

Core Release Bulletin

*IDI Platform
26.5 Release*

May 2026

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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
Product Catalog - Paperless Billing Incentive	FR 3746	Omit states from paperless billing consideration Paperless Billing Incentive setup in the web Product Catalog lets you specify states to not consider for Paperless Billing. This is equivalent to the <i>omit account status</i> functionality delivered in the 26.4 release.
Orders	FR 3761	Miscellaneous enhancements This release provides the following enhancements: <ul style="list-style-type: none"> The <i>Restore Service Workflow</i> action now observes all three <i>Service Information Item</i> filters (Service Processing Actions, Service Catalogs, and Service Items). Previously, it only observed the Service Items filter. Improved performance of Customer-Search <i>type-ahead</i> on New Order page. Various bug fixes and formatting enhancements.
Customer Portal – Admin & Subscriber View	AR 9441	Applying one-time payments to a specific invoice When making a one-time payment in Customer Portal, subscribers can allocate the payment to a specific invoice if this functionality is enabled in their profile.
Bulk Data Import	N/A	Internal maintenance updates

1.2 Resolved Known Issues

The following known issues have been resolved in this release.

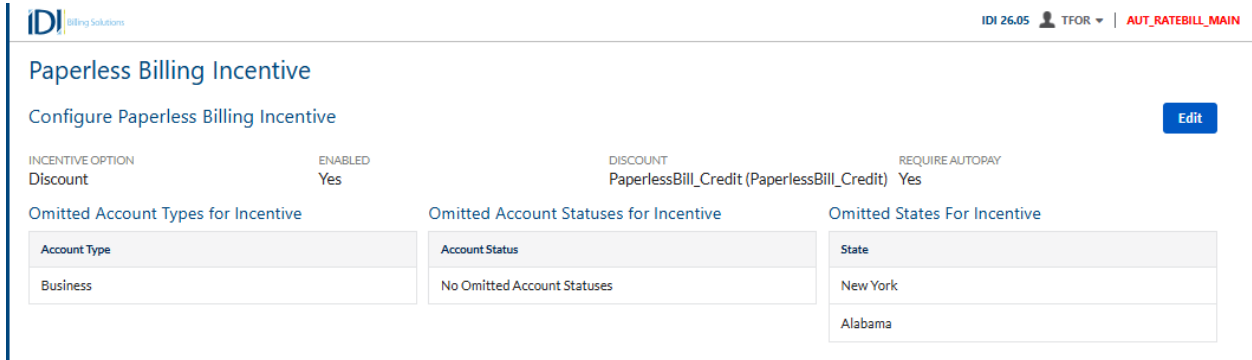
Functional Area	PR	Description
Customer Portal – Subscriber View	85067	Incorrect service amounts on Plans and Services page The total monthly charge amount for a specific service was incorrectly displayed on the Plans and Services page in Customer Portal. The amount only included the monthly plan charge and did not include other monthly charges for the service. This has been fixed.
Customer Portal – Subscriber View	85128	Billing History page did not finish loading This could occur when the IDI server and the Customer Portal device were in different time zones. This has been fixed.

Functional Area	PR	Description
Customer Portal - Admin	85099	<p>Password Changed Template missing from Customer Portal Profile In some cases, Communications Templates were not available to select on the Notifications tab when configuring a Customer Portal Profile. This has been fixed.</p>
Tickets	85015	<p>Tickets not restricting available Ticket Types for users Updated the Tickets web module to honor the User Groups setting on the Ticket Type (Admin Console Data Management) and limit the Ticket Types available for selection accordingly.</p>
AdvancePay	85110	<p>Unable to remove autorenewal on a service In Customer Care, clicking Remove for a service number correctly deletes autorenewal for the service.</p>
Provisioning	85116	<p>Edit button on Code field missing when adding a new Variable This was fixed by adding the <i>Manage Variables</i> permission to the <i>Provisioning Admin</i> role.</p>

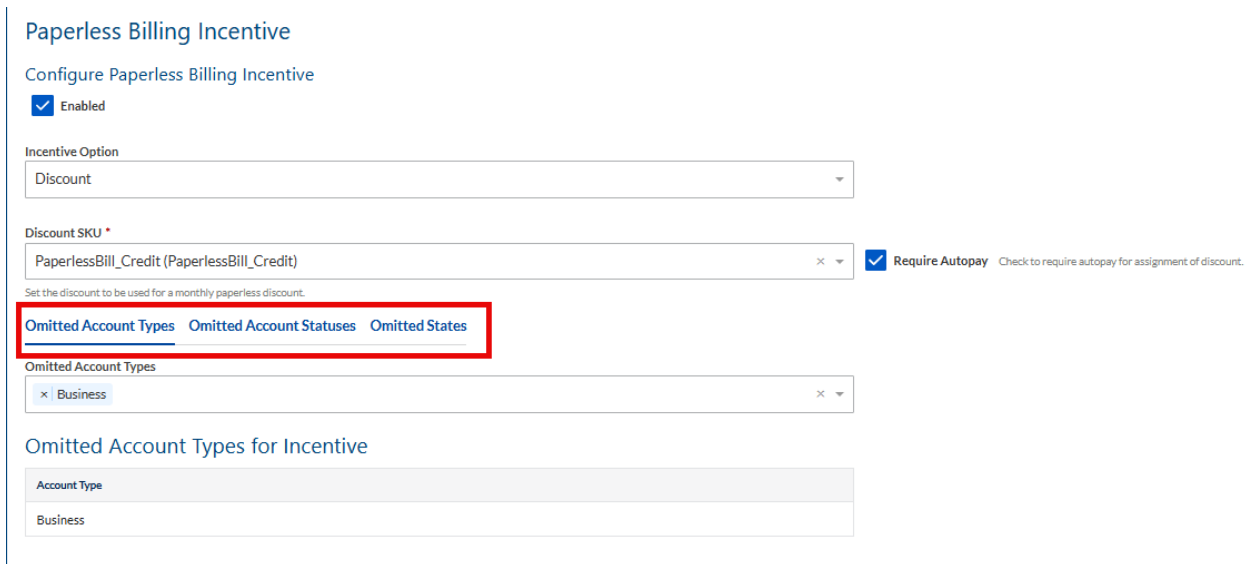
2 Omitting States from the Paperless Billing Incentive

Paperless Billing Incentive setup in the web Product Catalog lets you specify States to omit from Paperless Billing consideration, in addition to Account Types and Account Statuses as previously supported.

In *View* mode, currently omitted items are listed under their respective categories.



In *Edit* mode, the selectors for omitting each are now available on separate tabs.



Click the **Omitted States** tab and then use the drop down menu to select one or more states.

Paperless Billing Incentive

Configure Paperless Billing Incentive

Enabled

Incentive Option

Discount

Discount SKU *

PaperlessBill_Credit (PaperlessBill_Credit)

Require Autopay Check to require autopay for assignment of discount.

Set the discount to be used for a monthly paperless discount.

Omitted Account Types Omitted Account Statuses **Omitted States**

Omitted States

Alaska Arizona 1 more...

- Alaska
- Arizona
- District of Columbia
- Aguaascalientes, Mexico
- Alabama
- Alan Islands
- Alberta

Once selected, you can remove a state from the list by clicking the associated remove icon (X).

Paperless Billing Incentive

Configure Paperless Billing Incentive

Enabled

Incentive Option

Discount

Discount SKU *

PaperlessBill_Credit (PaperlessBill_Credit)

Require Autopay Check to require autopay for assignment of discount.

Set the discount to be used for a monthly paperless discount.

Omitted Account Types Omitted Account Statuses **Omitted States**

Omitted States

Arizona Alaska 1 more...

Omitted States For Incentive

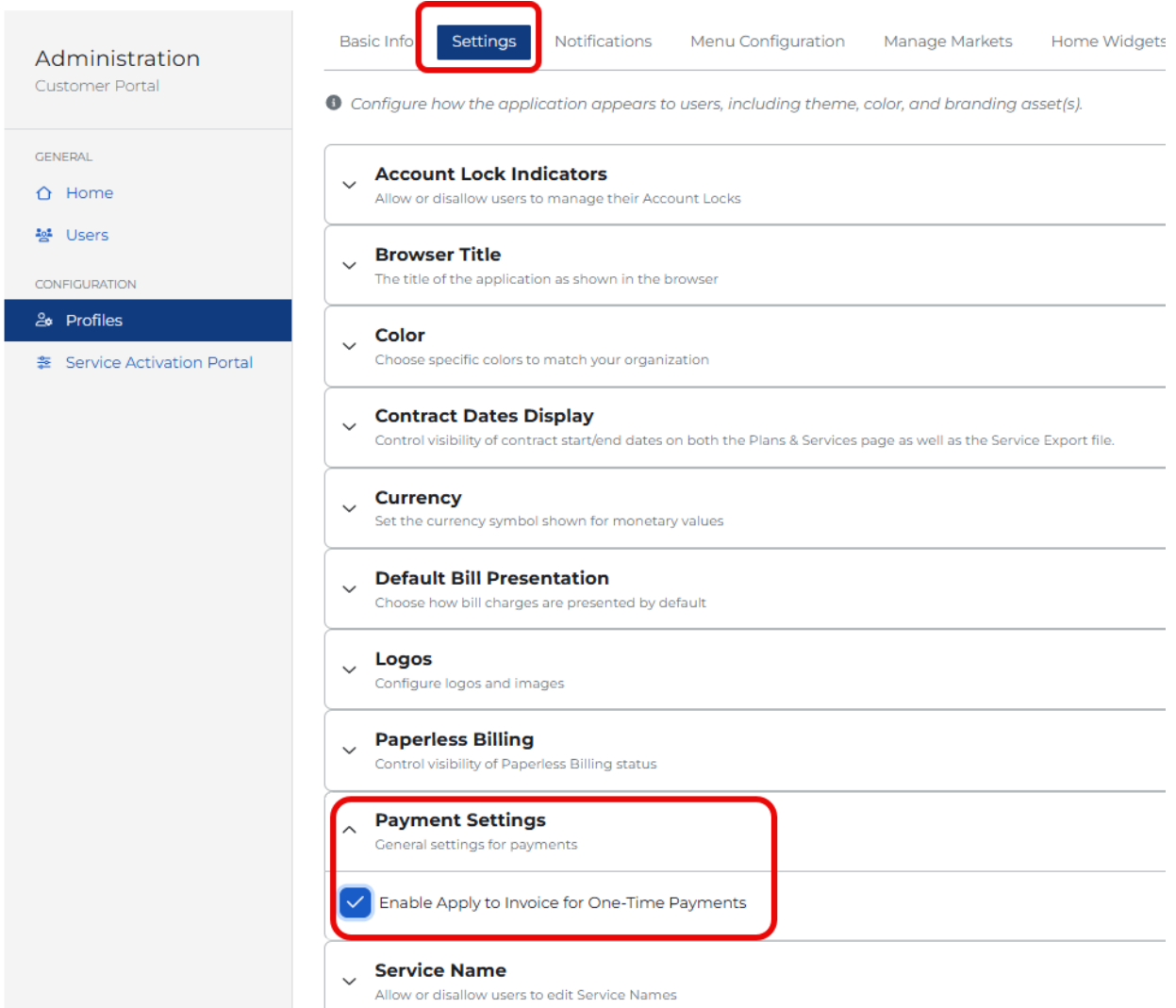
State
Arizona
Alaska
New Mexico

3 Applying One-time Payments to a Specific Invoice

When making a one-time payment in Customer Portal, subscribers can allocate the payment to a specific invoice when the functionality is enabled in their profile.

3.1 Setup

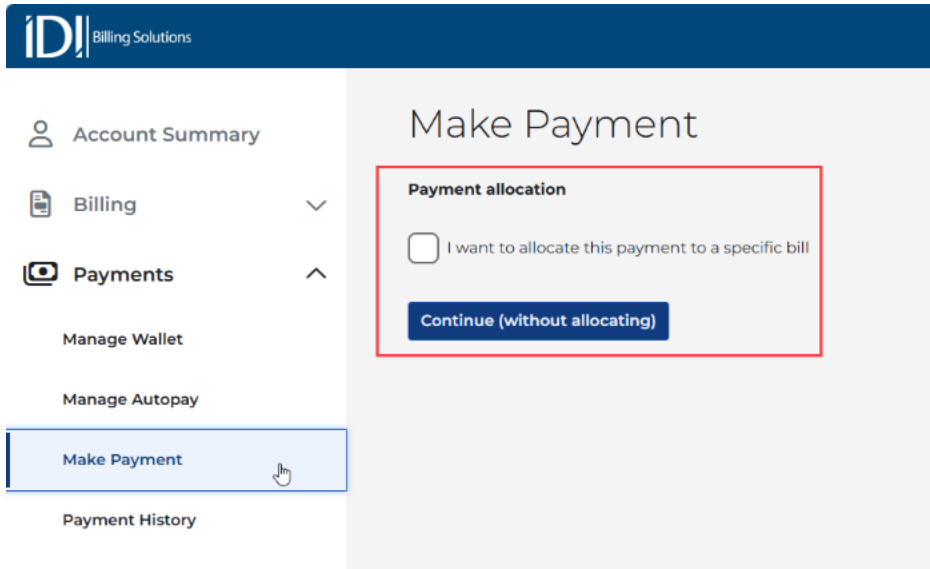
This capability is disabled by default. Customer Portal administrators can enable it on a Profile basis via **MANAGE > Customer Portal Administration**. The *Settings* tab has new *Payment Settings* sub-menu with the **Enable Apply to Invoice for One-Time Payments** setting.



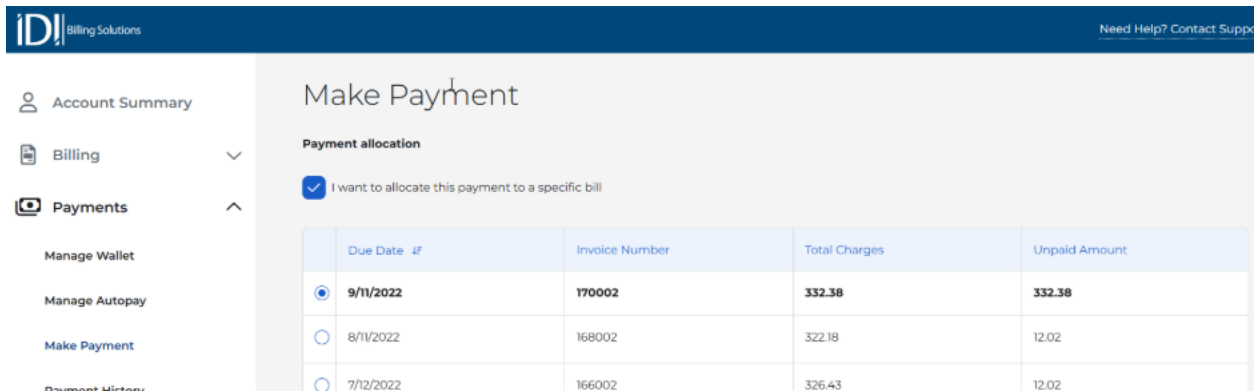
The screenshot shows the 'Administration' page for the 'Customer Portal'. The left sidebar contains a navigation menu with 'GENERAL' (Home, Users) and 'CONFIGURATION' (Profiles, Service Activation Portal). The 'Profiles' item is selected. The main content area has a top navigation bar with 'Basic Info', 'Settings', 'Notifications', 'Menu Configuration', 'Manage Markets', and 'Home Widgets'. The 'Settings' tab is highlighted with a red box. Below the navigation is a help icon and the text: 'Configure how the application appears to users, including theme, color, and branding asset(s)'. The settings are organized into expandable sections: 'Account Lock Indicators', 'Browser Title', 'Color', 'Contract Dates Display', 'Currency', 'Default Bill Presentation', 'Logos', 'Paperless Billing', 'Payment Settings', and 'Service Name'. The 'Payment Settings' section is expanded and highlighted with a red box, showing a checked checkbox for 'Enable Apply to Invoice for One-Time Payments'.

3.2 Applying Payments to a Specific Invoice

If the setting is enabled, choosing **Payments > Make Payment** will present subscribers with a new option to allocate the payment to a specific bill or continue without allocating:

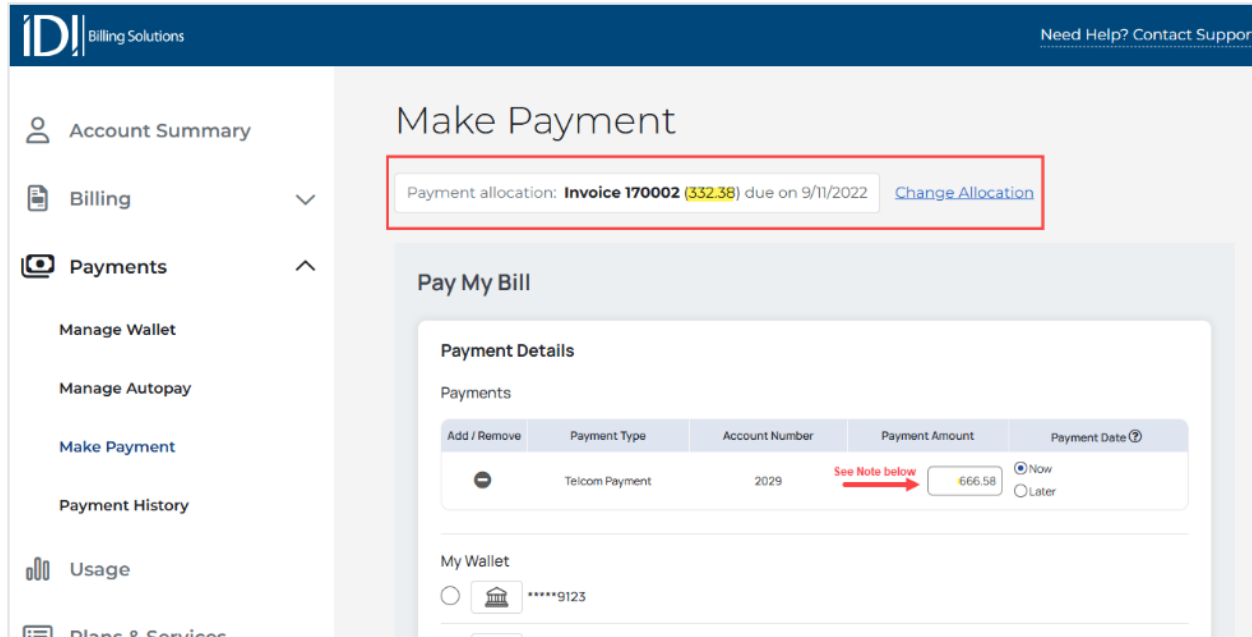


Choosing to allocate to a specific bill will display a list of unpaid invoices on the account:



Making a selection is optional. Only one can be selected at a time. If no invoice is selected, the payment is applied to the oldest invoice with an unpaid balance. **Note:** Selecting an invoice for allocation will not change how the payment amount defaults in the Payment Details.

Once an invoice is selected, the invoice and the open amount will be displayed above the payment details throughout the Make Payment flow.



Note:

The open amount of the selected invoice will not appear in the Payment Details, as this defaults based on Paymentus settings and is not controlled by IDI.

Subscribers can also change the invoice allocation anytime during the flow, up until they confirm the payment. Changing the allocation will bring them back to the list of unpaid invoices .