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Core Release Bulletin

IDI Platform 25.3 Release

March 2025

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About this Document

IDI's Core Release Bulletins describe new Core functionality introduced with the release through either Adaptive (AR) or Feature (FR) requests. Core functionality is defined as a capability that is available to all customers that upgrade to the release, although in some cases additional custom work may be required to use it. This document includes an overview of the new capabilities as well as the required configuration or setup information. Supporting documentation can be found on E-Support under Resources > Knowledge Center and Resources Help Resources.

Additional training opportunities are also available through IDI University. Please contact your Account/Project Manager for more information.

1 Release Summary

1.1 Change Orders/Enhancements

The following change orders and other enhancements are included in this release.

Functional Area	AR/FR	Description
Customer Portal	FR 3646	**Traversing corporate structure on corporate accounts** The portal view for corporate accounts has been enhanced to facilitate traversing the entire corporate structure. The Account Summary page for any parent-level account (one that has child-level accounts) has a new navigation option for viewing the corporate structure. It opens a new Corporate Account page. From there: • For each child account that has billing-active children, you can click to view their children and traverse the corporate tree. • A search option on the Corporate Account page lets you search by account number or customer name. • You can change your view of Customer Portal to any descendent account. Doing this opens the Customer Portal for the selected descendent account. • When viewing another account, you have an option to return to the original account. *Not Invoice Responsible* (NIR) users will not have access to the *Manage Wallet*, *Manage Autopay*, and *Make Payment* pages. This restriction is in place to prevent misapplying payments, which could lead to issues requiring customer support. **Notes**: • No special installation is needed. The new functionality is available for all customers currently using Customer Portal. • This functionality will be deployed as a Customer Portal platform system deployment in March (not with the IDI platform 25.3 release).

Functional Area	AR/FR	Description
Service Number Inventory API	AR 9418	**New endpoint to update inventoried service number** This adds an endpoint to the Number Inventory Service API to update an inventoried service number. The endpoint will support a single operation: PATCH. The following minimum properties of an inventoried service number will be patchable: • Inventory Status • Available Date • NRUF Sub-Category • Is Ported-In Number • Ported To • Ported From • Notes • Inventory Groups All business rules enforced by the client when editing an inventoried service number will be enforced by the PATCH operation. See the Number Inventory Service API documentation in the IDI knowledge center for details.
Ordering – Web API	AR 9377	**Price matrix look-up for prospective customers via web API** Price matrix functionality in Desktop Client Product Management lets you vary pricing for catalog items based on zone (NPA NXX) and/or contract SKU. Prior to this release, price matrix look-up through the web API required account information which precluded price look-ups for prospective customers who did not have an establshed account (i.e. neither an existing customer nor a prospect). With this release, *Catalog Item Lookup* and *Catalog Search* operations in the Catalog Service support matrix look-ups without using account information. See Catalog Service API documentation in the IDI knowledge center for details.
Customer Care - CPNI	AR 9409	**Using driver license number for CPNI verification** This adds Driver License Number as a CPNI Verification option in the CPNI Settings in Customer Care (Manage > Settings. CPNI Settings). When enabled, the Driver's License Number field will be presented on the CPNI Authentication dialog for an account with a blank input field. This prompt works in tandem with other verification options, such as Account Password Prompt or Security Question/Answer Prompt.

1.2 Resolved Known Issues

The following known issues have been resolved in this release.

Functional Area	PR	Description
Corporate Accounts	84804	**Child accounts missing from corporate parent's usage file** Corporate accounts have a process where child usage files are zipped and moved to their own folders, and then written out to a parent csv file. Child files would be missing from the csv file when the child usage files were deleted from the base directory before they were written out to the parent's usage file. The process has been updated to ensure the zipping process occurs after the supplemental file has been created to avoid this scenario.
Product Management	84854	**Issues with Discount Category Config DELETE** Attempting to delete a discount category would occasionally time out before the deletion occurred depending on a customer's data profile. The performance around deleting a discount category has been significantly improved so that deletions can occur without error.
Retail Installment Plans	84843	**Future installment tenders rarely not added to order** A *Future Installment* tender type is added when tendering a transaction with a retail installment plan. The purpose of this tender is to account for the remaining balance of the installment plan in the general ledger (amount not accounted for when the transaction is tendered). On rare occasions, this tender was not being added to retail transactions, causing a *GL Rounding Error*. This issue does not cause the transaction to fail, nor does it impact installment plan processing. A root cause has not been determined. Logging has been added surrounding finalization of transactions with an installment plan to assist troubleshooting this issue going forward.
Retail Installment Plans	84855	**Inaccurate retail installment plans due to prebilling invoice calculation errors** Prebilling invoices caused inaccuracies in installment plan data because they were incorrectly accounted for when calculating remaining payments and balances. As a result, the system recorded an extra payment whenever a prebill occurred, generating incorrect information on the Retail Installment Plans form. Installment plan data no longer includes prebilled invoices. This improves the accuracy of remaining installments and balances, preventing incorrect actions based on inaccurate data.

Functional Area	PR	Description
Customer Portal	84877	**Self Registration Login Not Honoring Subscriber's Profile** In Customer Portal, after account self-registration is complete subscribers are presented the *Account Registered* dialog with a *Continue to Sign In* link. This link did not include a parameter for *profile*, resulting in subscribers being sent to the login page with the default profile. An update was made to include the profile in the link and send subscribers to the login page with the correct designated profile. **Note**: This update will be deployed as a Customer Portal platform system deployment in March (not with the IDI platform 25.3 release).

2 Customer Portal Enhanced Capabilities for Corporate Accounts

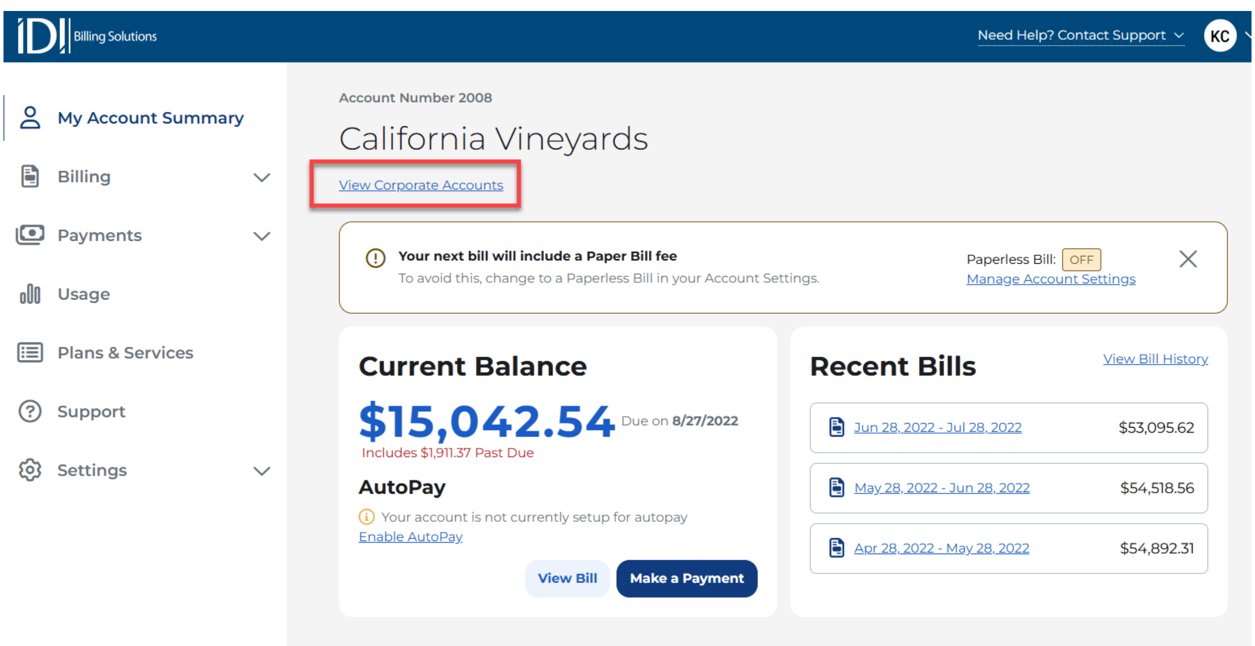
The portal view for corporate accounts has been enhanced to facilitate traversing the entire corporate structure. The Account Summary page for any parent-level account (one that has child-level accounts) has a new navigation option for viewing the corporate structure. It opens a new Corporate Account page. From there:

- For each child account that has billing-active children, you can click to view the children and traverse the corporate tree.
- A search option on the Corporate Account page lets you search by account number or customer name.
- You can change your view to any descendent account. This opens the Customer Portal for the selected descendent account.
- When viewing another account, you have an option to return to their original account.

Note: Not Invoice Responsible (NIR) users will not have access to the Manage Wallet, Manage Autopay, and Make Payment pages. This restriction is in place to prevent misapplying payments, which could lead to issues requiring customer support.

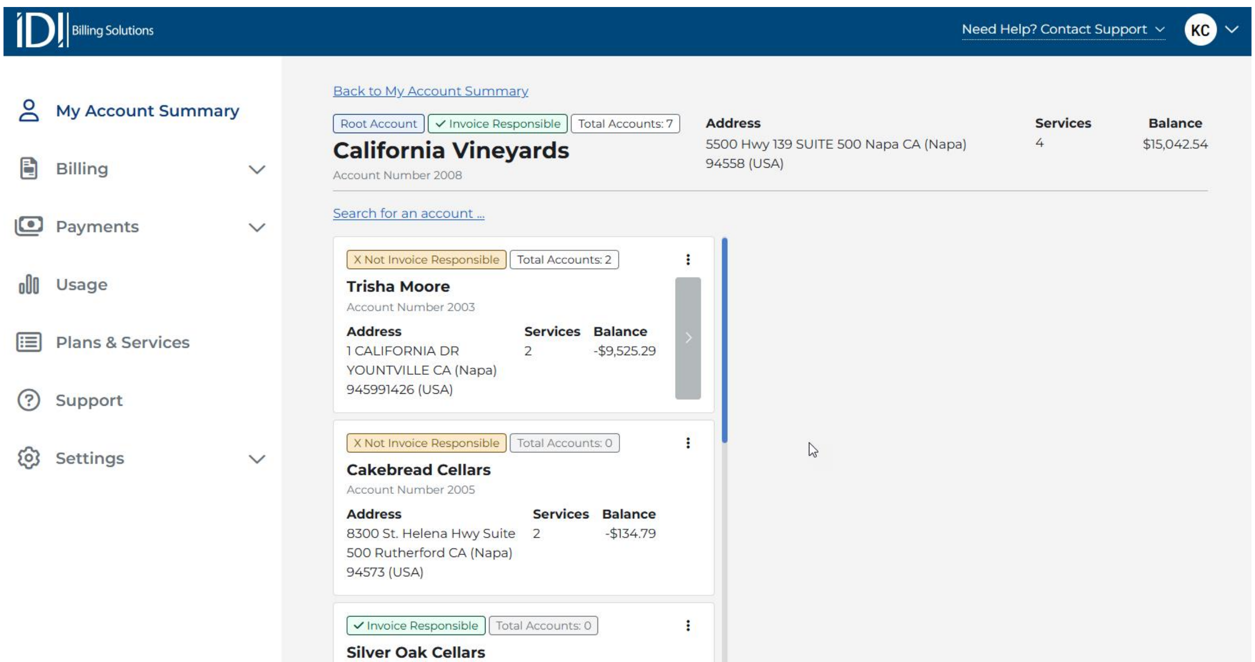
2.1 Corporate Account Page

Corporate parent accounts can view their child/descendant accounts in Customer Portal via the **View Corporate Accounts** link on the Account Summary page. This link is only available for corporate accounts with one or more billing-active child/descendant accounts.



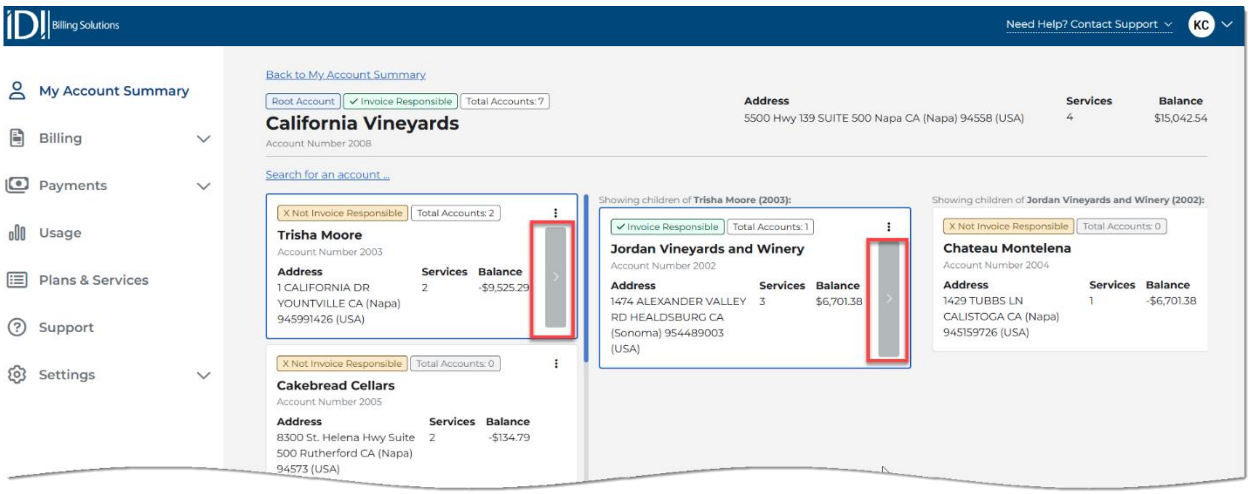
The link opens the new Corporate Account Page with key information for the parent account currently logged in, and a list of the parent account's first-level child or descendant accounts. Labels above the parent account name indicate whether it is a *root* account, meaning it is at the highest level in the corporate structure. In the corporate hierarchy, labels show the status of invoice responsibility, and the number of descendant accounts associated with that parent account. Account Number, Address, and Balance are also viewable.

The first-level child or descendant accounts list is presented below the corporate parent card and search link. Each card includes key information for the descendant account. Labels show the status of invoice responsibility and the number of descendant accounts associated with that account in the corporate hierarchy. Account Number, Address, Total Services and Balance are also viewable. Clicking the **Back to Account Summary** link brings you back to the Account Summary page.



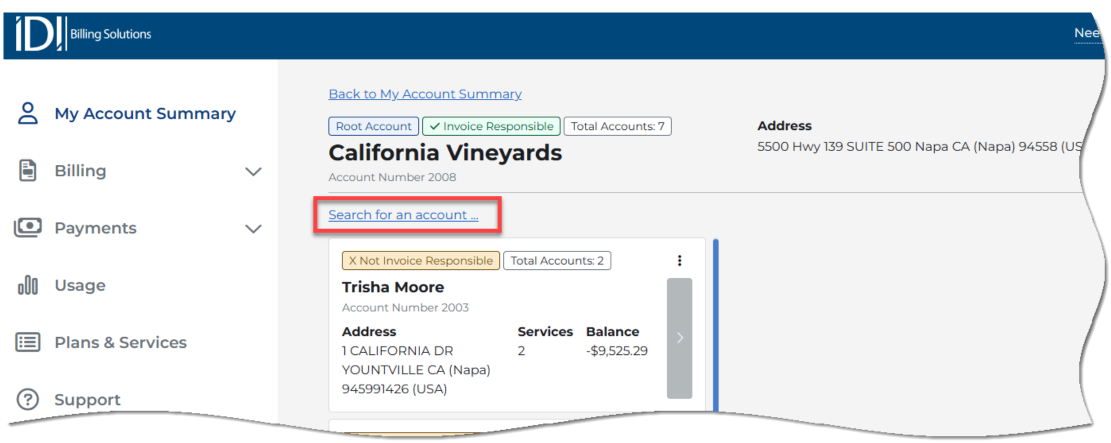
2.2 Traversing the Corporate Structure

You can traverse the corporate structure by selecting the arrow button on the corporate child/descendant card. If no button exists, that account has no billing-active child/descendant accounts. As you traverse further down the corporate structure, the next level child/descendant accounts are presented in columns to the right.



2.3 Search For a Child/Descendant Account

You can search for a child/descendant account by clicking the **Search for an account link** below the corporate parent card.

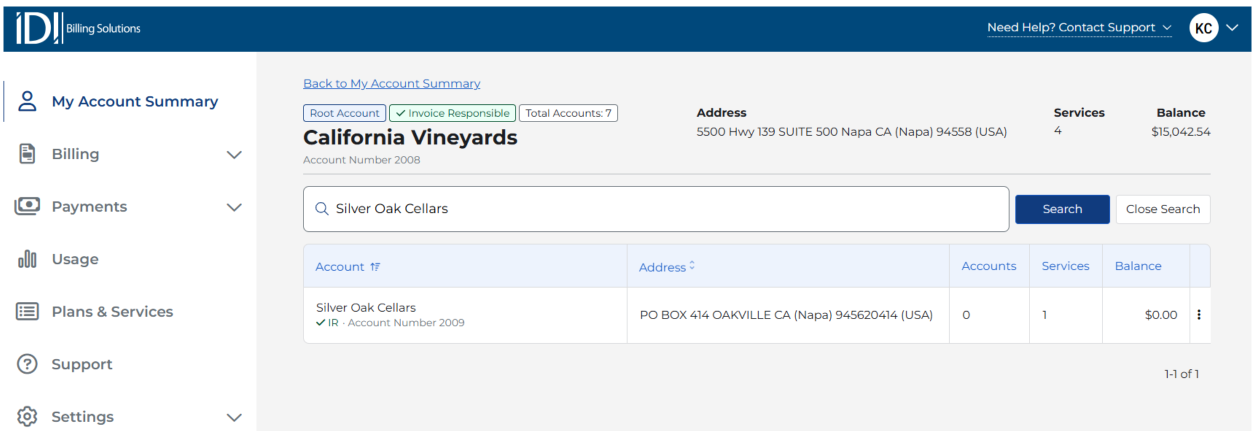


This opens the search page. The search bar supports the following:

- Account Number (includes partial matches, case insensitive)
- Customer Name (includes partial matches on customer name, case insensitive)

Enter the search criteria in the bar and click **Search**. Search results are presented in grid format.

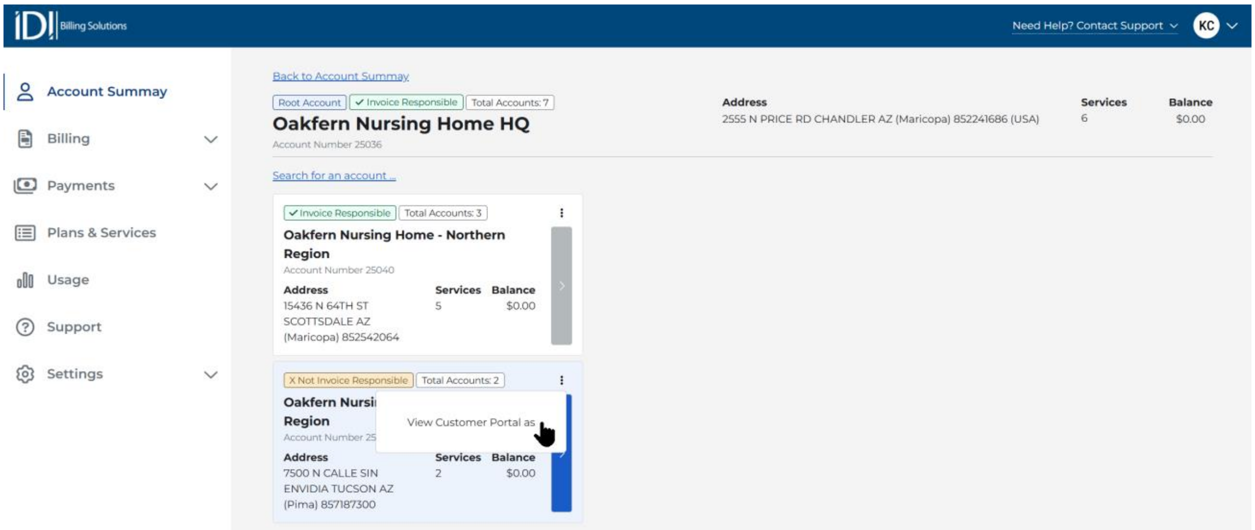
Clicking the **Close Search** button returns you to the **Corporate Account** page at any point.



2.4 View Customer Portal as a Corporate Child/Descendant Account

The **View Customer Portal as this account** option is available on the Corporate Account page for:

- All child/descendant accounts listed under the corporate account
- All search results on the Corporate Account page

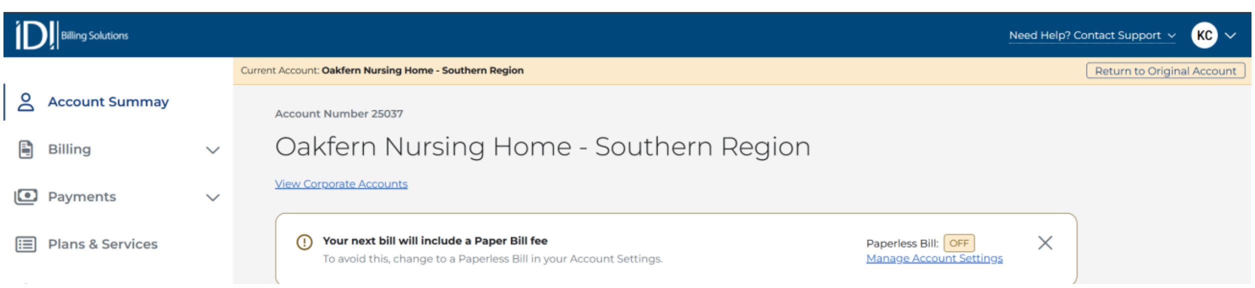


Clicking the **View Customer Portal as this account** option redirects you to the main landing page of the Customer Portal for the chosen descendant account. A visual banner remains visible at the top of the page while viewing Customer Portal as a descendant account, clearly indicating the current view mode. While viewing as a descendant account, you can access all Customer Portal pages except:

- Account Settings
- Paymentus Pages for non-invoice responsible accounts

The following options are not available for non-invoice responsible accounts whether :

  - Manage Wallet
  - Manage Auto Pay
  - Make Payment



Click the **Return to Original Account** button redirects you to the original account you initially logged in as.

Using Driver License Number for CPNI Verification

This adds Driver License Number as a CPNI Verification option in the CPNI Settings in Customer Care (Manage > Settings. CPNI Settings). When enabled, the Driver's License Number field will be presented on the CPNI Authentication dialog for an account with a blank input field. This option works in tandem with other verification options, such as Account Password Prompt or Security Question/Answer Prompt.