

# Core Release Bulletin

***CostGuard Solution  
23.8 Release***

August 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
Payment Processing - Paymentus	FR 3533	<b>Assessing surcharges through Paymentus integration</b> This feature lets you set up Paymentus integration to handle surcharges (fees) on bill and installment payments according to your specific requirements for different customer groups. For example you can assess surcharges on payments by one group, and not assess surcharges on payments by another group. Controls to set this up are available on a new <i>Payment Type Groups</i> tab on the Paymentus Configuration form in Customer Care. Complete information on setting up and using Paymentus integration is provided in the Paymentus Payment Vendor article in the IDI Knowledge Center.
E911 Management	FR 3463	<b>E911 and MSAG validation enhancements</b> The following enhancements have been added to this functionality originally released in CostGuard 23.7: <ul style="list-style-type: none"> <li>In Customer Care OmniSearch, the service address search has a new field to filter search results on MSAG validation status: <i>Valid</i> or <i>Not Valid</i>.</li> <li>A confirmation message is displayed on manually adding an E911 record in Customer Care.</li> <li>The icon displayed when an E911 service lacks an E911 address has been changed from a warning to a caution.</li> </ul>
Tax Mananement	FR 3491	<b>New Options for Flat Fee Taxes</b> New options fort flat fee taxes are available when adding/editing a tax in CostGuard Client Tax Management. This enhancement can be used to support the Colorado Retail Delivery Fee (CORDF).
Billing - E-Rate	FR 3536	<b>Support for Grid Export in E-Rate</b> In Product Catalog <b>MANAGE &gt; E-Rate</b> , grid views that list FRNs (E-Rate Funding, E-Rate Utilization, and search results) let you export results to a .csv file using the <b>Export</b> button (similar to other grids in the CostGuard system).

Functional Area	AR/FR	Description
Address Validation – CoreLogic	AR 9223	<b>Support for address validation at the township level</b> For carriers that use CoreLogic Address validation, new functionality in CostGuard Client > BackOffice Management lets you enable/disable address validation at the township level. <b>Note:</b> This setting is disabled by default. Enabling this setting will incur additional charges.
Logging Configuration	N/A	Internal maintenance updates

## 1.2 Resolved Known Issues

The following known issues have been resolved in this release.

Functional Area	PR	Description
Customer Care	84382	<b>Start date off by one day</b> The start date in the Directory Listing view was off by one day. Changes were made so that it now displays the correct date.
Orders	84399	<b>Assignment template validation error on staged packages</b> When staging packages on a web order, assignment template validation would incorrectly count the package and its contents as separate items toward the maximum allowable quantity. For example, when the Assignment Template Rule specified <i>Maximum Required</i> = <b>1</b> , validation was counting the children within the package as additional items and indicating more than 1 item was selected. This validation has been corrected to only count the package and not its children.
Equipment Inventory	84413	<b>Warranty drop-down only returns first 100 rows</b> When adding a warranty to equipment inventory in the web, the Warranty drop-down only returned the first 100 results; however, some customers require more than 100 items be returned. The web service that makes this call has been updated to return all warranty results in the drop-down.
E911 Management	84432	<b>Paymentus static configuration parameters not editable</b> On the Paymentus Configuration form in Customer Care the parameters in the Static Configuration drop-down menu on the Configuration tab were read-only and not editable. These values are now editable.

Functional Area	PR	Description
E911 Management	84430	<p><b>E911 enabled setting ignored</b></p> <p>E911 must be enabled for users that require this functionality. This setting is disabled by default. The setting is not available to CostGuard users and must be enabled by IDI as needed. These E911 functions related to generating E911 records were ignoring the setting when it was toggled off.</p> <ul style="list-style-type: none"> <li>• Create E911 Batch Detail trigger action would fire when the setting was disabled</li> <li>• The Generate E911 record button was not hidden on the Customer Care Service and Features page was not hidden</li> </ul> <p>These issues have been fixed.</p> <p>This PR also addressed the following:</p> <ul style="list-style-type: none"> <li>• Updated the Create E911 Batch Detail action to better handle ported numbers</li> <li>• Updated the MSAG Validated date formatting on the Service and Features E911 Information page</li> </ul>
Bulk Import - Adjustments	84360	<p><b>Adjustment Created trigger not firing in adjustment bulk import</b></p> <p>The Bulk Adjustments import process was not firing the Adjustment Created workflow trigger when it was creating new adjustments, preventing the workflow from running.</p> <p>This process was updated to fire the Adjustment created trigger.</p>
E-Pay	84436	<p><b>E-Pay transactions issue when min/max charge values null</b></p> <p>PR 84352 (released in CostGuard version 23.7) introduced an issue generating the epay transactions when both MinCharge and MaxCharge fields on the Manage Epay Recurring Transaction form were empty. E-Pay transactions can now be completed when the Min and Max charges are not being used or set.</p>
E-Pay	84339	<p><b>E-Pay transaction timeout</b></p> <p>The timeout for the create recurring Epay transaction process has been increased to five minutes to prevent timeouts.</p>

## 2 Paymentus Integration - Support for Surcharges

This feature lets you set up Paymentus integration to handle surcharges (fees) on bill and installment payments according to your specific requirements for different customer groups. Customer groups are established through finance group configuration in Admin Console > Data Management. Customers are assigned to a finance group on adding or editing a customer account. The following table illustrates how you might use this functionality.

Finance Group	Surcharge Scenario
A	Apply surcharge for bill payments and installment payments
B	No surcharge for bill payments or installment payments
C	Apply surcharge for bill payments No surcharge for installment payments
D	No surcharge for bill payments Apply surcharge for installment payments

**Note:** Finance groups for *Paymentus Surcharge* applications are only used to identify disparate customer groups that have different surcharge requirements. Their setup (e.g. min/max amounts or rate) are not applicable in this case; however, finance groups can still be used elsewhere to assess late fees as before. You may need to set up additional finance groups if your existing groups do not support all of your surcharge scenarios.

Before you can use this functionality you'll need to coordinate with Paymentus to establish surcharge rules in that platform per your requirements. Paymentus uses *payment type codes* to establish these rules. These codes will be provided to you by Paymentus. You'll use the Payment Configuration form in Customer Care to connect these codes with their respective finance groups. The Paymentus Configuration form has a new (second) tab labeled *Payment Type Groups* for this purpose. It lets you set up payment type groups that connect payment type codes to their respective finance groups in the CostGuard system.

**Note:** The Configuration tab on this form has been available in previous versions and provides the same functionality as before.

Once this setup is in place:

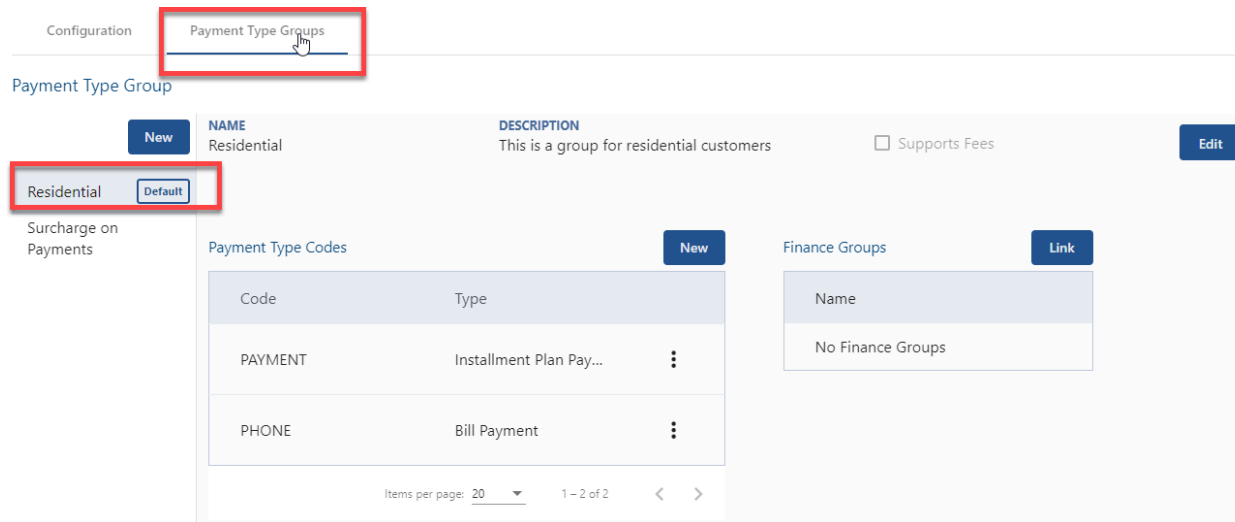
- Surcharges/fees are applied to payments by different finance groups per their Paymentus payment type codes.
- Pending surcharges/fees are indicated in the Agent Dashboard or Customer Portal before the payment is confirmed. This provides an opportunity to cancel the payment if necessary.

## 2.1 Setup – Payment Type Group Tab

Payment type groups are listed on the left side of the tab. Initially this list is empty. At least one group is required to use this functionality. The first group you create will be labeled as **Default**. For example, below, the default group is named *Residential*. It contains two payment type codes: *PAYMENT* and *PHONE*. Once you create the default group it cannot be deleted; however, you can edit it to rename, add/delete payment codes, and link/unlink finance groups. You can also add more groups as needed to cover all payment/surcharge scenarios.

### Paymentus

Integrate with Paymentus for processing payments through IDI web applications.



Configuration

Payment Type Groups

Payment Type Group

**New** **NAME** Residential **DESCRIPTION** This is a group for residential customers ☐ Supports Fees **Edit**

Residential **Default**

Surcharge on Payments

Payment Type Codes **New**

Code	Type	
PAYMENT	Installment Plan Pay...	⋮
PHONE	Bill Payment	⋮

Items per page: 20 1 – 2 of 2 < >

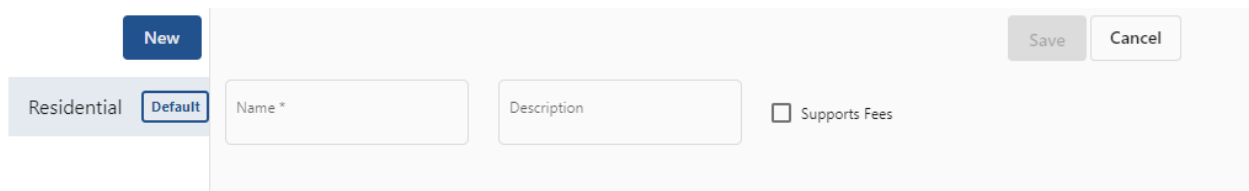
Finance Groups **Link**

Name

No Finance Groups

Click **New** in the Payment Type Group section to add a payment type group. This displays fields for defining the new group. *Name* is required. The *Description* is optional. In addition you can check *Supports Fees* as applicable to identify the group as having surcharges. This check box is for information only.

### Payment Type Group



**New**

Residential **Default**

Name \*

Description

☐ Supports Fees

**Save** **Cancel**



When you select an existing group you can use the buttons on the right to **Edit** or **Delete** the group. **Note:** The default group cannot be deleted. When you select the default group only the **Edit** button is available.

Configuration    Payment Type Groups

Payment Type Group

**New**

Residential    **Default**

Surcharge on Payments

**NAME**  
Surcharge on Payments

**DESCRIPTION**

☒ Supports Fees

**Edit**    **Delete**

Payment Type Codes    **New**

Code	Type	
Bill Surcharge	Bill Payment	⋮
Install Payoff Surcha...	Installment Plan Pay...	⋮

Items per page: 20    1 – 2 of 2    <    >

Finance Groups    **Link**

Name	
Surcharge on Payments	⋮

## 2.1.1 CONNECTING PAYMENT CODES AND FINANCE GROUPS

For a selected payment type group, assign the applicable payment type codes. Click **New** in the Payment Type Code section to add a payment code. In the Create Payment Type Code form enter the *Code* name (as provided by Paymentus) and select a *Type* – **Bill Payment** or **Installment Plan Payoff** - from the drop-down menu.

Create Payment Type Code

Code \*    Type \*

Bill Surcharge    Bill Payment

**Save**    Cancel

If you need to delete a code for a selected group, click the associated ellipsis button.

Payment Type Codes    **New**

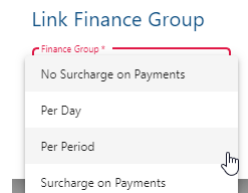
Code	Type	
Bill Surcharge	Bill Payment	⋮
Install Payoff Surcha...	Installment Plan Pay...	⋮

Items per page: 20    1 – 2 of 2

**Delete**

## 2.1.2 LINKING FINANCE GROUPS

To finish payment type group setup, link one or more finance groups to the payment type group. This establishes the payment type code/ finance group connection. Select the payment type group and click **Link** in the Finance Groups section.



**Note:** You can link as many finance groups to a payment type group as required; however, once a finance group is linked to a payment type group, it cannot be linked to another group.

### Paymentus

Integrate with Paymentus for processing payments through IDI web applications.

Configuration

Payment Type Groups

Payment Type Group

New

NAME

DESCRIPTION

Supports Fees

Edit

Delete

Residential

Default

Surcharge on Payments

Payment Type Codes

New

Code	Type	
Bill Surcharge	Bill Payment	⋮
Install Payoff Surcha...	Installment Plan Pay...	⋮

Items per page: 20

1 - 2 of 2

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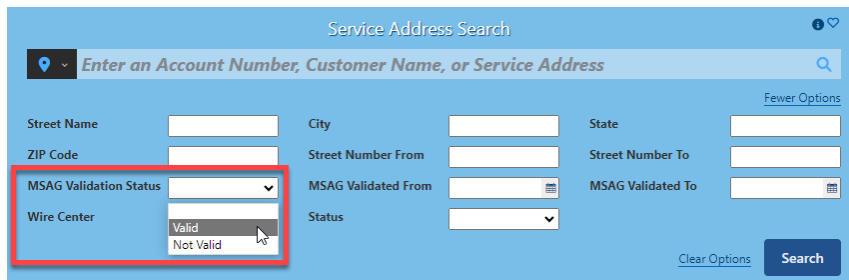
Finance Groups

Link

Name	
Surcharge on Payments	⋮

### 3 Service Address Search – MSAG Validated Filter

In Customer Care OmniSearch, the service address search has a new field to filter search results on MSAG Validation Status. The drop-down menu provides two options: **Valid** or **Not Valid**.

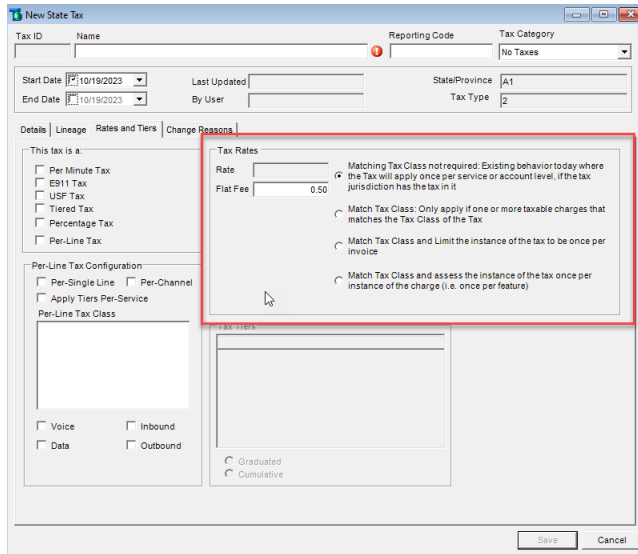


The screenshot shows the 'Service Address Search' interface. At the top, there is a search bar with a location pin icon and the placeholder text 'Enter an Account Number, Customer Name, or Service Address'. Below this, the form is organized into several sections. The 'MSAG Validation Status' dropdown menu is highlighted with a red rectangle. The dropdown is currently open, showing two options: 'Valid' and 'Not Valid'. Other fields in the form include 'Street Name', 'City', 'State', 'ZIP Code', 'Street Number From', 'Street Number To', 'MSAG Validated From', 'MSAG Validated To', 'Wire Center', and 'Status'. A 'Search' button is located at the bottom right of the form.

## 4 New Options for Flat Fee Taxes

New options related to *flat fee* taxes are available when adding/editing a state tax in CostGuard Client Tax Management. **Note:** These options apply when the *Per-line Tax* option is not selected. If *Per-line Tax* is selected these options are ignored.

The Flat Fee options are available on the *Rates and Tiers* tab on the Add/Edit State Tax form (Tax Management > View > Taxes).

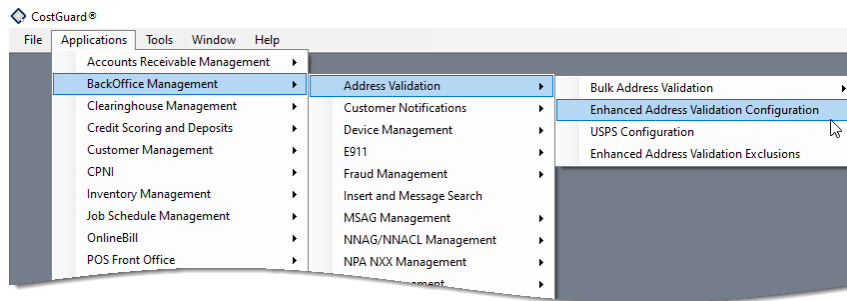


- Matching tax class not required** (Option 1) - A flat charge will be assessed once per account. The CostGuard tax engine will not look for a matching tax class. The tax itself would not need to be configured to any particular tax class since there is no matching involved at the SKU level. It simply assesses one charge to all active accounts. By default, this includes both parent and child accounts, regardless of invoice responsibility.
- Match Tax Class** (Option 2) - The CostGuard tax engine looks for SKUs with an assigned tax class that matches the tax configuration. As long as there is at least one SKU with a matching tax class on an active account, a single instance of tax will be assessed to that account. If an active account has no SKUs that match the tax configuration, no tax will be assessed to that account.
- Match Tax Class and limit to once per invoice** (Option 3) - This is essentially the same functionality as option 2 above, with an extra check to ensure the *apply once per invoice* rule is enforced. **Note:** This option supports the Colorado Retail Delivery Fee (CORDF) as described in this knowledge article: [Support for Colorado State Retail Delivery Fee](#).
- Match Tax Class and assess the instance of tax once per instance of the charge** (Option 4) - The CostGuard tax engine looks for SKUs with matching tax class and assesses the tax or fee based on the number of matches found. For example, if an active account has ten SKUs that match the configuration of the tax, ten instances of the flat tax will be assessed to the account.

## 5 Address Validation at the Township Level

For carriers that use CoreLogic address validation, new functionality in CostGuard Client > BackOffice Management lets you enable/disable address validation at the township level. **Note:** This will incur additional charges when enabled.

To access the township validation setting, go to **Applications > BackOffice Management > Address Validation > Enhanced Address Validation Configuration**.



In the Enhanced Address Validation dialog *Advanced Settings* section, check the **Enable Township FIPS Validation** check box. This setting is disabled (unchecked) by default.

