view is displayed, showing details like E911 Address (7625 Omnitech PL, Victor, NY 14564), E911 Type Of Service (FX in 911 serving area), and E911 Class Of Service (Wireless). A red box highlights the 'View E911 Information' link in the top right corner.

When an active E911 service does not have an E911 address assigned, this condition is indicated by an orange triangle next to the service number.

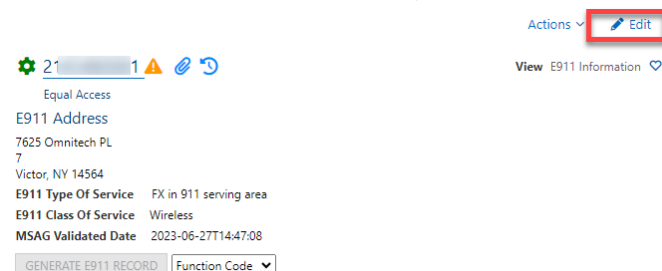


The screenshot shows a service with an orange triangle next to its number, indicating 'No E911 address indicated'. A red box highlights the orange triangle. The service details on the right show the service is active and has a billing status of 'Billing'.

The Services & Features page also lets you manage E911 information on the service. This includes:

- Adding an E911 address when one does not exist. **Note:** The address is not required to be MSAG validated to be an E911 address.
- Removing an address
- Editing the E911 address, type of service and class of service.

To manage E911 information on a service, with the service selected in the left pane and the E911 Information view selected, click the **Edit** button in the right pane.



The screenshot shows the 'E911 Information' view for a service. A red box highlights the 'Edit' button in the top right corner. The service details on the right show the service is active and has a billing status of 'Billing'.

This displays the Edit dialog. Use the applicable drop-down menus to add/remove/edit information as needed.

+ NEW SERVICE + NEW FEATURE CHANGE PARENT SERVICE

Save Cancel

2 1

Equal Access

E911 Address 7625 Omnitech PL BLDG 7 Victor N

E911 Type Of Service FX in 911 serving area

E911 Class Of Service Wireless

MSAG Validated Date 2023-06-27T14:47:08

Notes:

- The E911 address is automatically set when a user links a service address to an E911 service if the E911 address is not already set for the service.
- You are not permitted to unlink a service address if it is designated as an E911 address.

4.2.2 AUTO-CREATE E911 FILE RECORDS FOR CHANGES DONE IN CARE

This is supported by new functionality in Workflow. See *Support for Creating E911 Batch Records*.

4.2.3 MANUALLY CREATING AN E911 RECORD

You can manually generate an E911 record when needed, for example, to correct an error. This function is only available when the E911 address is set and the E911 Class of Service and Type of Service fields are also populated. In this case an additional drop-down menu is available for selecting one of five function codes: Change (C), Delete (D), Insert (I), Unlock (U), and Migrate (M).

Actions Edit

2 1

Equal Access

E911 Address
7625 Omnitech PL
Victor, NY 14564

E911 Type Of Service FX in 911 serving area

E911 Class Of Service Wireless

MSAG Validated Date 2023-06-27T14:47:08

View E911 Information

GENERATE E911 RECORD

Insert

Function Code

Change

Delete

Insert

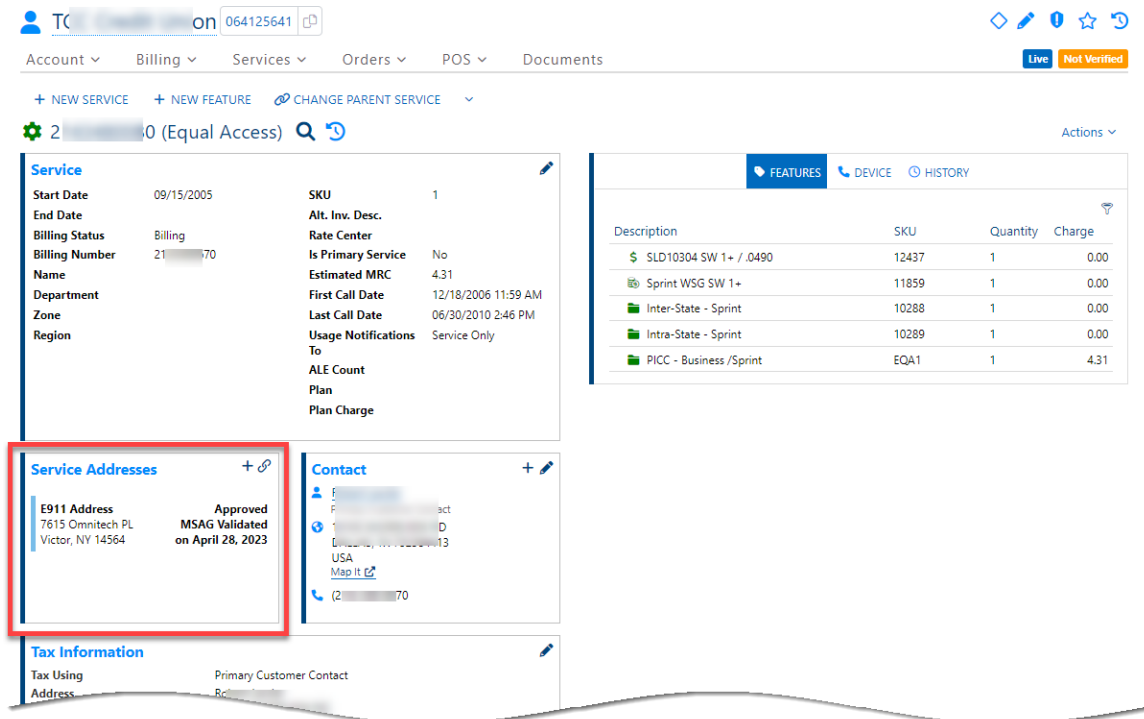
Unlock

Migrate

Once a code is selected, click **GENERATE E911 RECORD**.

4.2.4 SERVICE DETAILS PAGE

You can also view E911 information via the Service Detail Page (click service address in the right pane). This view does not support managing E911 information.



Service

Start Date	09/15/2005	SKU	1
End Date		Alt. Inv. Desc.	
Billing Status	Billing	Rate Center	
Billing Number	21-70	Is Primary Service	No
Name		Estimated MRC	4.31
Department		First Call Date	12/18/2006 11:59 AM
Zone		Last Call Date	06/30/2010 2:46 PM
Region		Usage Notifications To	Service Only
		ALE Count	
		Plan	
		Plan Charge	

Service Addresses

E911 Address
7615 Omnitech PL
Victor, NY 14564

Approved MSAG Validated on April 28, 2023

Contact

Primary Customer Contact
7615 Omnitech PL
Victor, NY 14564
USA
Map It

Tax Information

Tax Using Primary Customer Contact
Address

FEATURES

Description	SKU	Quantity	Charge
SLD10304 SW 1+ / .0490	12437	1	0.00
Sprint WSG SW 1+	11859	1	0.00
Inter-State - Sprint	10288	1	0.00
Intra-State - Sprint	10289	1	0.00
PICC - Business /Sprint	EQA1	1	4.31

4.3 Support for Creating E911 Batch Records

Workflow provides a new *Create Batch Detail* action to auto-create create E911 file records when E911 information is modified via Orders or Customer Care. This action is paired with four system-defined triggers – Contact Modified, Customer Modified, E911 Service Modified, and Service Address Modified. **Note:** E911 Service Modified is a new trigger added with the 23.7 release. The other triggers have been available prior to this release.

You can use the trigger search to find these triggers by selecting **Create E911 Batch Detail** as the **Action** criterion and **System-Defined** as the Type.

Triggers

Triggers search results:

Name: Trigger: From Last Modified:

Enabled: Action: To Last Modified:

Last modified by: Type:

[Create Trigger](#) [View History](#)

Name	Trigger	Action	Last Modified
[E911 Processing] Create E911 batch records By Contact	Contact Modified	Create E911 Batch Detail	07/11/2023 8:31 AM
[E911 Processing] Create E911 batch records By Customer	Customer Modified	Create E911 Batch Detail	07/11/2023 8:31 AM
[E911 Processing] Create E911 batch records By Service	E911 Service Modified	Create E911 Batch Detail	07/11/2023 8:31 AM
[E911 Processing] Create E911 batch records By Service ...	Service Address Modified	Create E911 Batch Detail	07/11/2023 8:31 AM

Clicking on a trigger in the search results displays the trigger-action pair. E911 Service Modified is shown below.

Configure Trigger [EDIT](#) System-Defined

Name* [E911 Processing] Create E911 batch records By Service

Description Create E911 batch records for services associated to an Service.

Enabled ☐

E911 Service Modified

GROUP CONDITION

Filters

Any

of the following:

E911ClassOfServiceID <> @E911ClassOfServiceID_Old

E911TypeOfServiceID <> @E911TypeOfServiceID_Old

E911ServiceAddressID <> @E911ServiceAddressID_Old

[DELETE](#)

Create E911 Batch Detail

Parameters

Contact ID

Customer ID

Order ID

Service Information Item ID

Service Address ID

Service ID

[CHANGE](#)

[SAVE](#) [CANCEL](#)

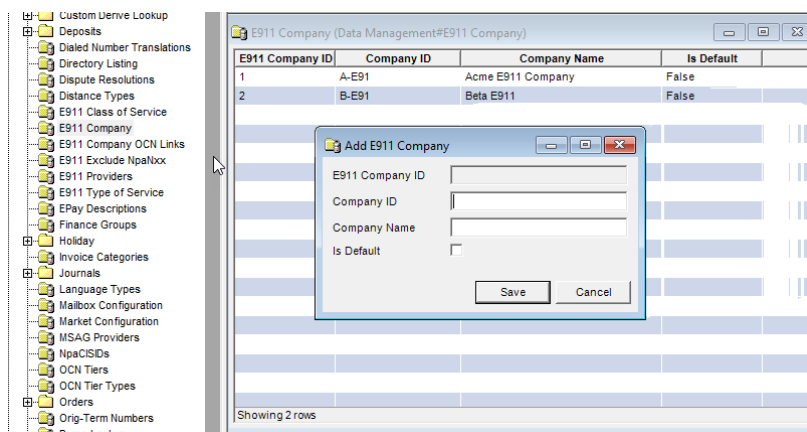
Note: These triggers are ready for use out-of-the box and do not require any further configuration. The applicable function code is applied based on the nature of the change:

- **C:** change
- **D:** delete
- **I:** insert
- **U:** unlock (delete for ported number)
- **M:** migrate (insert for ported number)

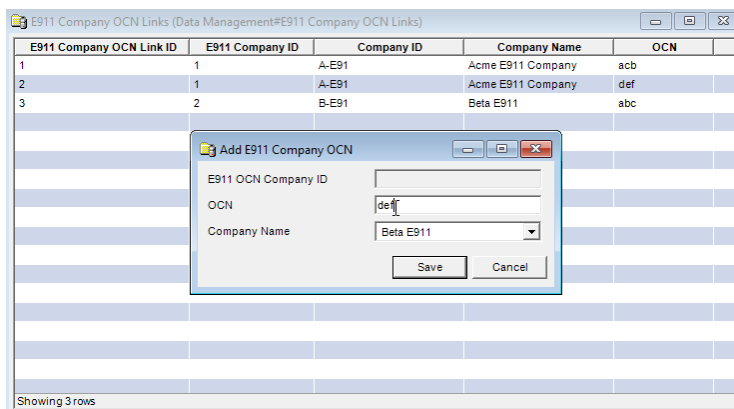
4.4 Support for Multiple E911 Companies

Typically, just one company is required per CostGuard environment; however, multiple E911 companies may be needed to support mergers, acquisitions, and such. This is supported by assigning multiple OCN company links to one or more E911 companies in Admin Console Data Management. **Note:** The E911 Company configuration that occurred in Admin Console > Business Rules (by IDI on customer's behalf) is no longer applicable.

First create one or more E911 companies as needed. In Admin Console > Data Management navigate to *E911 Company*. Enter the company name (your company name) and ID (as supplied to you by NENA - National Emergency Number Association). You may also set a company as the default.



With one or more E911 companies defined, navigate to Admin Console > Data Management > *E911 Company OCN Links*. This dialog lets you assign OCN multiple links to a selected company (one OCN at a time).



5 Invoice Service Summary Enhancements

Total New Charges and Account Charges have been added to the invoice service summary. In addition, whether all tax amounts or just per line tax amounts are included in Account Charges is based on environment configuration.

5.1 Total New Charges and Account Charges Fields

The new fields are displayed above Total Service Level Charges.

Service Summary

Invoice 5153838 (June 1, 2023)

June 1, 2023	
Service Number...	<input type="text"/>
Total New Charges	1,459.60
Account Charges	188.62
Total Service Level Charges	1,270.98
207 98 (One Intelligent Network MNGD SIP Service - ...	49.99
212 0 (One Intelligent Network MNGD SIP Service - DL...	0.35
212 3 (One Intelligent Network MNGD SIP Service - DL...	0.35
212 3 (One Intelligent Network MNGD SIP Service - DL...	0.35
212 3 (One Intelligent Network MNGD SIP Service - DL...	0.35
286 ing As A Service)	425.00
347 3 (Wireless Broadband)	286.49
426 SIP)	190.55
646 0 (One Intelligent Network MNGD SIP Service - DL...	0.35
646 1 (One Intelligent Network MNGD SIP Service - DL...	0.35
646 2 (One Intelligent Network MNGD SIP Service - DL...	0.35
646 3 (One Intelligent Network MNGD SIP Service - DL...	0.35
646 4 (One Intelligent Network MNGD SIP Service - DL...	0.35
646 3 (One Intelligent Network MNGD SIP Service - DL...	0.35
646 3 (One Intelligent Network MNGD SIP Service - DL...	0.35

Clicking the *Account Charges* link on the left displays a breakdown of those charges on the right.

Service Summary

Invoice 5153838 (June 1, 2023)

June 1, 2023	
Service Number...	<input type="text"/>
Total New Charges	1,459.60
Account Charges	188.62
Total Service Level Charges	1,270.98
207 98 (One Intelligent Network MNGD SIP Service - ...	49.99
212 0 (One Intelligent Network MNGD SIP Service - DL...	0.35
212 3 (One Intelligent Network MNGD SIP Service - DL...	0.35
212 3 (One Intelligent Network MNGD SIP Service - DL...	0.35
212 3 (One Intelligent Network MNGD SIP Service - DL...	0.35
286 ing As A Service)	425.00
347 3 (Wireless Broadband)	286.49
426 SIP)	190.55
646 0 (One Intelligent Network MNGD SIP Service - DL...	0.35
646 1 (One Intelligent Network MNGD SIP Service - DL...	0.35
646 2 (One Intelligent Network MNGD SIP Service - DL...	0.35
646 3 (One Intelligent Network MNGD SIP Service - DL...	0.35

Account Charges: 188.62

Description	Amount
Recurring Charges	5.00
Non-Recurring Charges	0.00
Taxes	162.25
Discounts	0.00
Installment Plans	0.00
Penalties	0.00
Corporate Charges	0.00
Finance Charges	21.37

5.2 Tax Amounts on the Invoice Service Summary

Tax amounts in this invoice view are accounted for at the service or account level dependent on how the environment is set up for tax rounding.

- If tax amounts are not rounded at the individual service level, then all taxes are accounted for as Account Charges in this view.
- If tax amounts are rounded at the individual service level, then taxes that are applicable to specific charges on a service are included in the total for each individual service.

In either case, per line taxes are always included in the Account Charges amount. These are based on the number of services on the account, and not the specific charges on the service.

To see how taxes are accounted for on this page, click the blue information icon (!) next to *Total Service Level Charges*. One of the following will be displayed:

- All tax amounts are included in the account charges section
- Per line tax amounts are included in the account charges section

All tax amounts included example:

Service Summary

Invoice 5153838 (June 1, 2023)

June 1, 2023

Service Number...

Please select an

Total New Charges	1,459.60
Account Charges	188.62
Total Service Level Charges	1,270.98
98 (One Intelligent Network MNGD SIP Service - DL...	42.55
0 (One Intelligent Network MNGD SIP Service - DL...	0.35
0 (One Intelligent Network MNGD SIP Service - DL...	0.35

All tax amounts are included in the account charges section

Per line tax amounts included example:

Service Summary

Invoice 9801394 (June 16, 2023)

June 16, 2023

Service Number...

Please select i

Total New Charges	91.41
Account Charges	5.91
Total Service Level Charges	85.50
14 (Wireless Service)	84.53

Per line tax amounts are included in the account charges section