

Core Release Bulletin

16.2 Release

June 2016

For External Use Only

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 leverage 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 [Online Help](#) and the [Release Summary Notes](#).

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

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FR 2536: Reports Enhancements

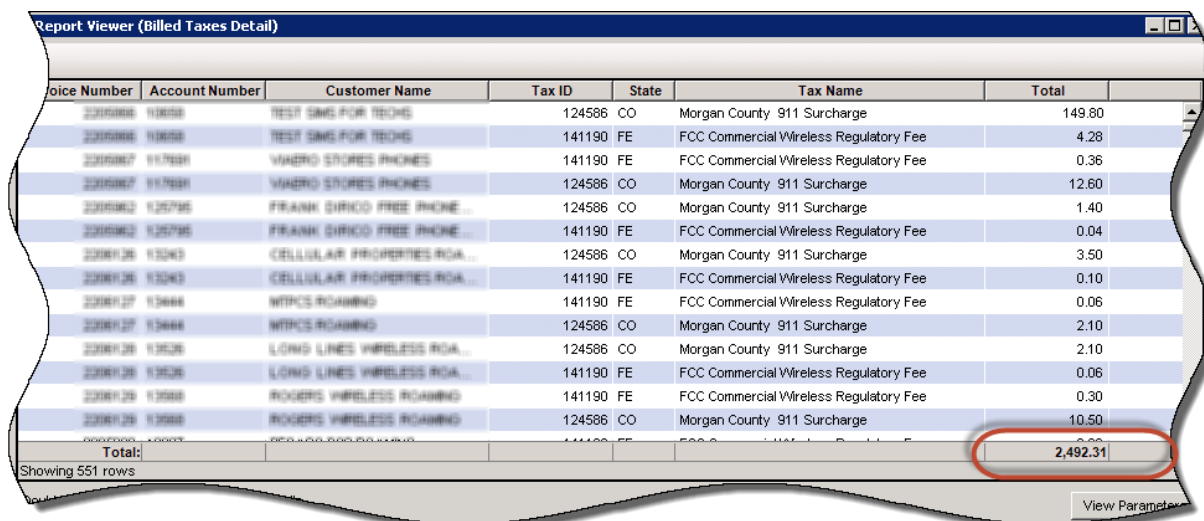
Business Need

The following 6 new features were added to Reports:

- *Enhanced the Billed Taxes Detail Report* to improve overall usability.
- *Deployed new subfolders to reorganize the existing Point of Sale (POS) Reports* – to improve the user experience.
- *Enhanced existing POS reports to further align with the current Enhanced Installment Plans (EIP) solution* – to maintain Product consistency.
- *Add 3 new Reports* to complement the EIP solution and to improve the POS Sales auditing experience:
 - Installment Plan Sales Detail
 - Installment Plan Payoff Detail
 - Serialized Retail Product Sales Audit

New Functionality

- The Billed Taxes Detail report was enhanced with the following:
 - Added 'Invoice Number' and 'Account Number' as set-up parameters
 - Added a 'Total' row that sums the 'Total' column

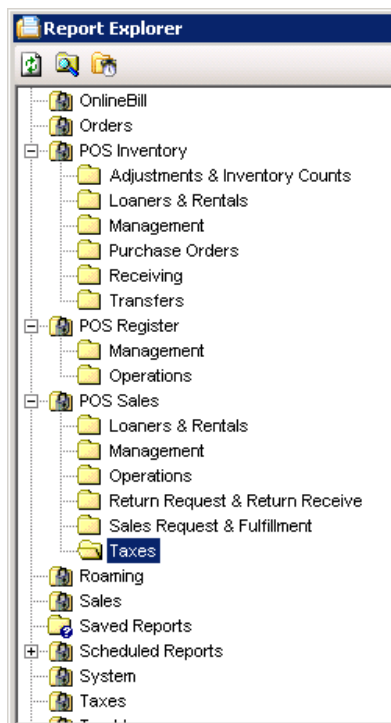


Invoice Number	Account Number	Customer Name	Tax ID	State	Tax Name	Total
2200000	10000	TEST SIMS FOR TECHS	124586	CO	Morgan County 911 Surcharge	149.80
2200000	10000	TEST SIMS FOR TECHS	141190	FE	FCC Commercial Wireless Regulatory Fee	4.28
2200007	117001	WAGRO STORES PHONES	141190	FE	FCC Commercial Wireless Regulatory Fee	0.36
2200007	117001	WAGRO STORES PHONES	124586	CO	Morgan County 911 Surcharge	12.60
2200002	125795	FRANK DIRCO FREE PHONE	124586	CO	Morgan County 911 Surcharge	1.40
2200002	125795	FRANK DIRCO FREE PHONE	141190	FE	FCC Commercial Wireless Regulatory Fee	0.04
2200126	132043	CELLULAR PROPERTIES ROA...	124586	CO	Morgan County 911 Surcharge	3.50
2200126	132043	CELLULAR PROPERTIES ROA...	141190	FE	FCC Commercial Wireless Regulatory Fee	0.10
2200127	134044	WTPCS ROAMING	141190	FE	FCC Commercial Wireless Regulatory Fee	0.06
2200127	134044	WTPCS ROAMING	124586	CO	Morgan County 911 Surcharge	2.10
2200128	135026	LONG LINES WIRELESS ROA...	124586	CO	Morgan County 911 Surcharge	2.10
2200128	135026	LONG LINES WIRELESS ROA...	141190	FE	FCC Commercial Wireless Regulatory Fee	0.06
2200128	135026	LONG LINES WIRELESS ROA...	141190	FE	FCC Commercial Wireless Regulatory Fee	0.30
2200128	135026	ROCKERS WIRELESS ROAMING	124586	CO	Morgan County 911 Surcharge	10.50
Total:						2,492.31

Showing 551 rows

View Parameters

- The following were added to Report Explorer:
 - 6 new subfolders within the existing POS Sales folder
 - 6 new subfolders within the existing POS Inventory folder
 - 2 new subfolders within the existing POS Register folder
 - Existing reports within the original 3 POS folder have been redistributed into the appropriate new subfolder.



- The following existing POS reports were enhanced to further support the Enhanced Installment Plan Solution and its impact on performed POS Front Office transactions:
 - Sales Detail
 - Sales Summary
 - Sales Detail with Taxes
 - Sales Detail by Store
 - Sales Summary by Store
 - Sales Summary by Store by day
 - Sales Summary by User
 - Sales Summary with Taxes
 - Sales Tax Summary by Location
 - Sales and Use Tax Summary
 - Transaction Activity Detail
 - Corporate Check Refund

Depending on the design of each listed report, the following have also been enhanced:

- The calculation of Extended Amount and Billed Amount,
- The amount of Installment Plans Sold/Returned
- Misc. usability improvements

- **New Report: Installment Plan Sales Detail**

The new report provides details to audit how an Installment Plan (when sold with an applicable serialized retail product) was applied and if it was done correctly according to the IDI customer's business process.

[illegible]

Run Report - Installment Plan Sales Detail

☐ Run in Background

Run Time: 05/18/2016 07:07:10 PM

Save As:

Path: /Saved Reports

☐ Send a follow-up when this report is done.

Location: *

Finalized From Date: * 5/18/2016

Finalized To Date: * 5/18/2016

Account Number:

Service Number:

SKU:

Equipment ID:

Incl. Returns: ☐

☐ Show SQL Statement

OK Cancel

- **New Report: Installment Plan Payoff Detail**

The new report provides details on performed Installment Plan Payoffs (in one list) to review, and if the POS transaction was done correctly according to the IDI customer's business process.

Report Viewer (Installment Plan Payoff Detail)

Receipt Number	Account Number	Customer Name	Payment Description	Payoff Amount	Payment Type	Installment Plan SKU	Installment Plan Description	
375-14-0170	476940	JEFFERY SMITH	375-14-0170 : Pay off for Installment Plan VMA	105.00	Cash Payment	375-14-0170	Migrated Installment	5
375-48-0128	257670	KYLE CHRISTENSEN	375-48-0128 : Pay off for Installment Plan VMA	348.00	Cash Payment	375-48-0128	Migrated Installment	5
375-17-0274	477700	LORETTE BORGMEIER	375-17-0274 : Pay off for Installment Plan VMA	487.50	Credit Card	375-17-0274	Migrated Installment	5
375-04-0195	440100	RICHARD WILLIAMS	375-04-0195 : Pay off for Installment Plan VMA	132.00	Cash Payment	375-04-0195	Migrated Installment	5
375-04-0196	440100	RICHARD WILLIAMS	375-04-0196 : Pay off for Installment Plan VMA	132.00	Cash Payment	375-04-0196	Migrated Installment	5
375-17-0289	300400	MORGAN KOUNDOVSKY	375-17-0289 : Pay off for Installment Plan VMA	60.00	Cash Payment	375-17-0289	Migrated Installment	5
375-04-0202	300900	DEANA CRANFORD	375-04-0202 : Pay off for Installment Plan VMA	377.00	Cash Payment	375-04-0202	Migrated Installment	5
333-01-0310	260000	DANA SORENSEN	333-01-0310 : Pay off for Installment Plan VMA	45.00	Check Payment	333-01-0310	Migrated Installment	5
375-25-0064	5000	ANTHONY VRAJESHI	375-25-0064 : Pay off for Installment Plan VMA	300.00	Cash Payment	375-25-0064	Migrated Installment	5
375-28-0208	262400	MEDAN DEHMAN	375-28-0208 : Pay off for Installment Plan VMA	100.00	Cash Payment	375-28-0208	Migrated Installment	5
375-16-0235	454700	THOMAS PALMER	375-16-0235 : Pay off for Installment Plan VMA	348.00	Cash Payment	375-16-0235	Migrated Installment	5
375-24-0141	430200	LORENA HITE	375-24-0141 : Pay off for Installment Plan VMA	319.00	Cash Payment	375-24-0141	Migrated Installment	5
375-27-0276	440000	CLEVELAND SLEDGE	375-27-0276 : Pay off for Installment Plan VMA	261.00	Cash Payment	375-27-0276	Migrated Installment	5
375-22-0219	5000	ANTHONY VRAJESHI	375-22-0219 : Pay off for Installment Plan VMA	153,402.28	Cash Payment	375-22-0219	Migrated Installment	5

Showing 637 rows

View Parameters

Run Report - Installment Plan Payoff Detail

☐ Run in Background

Run Time: 05/18/2016 07:03:55 PM

Save As:

Path: /Saved Reports

☐ Send a follow-up when this report is done.

Location: *

Finalized From Date: * 5/18/2016

Finalized To Date: * 5/18/2016

Account Number:

☐ Show SQL Statement

OK Cancel

- **New Report: Serialized Retail Product Sales Audit**

The new report provides details to audit how a Serialized Retail Product (when sold) went from its defined retail price to the amount it was tendered for in the performed POS transaction.

Report Viewer (Serialized Retail Product Sales Audit)

SKU	Description	Equipment ID	Unit Price	Promotional Discount Amount	On-the-Fly Discount Amount	Net Sales Price	Quantity	Total Installment Amount	Installment Amount Paid at Sale	Sales
S1500	Universal - G&D TRIPLE 440 SIMCARD...	8901450114080272706	0.00	0.00	0.00	0.00	1	0.00	0.00	0.00
L7000	LIFELINE FEATURE PHONE - 3561730...	356173053431008	50.00	(25.01)	0.00	24.99	1	0.00	0.00	0.00
P5127	LG G3 - 014088001762276	014088001762276	360.00	0.00	0.00	360.00	1	345.00	0.00	15.00
S1500	Universal - G&D TRIPLE 440 SIMCARD...	8901450114080299881	0.00	0.00	0.00	0.00	1	0.00	0.00	0.00
WARR365DAY	365 Day Warranty - 014088001762276	014088001762276	0.00	0.00	0.00	0.00	1	0.00	0.00	0.00
S1500	Universal - G&D TRIPLE 440 SIMCARD...	8901450114080295046	0.00	0.00	0.00	0.00	1	0.00	0.00	0.00
S1500	Universal - G&D TRIPLE 440 SIMCARD...	8901450114080299865	0.00	0.00	0.00	0.00	1	0.00	0.00	0.00
S1500	Universal - G&D TRIPLE 440 SIMCARD...	8901450114080299873	0.00	0.00	0.00	0.00	1	0.00	0.00	0.00
			410.00	(25.01)	0.00	384.99	8	345.00	15.00	

Showing 8 rows

View Parameters

Run Report - Serialized Retail Product Sales Audit

☐ Run in Background

Run Time: 05/18/2016 07:09:25 PM

Save As:

Path: /Saved Reports

☐ Send a follow-up when this report is done.

Location: *

Finalized From Date: * 5/18/2016

Finalized To Date: * 5/18/2016

Account Number:

Service Number:

SKU:

Equipment ID:

Inventory Category:

Incl. Returns: ☐

☐ Show SQL Statement

OK Cancel

FR 2551: Expanded System Rules for Managing Retail Product Equipment IDs

Business Need

IDI customers have indicated that they are experiencing the assignment of MEIDs/IMEIs that do not observe the known (and CG supported) industry standards for Equipment IDs (ESNs, MEIDs, IMEIs) assigned to specific Technology Types (CDMA or GSM). Scenarios stemming from certain Manufactures/Distributors have been happening where the provided Equipment IDs are not aligned with the known standards. These standards (supported in CG) prior to this feature were:

For Technology types, CDMA/TDMA or Dual Mode, the entered Equipment ID is valid per any of the following:

- As an 8-character Hexadecimal ESN (supporting numbers 0 to 9 and/or letters A- F)
- As an 11-digit decimal ESN (supporting numbers 0 to 9)
- As a 14-character Hexadecimal MEID (supporting numbers 0 to 9 and/or letters A- F)
- As an 18 or 19-digit decimal MEID (supporting numbers 0 to 9)

For the GSM technology type, the entered Equipment ID is a 15 or 16-digit IMEI (supporting numbers 0 to 9)

This new solution does not alter any existing Product Catalog configuration. It adds to the already-supported Equipment ID-related use cases (as noted above) to also include the following:

For CDMA/TDMA or Dual Mode:

If the entered Equipment ID is either 15 or 16 digits in length, then the solution will remove the 1 or 2 extra characters (prior to saving) to enter and save the value as a 14-digit Hexadecimal.

For GSM:

If the entered Equipment ID is a 14-digit IMEI (supporting numbers 0 to 9), then the solution will automatically calculate the 15-digit (aka 'Check Digit') using the Luhn Algorithm. (**Note:** Specific use case is a GSM handset being assigned a 14-digit value)

So, all applicable CG Applications are enhanced to support these expanded Technology Type – Equipment ID rules.

New Functionality

The following areas of CostGuard have been enhanced to support the expanded Technology Type - Equipment ID rules:

- *POS Front Office*
 - POS Make Sale, Quick Sales, Bulk Retail Sale, Blind Returns, Fulfillment Requests/Sales, Receive Return and Swap Equipment.
- *POS Back Office*
 - Receiving (all 3 types), Transfers (all 3 types), Inventory Adjustments & Inventory Counts
- *Customer and Back Office (Device) Management*
 - Add New Device, Device File Import, Samsung Manifest File Upload

- Add New Service wizard – Equipment Tab, Service Detail Pages, the ‘Specify Wireless Information’ window when duplicating
- Swap Equipment

Enhanced ‘Searches’ when using the Equipment ID as the search criterion to support these rules:

- If the user enters 13 digits or less (in the Equipment ID field), then the search will return a result that is an exact match of the (searched for) Equipment ID.
- If the user enters 14, 15, or 16 digits (in the Equipment ID field), then the system appends a wildcard after the 14th digit and returns results with Equipment IDs that match the entered 14 digits + wild card.
- If the user enters 17 digits or less (in the Equipment ID field), then the search will return a result that is an exact match of the (searched for) Equipment ID.
- If the user enters 18 or 19 digits (in the Equipment ID field), then the system appends a wildcard after the 18th digit and returns results with Equipment IDs that match the entered 18 digits + wild card.
- If the user enters more than 19 digits, then the search will return an exact match of the (searched for) Equipment ID.

The following Searches in the CG Client have been enhanced to support the new rules:

- The POS Front Office Searches (using the Equipment ID/Serial Number):
 - Front Office Transaction Search, Loaner/Rental Search, Warranty Search, Return Request Search, POS Product Catalog Search.
- The POS Back Office Searches:
 - Back Office Transaction Search, Inventory Search, Adjustment Search, POS Product Catalog Search.
- Customer and Back Office (Device) Management Searches:
 - Customer Search, Device Search, Device History Search

Applicable Web Services are also enhanced to support these new/expanded rules.

FR 2576: Performing a Manager Override of the Rules of an Installment Plan

Business Need

After using the Enhanced Installment Plan (EIP) solution, IDI customers began requesting support for use cases where they needed to perform a ‘correction’ or simply sell an installment plan with values outside of what is supported by the configured EIP rule.

The solution is the ability to perform a Manager Override during the sale of an EIP where the user is then able to edit the displayed values in the installment plan detail window.

This functionality addresses certain POS Sales and Exchange use cases (especially after installments have been billed) where the desired outcome is an Installment Plan that can be tailored to match existing conditions (i.e. keep the same number of months remaining the same).

New Functionality

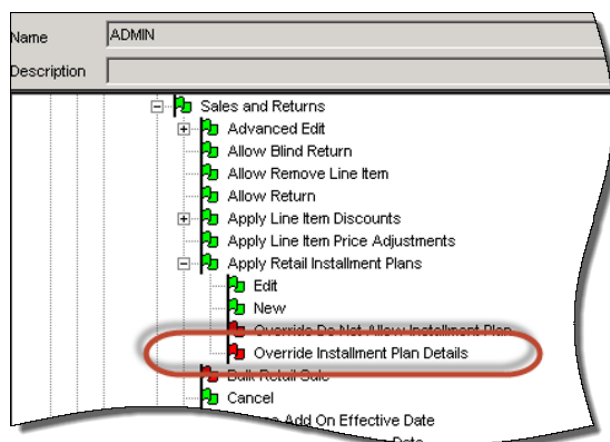
Configuration

- The ability to perform the Manager Override of an Installment Plan's Rules in POS Make Sale and/or Make Sales Request is regulated by new permissions.

The new permission, **Override Installment Plan Details**, is located in these paths:

- *Application > CostGuard Client > POS > Front Office > Sales and Returns > Apply Retail Installment Plans, and*
- *Application > CostGuard Client > POS > Front Office > Sales Requests > Apply Retail Installment Plans*

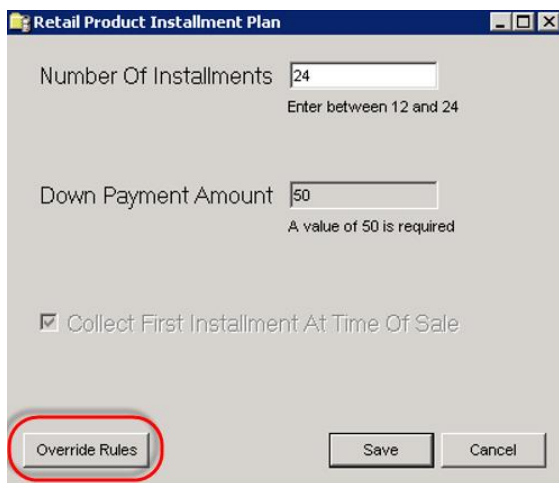
Note: These permissions are disabled by default.



Note: Only users with the permission enabled can perform a manager override.

How It Works in POS

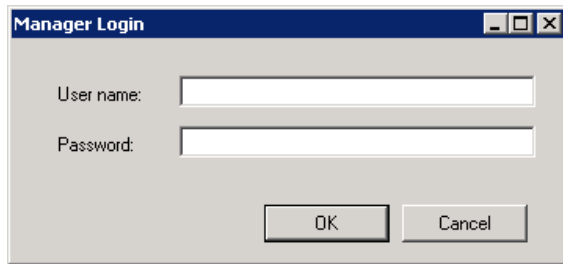
- A new button, **Override Rules**, has been added to the existing Retail Product Installment Plan window.



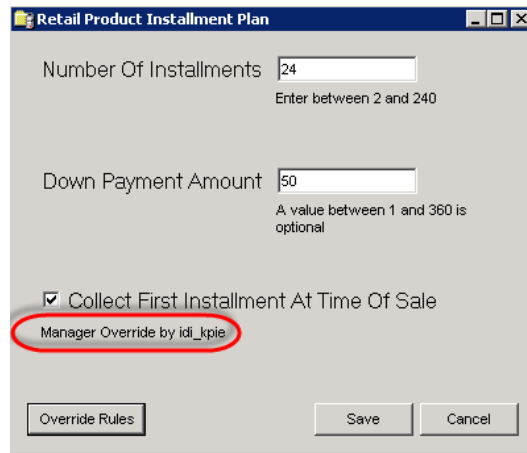
- This button is always enabled and provides the ability to modify the details of a configured rule of the Installment Plan.

For example, the Installment Plan Profile's rule was configured to require a down payment of \$50 and collect the first installment (as shown above). However, for this specific sale, the amount for both needs to be set to \$0. The user's selection of the Override Rules button initiates the process to do so.

- The **Override Rules** button displays a message indicating that only a permissioned user can perform this process.
 - If the user selects **Manager Override** and has the *Override Installment Plan Details* permission disabled (red), the **Manager Login** window is displayed.

- If the user selects **Manager Override** and has the *Override Installment Plan Details* permission enabled (green), OR if another user with the permission enabled completed the Manager Login, then the system re-displays the Retail Product Installment Plan window. The fields will be enabled and the user can enter the modified details.
- The user can then enter in the desired values/selection, as desired.
- The window also indicates the user that had performed the Manager Override.



FR 2657: MasterCard BIN Range Update

Business Need

MasterCard is adding a new primary account BIN range 222100-272099 in October 2016 that will be processed with, and in, the same manner as the existing BIN range 510000-559999. Merchants will want to be in a position to accept and support the new two-series BIN range by January 1, 2017.

New Functionality

To support this change, the following applications were modified to accept, validate, and save card type of 'MasterCard', when a card number in the range of 222100-272099 is used:

- CostGuard E-Pay
- CostGuard POS
- OnlineBill

Note: The Care application only uses hosted iframe payment pages and does not determine card type. Card type is passed back and stored as part of the payment gateway API response.

Supported Releases

- 9.0716 SP2 and forward
- 9.0646

Customer Impact

Customers who are not on a supported release, will not be able to process transactions with cards containing the new BIN range. Affected end-user customers will need to use a different card to pay for the transaction.

FR 2659: Minimum Charge on Finance Group for Corporate Accounts

Business Need

Billing was improperly assessing minimum finance charges on corporate accounts when one or more NIR children in a corporate account are configured with a minimum finance charge and a partial payment was made on the IR parent account.

As a result, this caused multiple non-invoice responsible children to each assess a minimum finance charge.

New Functionality

When billing a corporate account, non-invoice responsible children balances are now rolled up with invoice responsible parent balances for finance charge assessment. Finance charges are not only assessed on invoice responsible parents (no longer on non-invoice responsible children).

An invoice-responsible parent can still be configured with a minimum finance charge, but that charge will be assessed only once for the entire corporate account.

FR 2660: SQL Server 2014 Support

Business Need

Support for SQL Server 2014 has been added to CostGuard and is required for 16.2.

Customer Impact

1. CG 16.2 customers using replication (and customers controlling their own DB servers) will need to upgrade their DB servers to SQL Server 2014.

FR 2661: OnlineBill German Localization Enhancements

Business Need

A customer needed to deploy a translated version of OnlineBill (OLB) to their end users in Germany.

New Functionality

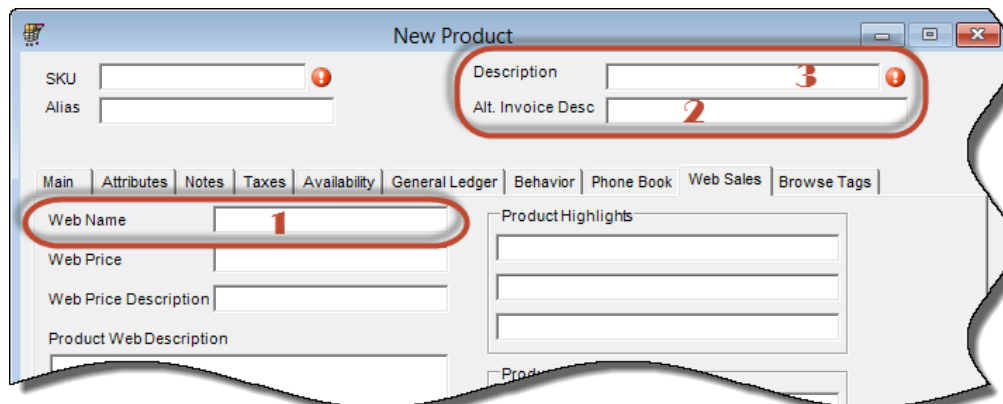
OnlineBill has been updated to now display German content for nearly all aspects of the application. The user's browser language setting is detected and displays the appropriate version.

Configuration

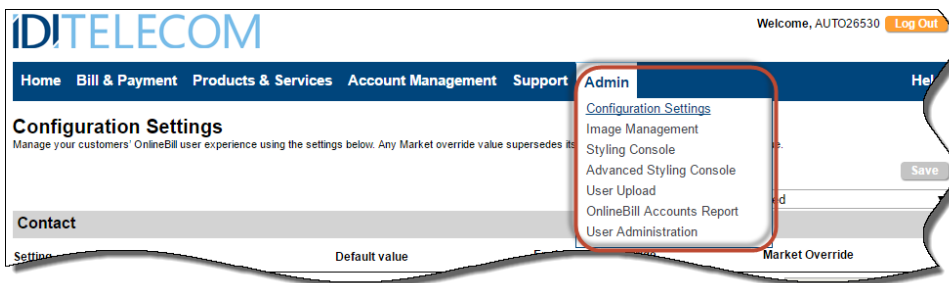
The following items must be configured by the customer:

- Translated Product Catalog values for products, contracts, etc. OLB first looks for and will display (1) the Web Name value, (2) else Alt. Invoice Desc value, (3) else Description value.

Applications > Product Management > Product Catalog > Product/Contract/etc > Web Sales tab



- Override values, images and content available via the Admin section of OLB including but not limited to:
 - Any customer controlled environment or market override items, intended for display to the end user, should be entered in German (such as T&Cs, email notification content, 'Contact Us' content, etc.).
 - Any English-based ads, displayed on the login page or home page, will need to be replaced with German-based ads by the customer.



Notes: Translated content is derived from a combination of the Microsoft Translator Text Translation API and customer feedback. IDI makes no guarantee as to the applicability or accuracy of any translated content. Consequently, customers should review the application accordingly.

Additionally, some seed data, such as descriptors generated by billing system processes (such as account posting transactions), are not translated. Unexpected error messages, including those coming back from the web service, are also not translated.

FR 2667: Ability to Bypass Service Number Validation

Business Need

The IDI Orders Web Application needed the ability to add a service with a service number that was not 10-digits in length. The existing validation method, 'ValidateStandardServiceNumberLength', was checking for and requiring the fixed length value. For example, the Equal Access (EA) Base Service Type must have service numbers be equal to and only equal to 10 characters (per PR 81277).

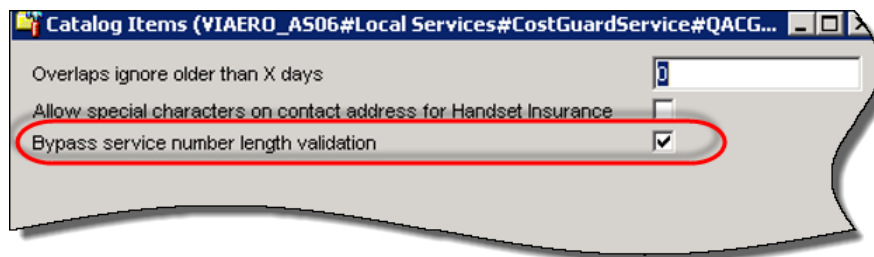
The issue was originally reported by Mitel UK in Case #179018 and PR#81277. For non-US service numbers (for EA), Mitel was attempting to enter in Service Numbers (using IDI Web Apps- Orders) with lengths that were not equal to 10. Attempts resulted in the solution returning "[LoggingNumber=500361] The Service Number field must be 10 characters long when the class is 'Equal Access'."

The developed solution under this FR is a system setting that would bypass the use of the 'ValidateStandardServiceNumberLength' method.

New Functionality

- To bypass the service number length validation, a new setting, *Bypass Service Number Length Validation*, has been added to Config Console:

Local Services > Object Engine > Customer Management > Catalog Items



Notes: Services should be restarted after the checkbox is checked/unchecked. This setting is applied to the entire system/environment.

- Applicable Web Services have been enhanced to support the new setting and the non-10-digit values can also be entered in the Orders application.

AR 6892: Limiting Choices for Adjustment Types

Business Need

When adding an Adjustment to a customer's account, the list The list of available Adjustment Types can be quite large. Having so many types to choose from, often resulted in users selecting the wrong adjustment type.

New Functionality

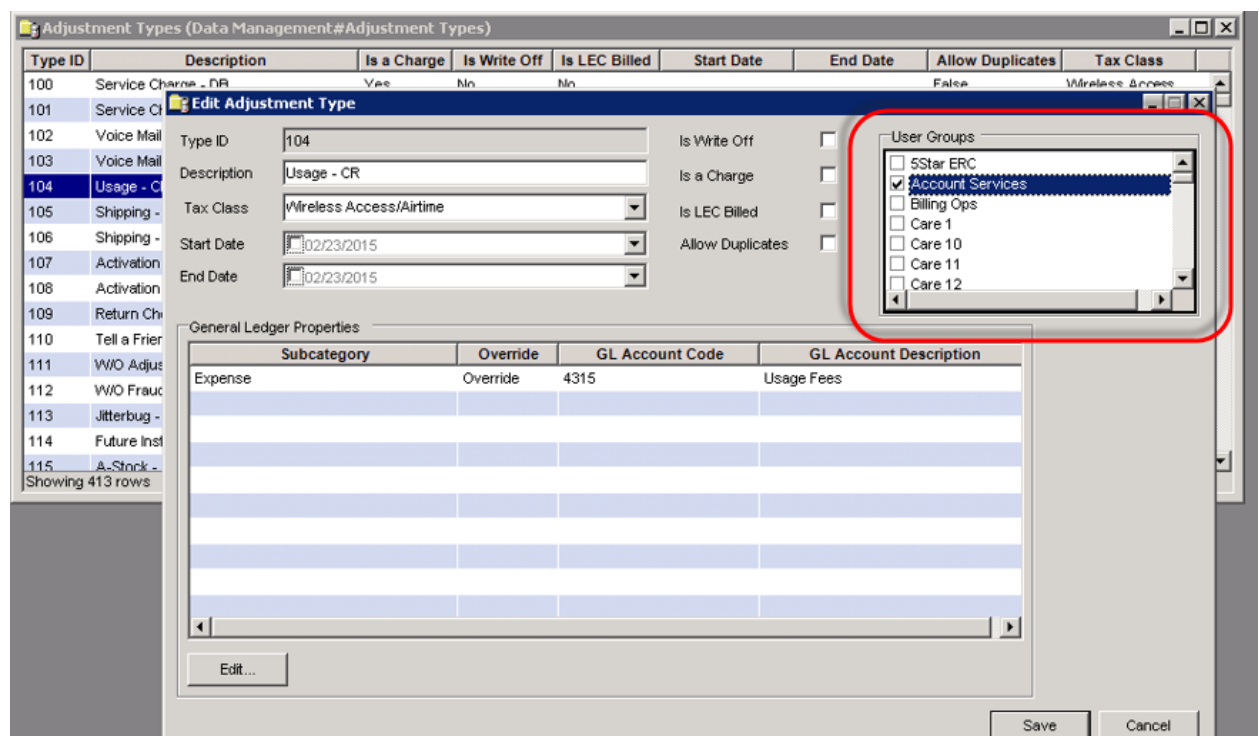
CostGuard Client menus, for selecting an Adjustment Type, can now be limited based on User Group. To support this change, a new control was added to the Adjustment Type table in Data Management.

Adjustment type configuration now supports specifying which user groups will have an adjustment type available for selection when a user in the group is logged into CostGuard Client.

Data Management Setup – Filtering by User Groups

- Added a new User Groups multi-select list box.

Note: Not selecting any group makes the Type available to all users.



Type ID	Description	Is a Charge	Is Write Off	Is LEC Billed	Start Date	End Date	Allow Duplicates	Tax Class
100	Service Charge - DR	Yes	No	No			False	Wireless Access
101	Service Charge - CR							
102	Voice Mail							
103	Voice Mail							
104	Usage - CR							
105	Shipping -							
106	Shipping -							
107	Activation							
108	Activation							
109	Return Charge							
110	Tell a Friend							
111	W/O Adjust							
112	W/O Fraud							
113	Jitterbug -							
114	Future Install							
115	A-Stock -							

Subcategory	Override	GL Account Code	GL Account Description
Expense	Override	4315	Usage Fees

AR 7038: Automated Account Write Off

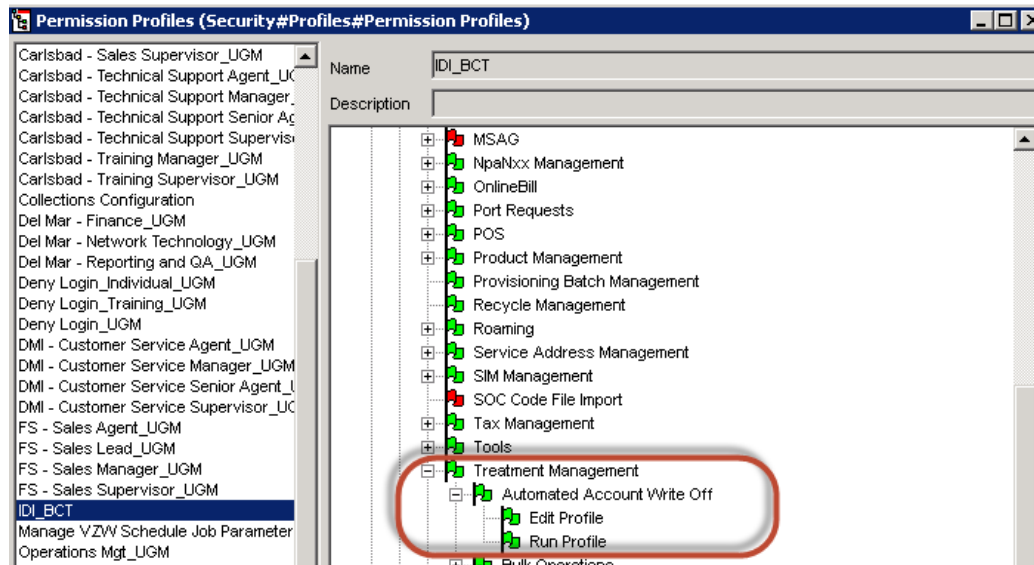
Business Need

A new configurable automated process was created to facilitate writing off past due accounts.

New Functionality

- Added new screens to create, manage, and run rules (profiles) for automated account write off.
 - A profile is a set of criteria to select accounts to be written off, and actions to treat those accounts.
- Created new scheduled job for periodic processing of one or more profiles.
- Hard-coded rule to write off **only final billed accounts**
 - Having an invoice dated AFTER the account disconnect date.
- Configurable criteria to select accounts:
 - Balance Thresholds/Age
 - Account Type
 - Account/Collection Statuses
 - Disconnect Reason(s)
- Configurable write off actions:
 - Write off balance to one or more selected adjustment types
 - Set new account/collection statuses
 - Display Alert text when account is opened in CostGuard

Permissions



Separate permissions were added to view, edit, and run profiles:

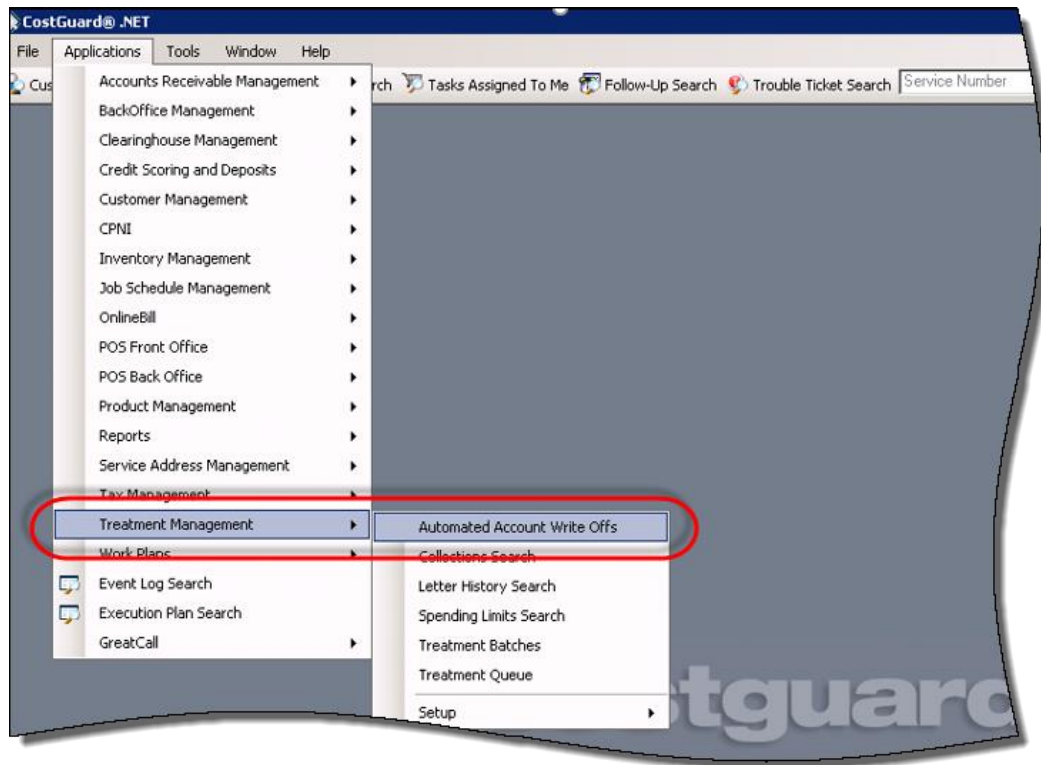
- **Automated Account Write Off** – When enabled, users can access the profiles grid and add/edit profiles form in read-only mode.
- **Edit Profile** – When enabled, allows you to add, edit, and delete profiles.

Note: You cannot run profiles unless the Run Profile permission is also enabled.

- **Run Profile** – When enabled, allows you to run profiles in the test and run mode.

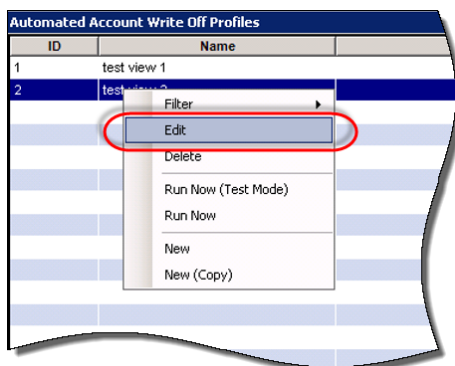
Note: When this setting is enabled, users cannot add, edit or delete profiles unless they have the Edit Profile permission enabled.

New Treatment Management Menu Item to Access Profiles



Managing Profiles

From this form, users can create a new profile (from scratch), create a new profile by copying an existing profile (New Copy), edit an existing profile, delete an existing profile, and run a profile (in run or test mode).



Add/Edit Automated Account Write Off Profiles

Add/Edit Automated Account Write Off Profile

Name:

Description:

Selection Criteria

Account Number:

Balance Thresholds

☒ Include if balance is > in the balance aging bucket

☐ Include if Total Balance is <

Account Type to Include

- ☒ _Residential
- ☒ _Safety Device
- ☐ Business
- ☐ Centricity
- ☐ Certified Resellers
- ☐ Confidential

Account Status to Include

- ☐ Active
- ☒ Disconnected/FINAL BILL
- ☐ Hotline Due to Non-payment
- ☐ SETUP
- ☐ Test Status

Disconnect Reason to Include

- ☐ Automated Clean-up Disconnect
- ☐ Business - Resident Deceased
- ☐ Business - Resident Move Out
- ☐ Cancelled by mail/invoice-No reason given
- ☐ Cost - Overages/Fees-CSR

Collection Status to Exclude

- ☐ 5STAR DPP
- ☐ Collections
- ☒ Deferred Payment Plan
- ☐ Out of Collections
- ☐ Past Due 15 Day Letter Sent
- ☐ Past Due 15 days

Write Off Rules

Write Off Adjustments

Adjustment Type	Balance Write Off %
W/O Adjustment Value Added Services - CR	4.20
W/O Adjustment Taxes - CR	12.67
W/O Adjustment Usage - CR	31.64
W/O Adjustment MRC - CR	51.49

Change Account Status to:

Change Collection Status to:

Apply Alert to Account:

Actions:

- This screen allows authorized users to specify and run rules for writing off accounts.
- If you open this form by selecting an existing rule (Edit or New Copy), the search criteria and write-off actions fields, are populated accordingly.
- If you choose to create a new profile from scratch all fields are blank.

- The Selection Criteria fields specify the rules for selecting which accounts to write off.
 - **Account Number** allows users to select a single account for write off.

Note: *Entering an account number disables the Account Type, Account Status, and Collection Status fields.*
 - **Balance Thresholds** allows users to specify two balance thresholds on an optional basis:
 - a *Minimum Balance* threshold within a selected *Balance Aging Group* (e.g. only write off the account if the amount in the *90 Days Past Due* group is greater than \$10.00).
 - a *Maximum Total Balance* threshold (e.g. only write off the account if the total amount due is less than \$5000.00).

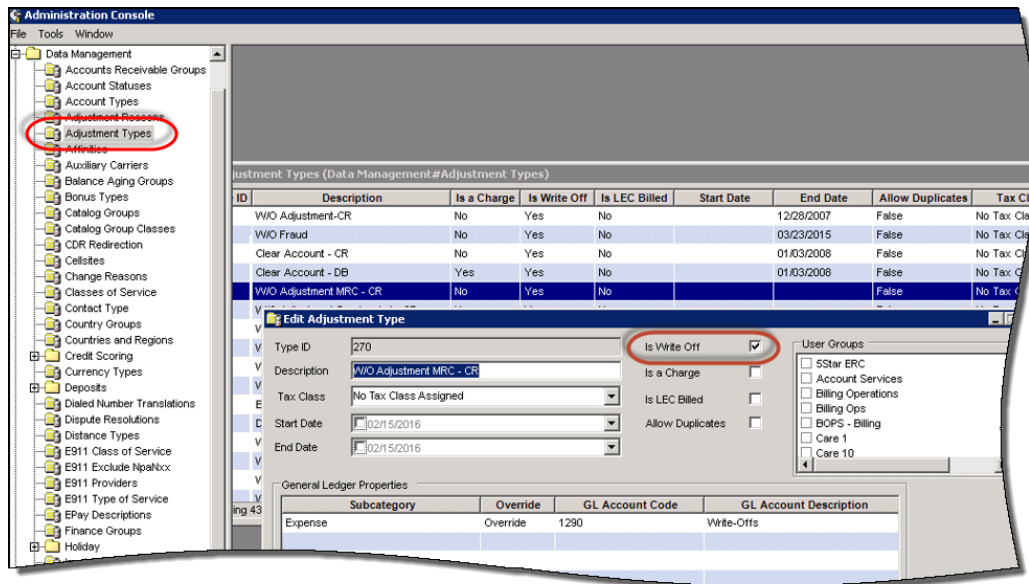
Users must check the associated check box for each of the balance thresholds to apply the rule; otherwise, the balance thresholds are ignored.
 - **Account Type, Account Status, Collection Status, Disconnect Reason** allow you to optionally select one or more items (or none) in each of these categories.

Note: *Selected Collection statuses are excluded; all other selections are for inclusion.*
- **Actions** provides an area for specifying the following actions to perform on all accounts found by the search criteria.
 - **Write Off Adjustments** allows users to distribute the total amount to be written off over one or more adjustment types, and specify a write-off amount (as a percentage) for each specified adjustment type.

Only certain adjustment types are available for selection based on adjustment type configuration (Data Management table). To add an adjustment type, right-click on the empty row.

The total percentage for all adjustment types combined must add up to 100% of the total balance. Attempting to save a profile where the total adjustments do not add up to 100% results in an error.
 - **New Account Status** and **Collection Status** drop down menus allow users to specify the new account and collection statuses once the account has been written off.
 - **Alert Text**, if text is entered into the field, it will be displayed when the account is opened in CostGuard.

Selecting Adjustment Types Available to Use for Write Off



Using the Adjustment Types Data Management table, mark the applicable Adjustment Types to use for write offs (Is Write Off). Only Adjustment Types marked this way can be used in the Automated Write-off process.

Running a Profile from the GUI

Both the *Automated Account Write Off Profiles* and *Add/Edit Automated Account Write Off Profiles* forms, support running a profile in test mode or run mode.

Running a profile in test mode displays a list of accounts to be written off with the following related information:

- Account Number
- Account Name
- Account Type
- Bill Cycle
- Days Past Due
- Total Balance to be written off
- Specified adjustment types with their respective percentages
- Original and new account status
- Original and new collection status

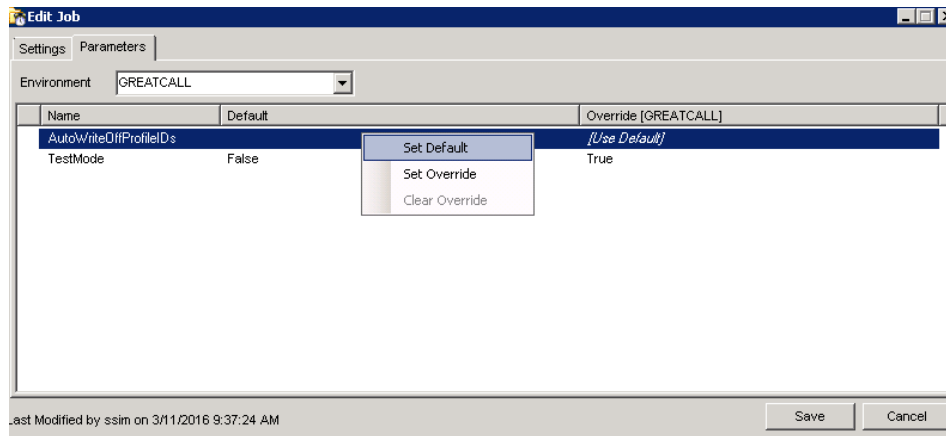
Note: Test mode does not actually complete the specified actions. Running a profile in run mode displays the same list and completes the specified actions. The results list can be exported to an Excel spreadsheet. You can also export the grid to a spreadsheet to view a selected customer.

Account Number	Customer Name	Disconnect Date	Bill Cycle	Account Status	New Account Status	Account Type	Collection Status	New Collection Status	Disconnect Reason
105963	JOAN KING	2/2/2016	Monthly 02	Disconnected/FINAL BILL	ZZ - DO NOT USE - Disco...	_Residential	Past Due 60 Day Letter Sent	Write-Off	NPD-Disconn...
131729	LOIS CHMURSKI	2/16/2016	Monthly 16	Disconnected/FINAL BILL	ZZ - DO NOT USE - Disco...	_Residential	Past Due 60 Day Letter Sent	Write-Off	NPD-Disconn...
169834	ROBERT H HEIMANN JR	2/11/2016	Monthly 26	Disconnected/FINAL BILL	ZZ - DO NOT USE - Disco...	_Residential	Past Due 60 Day Letter Sent	Write-Off	Customer De...
172065	ALEJANDRO PROSPER	2/2/2016	Monthly 02	Disconnected/FINAL BILL	ZZ - DO NOT USE - Disco...	_Residential	Past Due 60 Day Letter Sent	Write-Off	NPD-Disconn...
213268	PEGGY JENKINS	1/13/2016	Monthly 09	Disconnected/FINAL BILL	ZZ - DO NOT USE - Disco...	_Residential	Past Due 60 Day Letter Sent	Write-Off	Other - Sp...
239368	DAWNA WILLIAMS	1/4/2016	Monthly 02	Disconnected/FINAL BILL	ZZ - DO NOT USE - Disco...	_Residential	Past Due 60 Day Letter Sent	Write-Off	Other - Sp...
266451	SARA GIOVANNI	2/2/2016	Monthly 02	Disconnected/FINAL BILL	ZZ - DO NOT USE - Disco...	_Residential	Past Due 60 Day Letter Sent	Write-Off	NPD-Disconn...

Disconnect Reason	Days Past Due	Total Balance	W/O Adjustment Taxes - CR (12.67 %)	W/O Adjustment Usage - CR	W/O Adjustment MRC - CR (51.49 %)	W/O Adjustment Value Added Services - CR
Declined Recurring CC-CSR	109	515.08	(65.26)	(162.97)	(265.22)	(21.63)
NPD-Disconnect (Non-pay...	140	455.45	(57.71)	(144.10)	(234.51)	(19.13)
NPD-Disconnect (Non-pay...	105	449.26	(56.92)	(142.15)	(231.32)	(18.87)
NPD-Disconnect (Non-pay...	91	438.72	(55.59)	(138.81)	(225.89)	(18.43)
NPD-Disconnect (Non-pay...	107	436.29	(55.28)	(138.04)	(224.65)	(18.32)
Cost - Service-CSR	96	422.76	(53.58)	(133.76)	(217.68)	(17.76)
NPD-Disconnect (Non-pay...	110	408.55	(51.78)	(129.27)	(210.36)	(17.16)
NPD-Disconnect (Non-pay...			(51.64)	(128.96)	(209.87)	(17.12)
				(128.47)	(205.81)	
Total:			131254.42	(16629.87)	(41528.88)	(67583.09)
Showing 1330 rows						

Account Number	Customer Name	Disconnect Date	Bill Cycle	Account Status
2061599	JUDY STANDING CROW	12/23/2015	Monthly 03	Disconnected
1953969	JESSIE BRAY/BRAY	2/3/2016	Monthly 03	Disconnected
1084497	RENE	2/7/2016	Monthly 07	Disconnected
2138128	JEFF	2/21/2016	Monthly 21	Disconnected
2110731	LESLIE NUNIN	2/5/2016	Monthly 05	Disconnected
383429	FRAN DUPRAE	12/16/2015	Monthly 16	Disconnected
1488478	SHIRLEY SHUPE	2/2/2016	Monthly 02	Disconnected
2153593	TYESHA DAVIS	2/16/2016	Monthly 16	Disconnected
2144700		2/3/2016	Monthly 03	Disconnected
			Monthly 05	

Schedule Job – Setup



Settings Parameters

Environment: GREATCALL

Name	Default	Override [GREATCALL]
AutoWriteOffProfileIDs		[Use Default]
TestMode	False	True

Set Default
Set Override
Clear Override

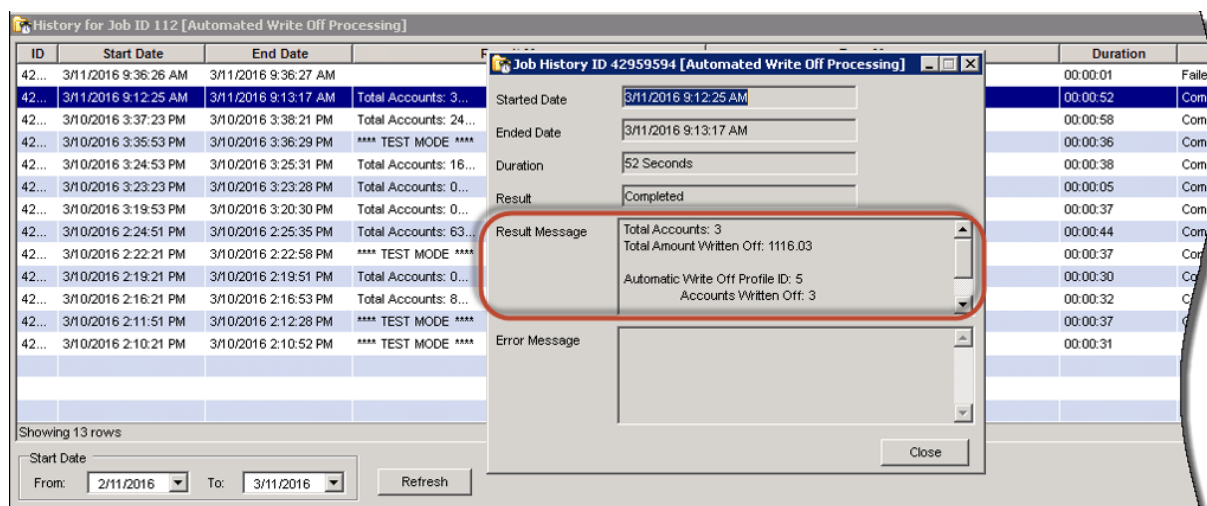
Last Modified by ssim on 3/11/2016 9:37:24 AM

Save Cancel

- **AutoWriteOffprofileIDs** – Comma-delimited list of profiles IDs.
- **TestMode** – Run the selected profiles in Run or Test mode.

Note: The scheduled job performs the write-off actions on the applicable accounts as specified in the selected profile. Test mode does not actually complete the specified actions.

Scheduled Job – Check Results



History for Job ID 112 [Automated Write Off Processing]

ID	Start Date	End Date	Duration	Result
42...	3/11/2016 9:36:26 AM	3/11/2016 9:36:27 AM	00:00:01	Failed
42...	3/11/2016 9:12:25 AM	3/11/2016 9:13:17 AM	00:00:52	Comple
42...	3/10/2016 3:37:23 PM	3/10/2016 3:38:21 PM	00:00:58	Comple
42...	3/10/2016 3:35:53 PM	3/10/2016 3:36:29 PM	00:00:36	Comple
42...	3/10/2016 3:24:53 PM	3/10/2016 3:25:31 PM	00:00:38	Comple
42...	3/10/2016 3:23:23 PM	3/10/2016 3:23:28 PM	00:00:05	Comple
42...	3/10/2016 3:19:53 PM	3/10/2016 3:20:30 PM	00:00:37	Comple
42...	3/10/2016 2:24:51 PM	3/10/2016 2:25:35 PM	00:00:44	Comple
42...	3/10/2016 2:22:21 PM	3/10/2016 2:22:58 PM	00:00:37	Comple
42...	3/10/2016 2:19:21 PM	3/10/2016 2:19:51 PM	00:00:30	Comple
42...	3/10/2016 2:16:21 PM	3/10/2016 2:16:53 PM	00:00:32	Comple
42...	3/10/2016 2:11:51 PM	3/10/2016 2:12:28 PM	00:00:37	Comple
42...	3/10/2016 2:10:21 PM	3/10/2016 2:10:52 PM	00:00:31	Comple

Showing 13 rows

Start Date: From: 2/11/2016 To: 3/11/2016 Refresh

Job History ID 42959594 [Automated Write Off Processing]

Started Date: 3/11/2016 9:12:25 AM

Ended Date: 3/11/2016 9:13:17 AM

Duration: 52 Seconds

Result: Completed

Result Message: Total Accounts: 3
Total Amount Written Off: 1116.03
Automatic Write Off Profile ID: 5
Accounts Written Off: 3

Error Message:

Close

You can view job results via the Scheduled Job History. The Result Message displays the following information:

- Total Number of accounts written off
- The total amount written off
- The profile(s) run
- The number of accounts written off per profile

AR 7045: Enhancements to Account State Handling

Business Need

With the original AR for Automated Clean Up on Accounts with Disconnected Services (6823), Future Activation services and Future Disconnect services were treated as active lines of service. As a result, two undesirable results could occur:

- **If Future Activation** = active, it moves SETUP accounts to Active before the service is activated.
- **If Future Disconnect** = active, it results in reverting a disconnected account back to Active.

New Functionality

Two new settings were added to the existing Account State Processing Rules form that allow users to:

- *Treat Future Disconnected Services as Disconnected* (when determining Account States).
- *Treat Future Activated Services as Not Yet Active* (when determining Account States).



Account State	New Account Status	Default Change Reason
Disconnected	Disconnected/FINAL BILL	Automated Clean-up Disconnect
Suspended	Active	Automated Clean-up Suspend
Hotlined	Hotline Due to Non-payment	Automated Clean-up Hotline
Active	Active	Automated Clean-up Active

Showing 4 rows

☐ Treat Future Disconnected Services as Disconnected

☐ Treat Future Activated Services as Not Yet Active

Account-Level Features

Determining Account State: Determine Active vs. Disconnected

Both check boxes are unselected by default. This supports current functionality, treating both Future Activation services and Future Disconnect services as Active lines of service.

Note: When evaluating the Account State, CostGuard will ignore services with a future activation date and set the Account State based on the state of all other services on the account, unless the resulting action would be to disconnect the account. In that case, CostGuard will leave the account in its current Status.

AR 7086: New Product Type Parameter to Require a Charge Override

Business Need

An IDI customer needed a solution that could complement its business process of negotiating 'price' (charge amount) rates for specific products per customer. A result of this business process is that the users needed to be able to override the configured charge amounts (defaults) for certain Catalog Items when creating an Order or Cart.

Attempts to use any existing out-of-the-box functionality resulted in users not performing the Charge Override to the appropriate amount. This resulted in billing errors and subscriber dissatisfaction.

The desired functionality is the ability to identify (using configuration) the specific catalog items that require a Charge Override. Then have the appropriate IDI applications enhanced to provide a method(s) that would clearly indicate that the item being added requires the user to confirm and override the displayed charge amount in order for that item to be added.

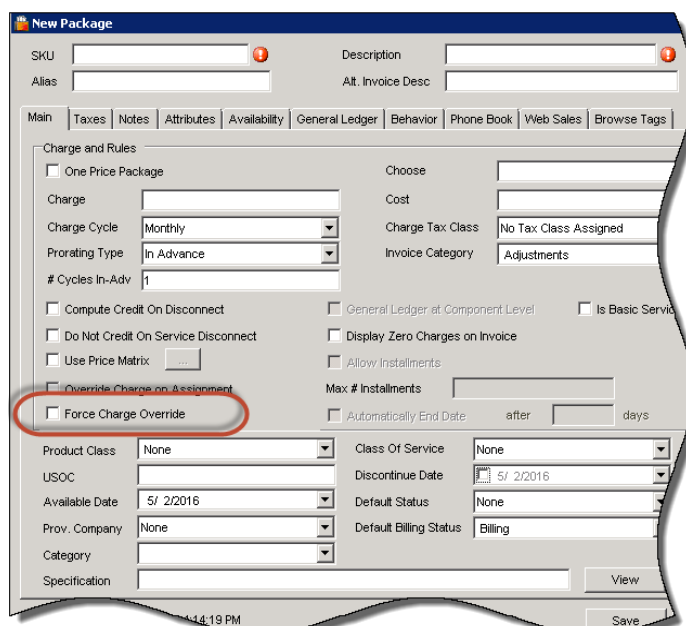
The benefits of the solution are an improved ease of use and a reduction in order-entry errors.

New Functionality

Configuration

Added a new checkbox, **Force Charge Override**, to the Main Tab of the following three Product Types:

- Billing Products
- Pricing Plans
- Packages



The new setting, **Force Charge Override**, is an optional checkbox that defaults to not being selected (unchecked).

- If enabled, the following parameters of the billing Product, Pricing Plan, or Package will be disabled (and vice versa):
 - 'Use Price Matrix'
 - 'Override Charge on Assignment'
- The new setting, when enabled, takes priority over the 'Override Charge' user permission.

Note: The solution is only applicable to Customer Management Orders and is not supported in POS.

Permissions

- This setting is available to all customers configured with Product Catalog access. No new settings were added.
- Existing permissions can be found here: **Application >CostGuard Client > Product Management > Product Catalog**.

Note: The system will allow a customer to access and perform the charge override even if the customer is configured to a permission that currently prevents him/her from doing a charge override. The permission in both the Admin Console and the Security Web Application is 'Override Charge'.

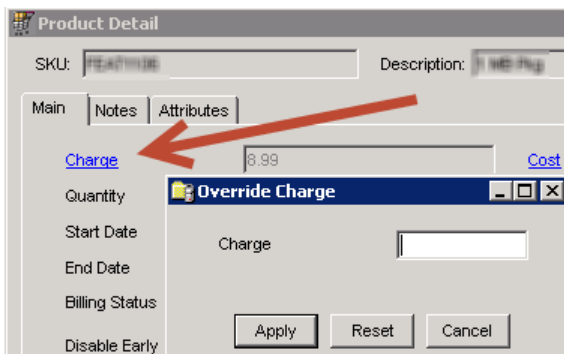
Setup

- When **Force Charge Override** is enabled (per the supported Product Types), the CostGuard Client – Customer Management Orders and IDI Orders Web application, prompts the user to review and 'override' the default charge value. Therefore, a user must acknowledge and perform the entry of charge value in order to continue.

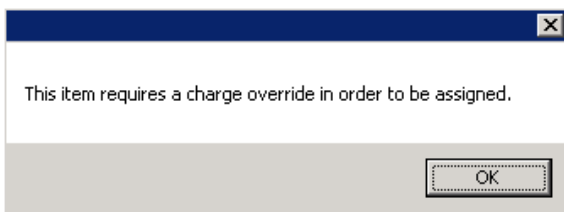
Note: Not modifying the configuration of an existing-applicable Catalog item, will result in no impact to existing functionality when assigning/adding the Catalog Item to an order/cart.

How it Works – CostGuard Client Order Creation Process

- **If the Catalog Item has the new setting Unchecked** - the introduced enhancement does not impact the current functionality of the system.
- **If the Catalog Item has the new setting Checked** - the customer must perform a Charge Override for the item when it is being 'Assigned' or 'Fast Assigned' to be added to the order. The system displays the detail form (window) of the Catalog Item with the following new functionality:



- You must select the existing **charge** link to display the existing 'Override Charge' window.
- Upon selection of the 'charge' link, the system displays the existing 'Override Charge' window for you to perform the entry of the desired charge amount.
- The solution will not allow you to assign/add the item until an override of the charge is performed. If you attempt to assign/add the item without performing the charge override, the solution will display a message when the 'Save' button on the detail window is selected:



When an applicable Catalog Item with *Force Charge Override* enabled is selected to be assigned from a presented listing for selection (e.g. Guided Service-Level Feature Assignment) within an applicable Customer Management Order, then the system displays that item's detail window when you select the *Next* button on the wizard page to perform the charge override.

When multiple items (with the new setting enabled) have been selected, the system displays a

How it Works – Web Services and the Orders Web Application

- *Catalog* and *Order Placement* Web Services were enhanced to support the new *Force Charge Override* parameter.
- When a billing Product, Pricing Plan, or Package, with the new setting, *Force Charge Override*, is enabled and added to a cart, the solution displays the existing *Edit..* (e.g., *Edit Feature*) details for the item being added.

The asterisk (*) next to the *Charge* field indicates that a value is required.

Services	SKU	Quantity	Charge	Start Date	End Date
Inventoried IP Voice - XXXXXXXXXX		1		05/04/2016	

Available Features

- Feature
 - VoIP Basic
 - VoIP Enhanced
- Plan
- Contract
- MRCs (exactly 1)

VoIP Basic

Edit Feature

Start Date: 05/04/2016

End Date:

Quantity: 1

Charge*:

SKU: 001AVOIP

USOC

Save Cancel

Feature X

- To add a billing Product, Pricing Plan, or Package, with the new setting enabled, the following must be performed:
 - You must enter a charge amount (e.g., perform the Charge Override) to add the item to the cart.
 - After entering the charge amount, select the 'Save' button to add the item.
 - If you attempt to add the item without performing the Charge Override, the solution prevents the item's addition and Indicates that a value is required by highlighting the field in yellow:

Charge*
 - Once added to the cart, the solution will display the charge amount in red font to indicate that the value was the result of a performed charge override.

Note: If the item being added is configured with other required fields (e.g., Attributes), the solution displays 'Edit..' before all other tabs.

Note: Similar to the CostGuard Client, the configuration of the item to require a charge override will supersede the Security permission, 'Override Charge'. This permission currently regulates if a user is allowed to edit (override) the charge of an item when added to a cart.

AR 7164: Support Barcode Scanning on Payment Form

Business Need

Scanning barcodes on invoices to reduce manual keying of account number information and reduce errors when using the Add Payment form.

New Functionality

Provides support for OPOS Scanning Events on Payment form.

- OPOS** - OLE for Retail POS, a platform specific implementation of UnifiedPOS, is a point of sale device standard for Microsoft Windows operating systems that was initiated by Microsoft, NCR, Epson, and Fujitsu-ICL and is managed by the Association for Retail Technology Standards.

Assumptions:

- Print vendor is responsible for providing properly formatted bar codes that are readable by the bar code reader.
- Customer is responsible for selecting a supported bar code reader (e.g., Symbol by Motorola Model: LS 2208).

How it Works

- OPOS scanning supported in all areas where users can display the Add Payment form:
 - Accounts Receivable Payment Search > New
 - POS Front Office > Tender Bill Payment
 - Customer Account > Tender Bill Payment
- When the form is open, regardless of which field has focus, users can scan the bar code on the invoice to populate the Account Number and Amount fields.

Note: When the form is opened on a customer's account, the Account Number is pre-populated with customer's account number. If Account Number represented in the bar code is different than the pre-populated Account Number, the system will display a warning that the bar code Account Number does not match the account number of the open account, and ask whether or not to use the bar code Account Number.

AR 7196: Added Deferred Payment Plan Dates to Collections Search Results

Business Need

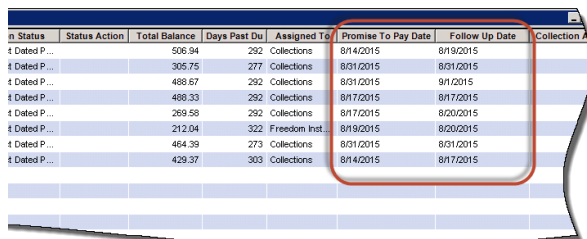
Facilitates managing deferred payment plans by saving users from having to open an account to find payment plan dates.

New Functionality

- Two new fields were added to the *Collections Search Results* for Deferred Payment Plans: **Promise To Pay** and **Follow-Up Date**.

Note: These fields replace Pre. Assigned To and Change Date fields, which were not being used.

- Only populated for subscribers whose Collection Status is Deferred Payment. Otherwise, the fields/columns will be left blank.



n Status	Status Action	Total Balance	Days Past Du	Assigned To	Promise To Pay Date	Follow Up Date	Collection A
† Dated P...		506.94	292	Collections	8/14/2015	8/19/2015	
† Dated P...		305.75	277	Collections	8/31/2015	8/31/2015	
† Dated P...		488.67	292	Collections	8/31/2015	9/1/2015	
† Dated P...		488.33	292	Collections	8/17/2015	8/17/2015	
† Dated P...		269.58	292	Collections	8/17/2015	8/20/2015	
† Dated P...		212.04	322	Freedom Inst.	8/19/2015	8/20/2015	
† Dated P...		464.39	273	Collections	8/31/2015	8/31/2015	
† Dated P...		429.37	303	Collections	8/14/2015	8/17/2015	

Note: If multiple promise to pay dates are defined the system displays the oldest promise to pay date of all deferred payments that have not been closed.

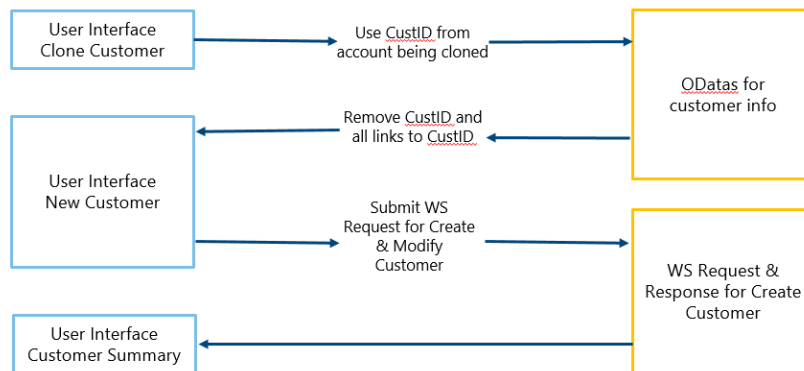
AR 7226: Add Copy/Paste Functionality for Corporate Accounts (Clone Customer)

Business Need

Added new functionality that provides a more effective way to duplicate customer data across accounts. Previously, customer service reps were rekeying customer information for large, corporate account structures. This process was tedious and prone to errors.

New Functionality

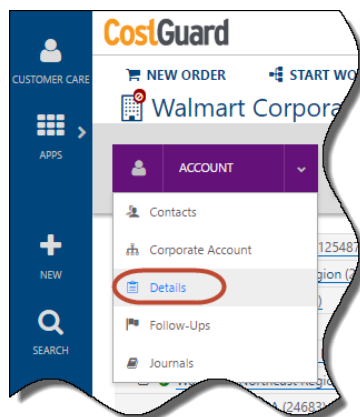
- This functionality is only available in Customer Care (web)
- Users with Manage Customers and/or Manage Prospects will be able to use clone functionality.
- No additional APIs were needed to support this feature



Navigation

Users can navigate to the functionality two ways:

- From the main menu, select **Account > Details**.

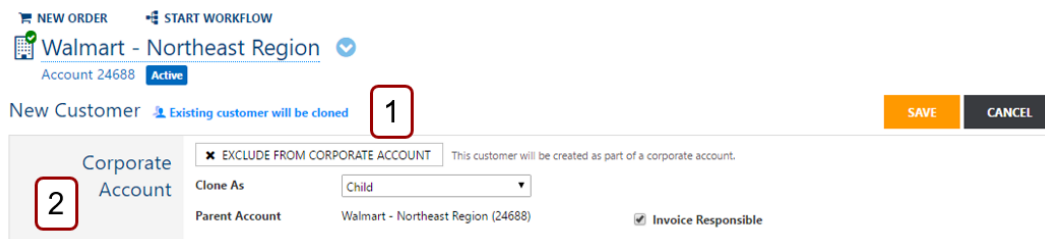


- From the Corporate Account page, hover over the row that you want to clone and click the clone icon.



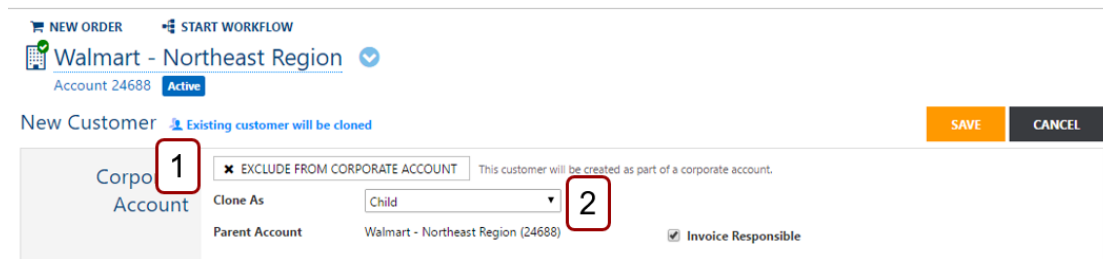
Functionality

- When you are cloning a customer, a message will be displayed next to the page title. Information about the original account that you are cloning from will be displayed above the page title.
- When you are cloning an account that is part of a corporate account structure, the Corporate Account section will be displayed so that you can make selections about how the cloned account should be added to the existing corporate account hierarchy.



Users can choose to exclude, or include the account, as part of the existing corporate account hierarchy.

- To exclude, click the 'Exclude from Corporate Account' button.
- To include, the user has several options.
 - By default, the system will select to add the cloned account as a child to the account you are cloning from.
 - Users can change the 'Clone As' option.
 - If cloning the root account, users can select to clone as Child or Other Parent
 - If cloning any other account within hierarchy, users can select to clone as Child, Sibling, or Other Parent



NEW ORDER START WORKFLOW

Walmart - Northeast Region Account 24688 Active

New Customer Existing customer will be cloned

Corporate Account

1 ☒ EXCLUDE FROM CORPORATE ACCOUNT This customer will be created as part of a corporate account.

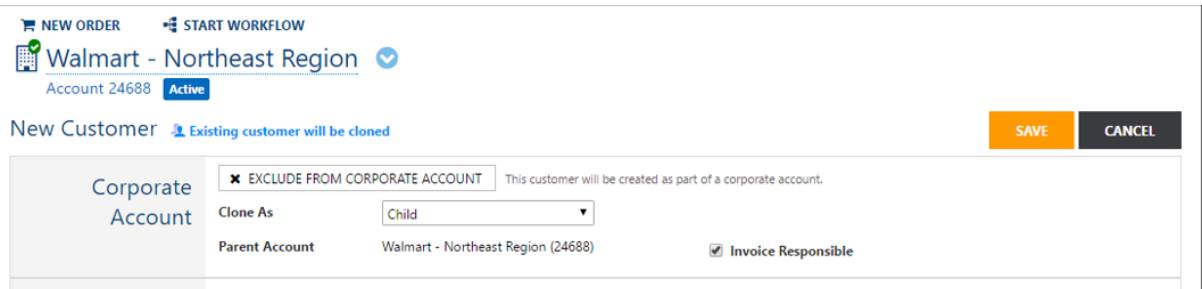
Clone As Child 2

Parent Account Walmart - Northeast Region (24688)

☒ Invoice Responsible

SAVE CANCEL

If the users select to clone a child or sibling, the system will determine the parent account and options for invoice responsibility.



NEW ORDER START WORKFLOW

Walmart - Northeast Region Account 24688 Active

New Customer Existing customer will be cloned

Corporate Account

☒ EXCLUDE FROM CORPORATE ACCOUNT This customer will be created as part of a corporate account.

Clone As Child

Parent Account Walmart - Northeast Region (24688)

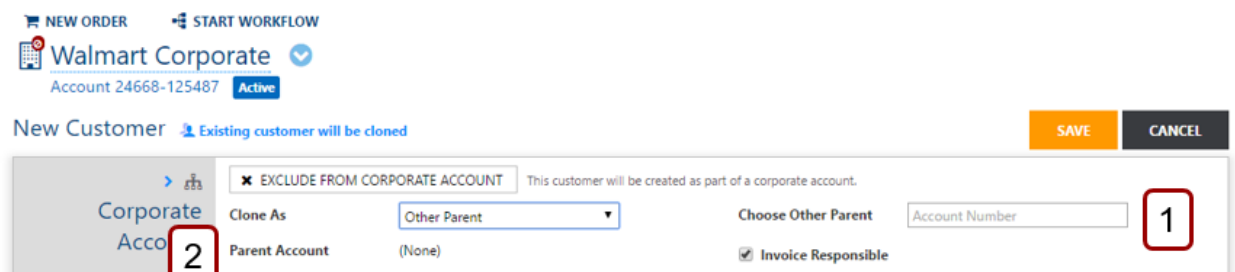
☒ Invoice Responsible

SAVE CANCEL

1 If the users select other parent for cloning, the system will display the 'Choose Other Parent' field. Users can type any part of the customer name or account number to select the parent account.

The parent account must be part of the existing corporate structure.

2 Once the parent account is selected the system will determine the option for invoice responsibility.



NEW ORDER START WORKFLOW

Walmart Corporate Account 24668-125487 Active

New Customer Existing customer will be cloned

Corporate Account

☒ EXCLUDE FROM CORPORATE ACCOUNT This customer will be created as part of a corporate account.

Clone As Other Parent

2

Parent Account (None)

Choose Other Parent Account Number 1

☒ Invoice Responsible

SAVE CANCEL

Based on how the user chooses to clone the account in the corporate account hierarchy, invoice responsibility will be displayed as editable or read only.

- If there are no invoice responsible accounts above the cloned account in the hierarchy, the system will default invoice responsibility to be invoice responsible in read only mode.
- If invoice responsible accounts existing above the cloned account, the system will default the invoice responsibility to invoice responsible and users will have the option to toggle this to non-invoice responsible.

NEW ORDER START WORKFLOW

Walmart - Northeast Region Account 24688 Active

New Customer Existing customer will be cloned

Corporate Account

☒ EXCLUDE FROM CORPORATE ACCOUNT This customer will be created as part of a corporate account.

Clone As Child

Parent Account Walmart - Northeast Region (24688)

☒ Invoice Responsible

SAVE CANCEL

The following customer information will be cloned:

- Basic
- Contact
- Billing
- Tax
- Credit
- Accessibility (formerly Entitlements)
- Additional Info (formerly Attributes)

Walmart Corporate Account 24668-125487 Active

New Customer Existing customer will be cloned

Corporate Account

☒ EXCLUDE FROM CORPORATE ACCOUNT This customer will be created as part of a corporate account.

Clone As Child

Parent Account Walmart Corporate (24668-125487)

☒ Invoice Responsible

Basic Information

Account Type* Employee

Account Status* Active

Account Number

Customer Name Walmart Corporate

Market* Market One Telecom

Sales Associate JCHA

State

Region

☒ CPNI Opt In

Contact Information

Primary Contact

First/Mi./Last Name Jenna Bender

Company Name

Address 701 SW 8th Streetz

City/State/ZIP* Bentonville AR 72716

Country USA

Validation Result Successful

Billing Contact

First/Mi./Last Name Jenna

Company Name

Address 701 SW 8th Street

City/State/ZIP* Bentonville

Country USA

Validation Result Successful

Phone Numbers

Work

+ ADD

VALIDATE NOW

AR 7264: Display CI from Raw CDRs into CostGuard

Business Need

A customer needed to know the location of their calls and since CostGuard did not show the cell location of the call, time and effort for that customer to research each call.

New Functionality

- To support this change, the wireless usage detail window has been changed to include the cell tower that serviced the call.

Usage Summary for Account Number: 100060034; Bill Period: 11120503

4/3/2012 - 7/2/2014 View Disclaimer: The current data in the table below may not reflect the most recent usage on this account.

Wireline Usage Wireless Usage Usage Type Summary

Charges

Service Number	Airtime Minutes	Roaming Minutes	Data	Messages	Airtime Charge	Roaming Charge	To
5153720011	2	0	0.000 GB	2	0.00	0.00	

Filter View Detail Data Unit Display Type

- From the detail window right click and select **Columns – All**

Wireless Usage Detail for Account Number: 100060034; Service

PeriodID	ServingPMN	LocationArea	CellSiteLookup	IsDiscounted	IsIncluded
310770	0		237,12C3	0	0
310770	0		237,12C3	0	0
310770	0		237,12C3	0	0
310770	0		237,12DF	0	0

- For a GSM customer, the CellSiteLookup field contains the LAC and Cell ID in hex, comma separated. (for a CDMA customer this will contain the CLLI).
- For CDRs without Cell site information, this column be blank.

AR 7279: Processing Recurring Gift Card Transactions

Business Need

This AR is required for scenarios where a carrier accepts Gift Cards for recurring payments but their payment gateway does not allow this (currently only an issue for Vantiv).

New Functionality

A new database table, `PaymentProcessingType`, allows carriers to set up a different Bank Processing Type for each of the card types they accept (for example, use *Recurring* for Credit/Debit and *Telephone* for Pre-paid).

Bank Processing Type is a new parameter passed to all payment gateways, but only used by Vantiv. If the table is populated, the system displays a new drop down menu on the Add/Edit Credit Card Account form in E-Pay. This new drop down allows the user to select the card type for the new credit card account.

Under the hood, the system will pass the Bank Processing Type as specified for the card type. This way carriers can submit transactions using Pre-paid or Gift cards as something other than recurring so that they are not rejected by the payment gateway.

Note: The menu will not be displayed if the table is empty as most customers will not want to use this functionality. Payments for recurring payments were previously unable to be distinguished from one another.

AR 7280: Deployment of the Acme Reports Solution

Business Need

A customer needed 3 new reports created to support their business.

New Functionality

This solution is available for use in Job Schedule Management upon upgrading to the noted version/release of the CostGuard solution and kit.

The installer must ensure the value for KeyName "EnableAcmeGlobalExports" in the ConfigurationValue table is "True" for the reporting solution to be available. A successful installation results in these 3 jobs being added to the listing within the CG Master Service:

- Acme Global Inventory Export
- Acme Global Sell Through Export
- Acme Global Sell Transfer Export

Note: The jobs default to being disabled.

In order to run a report in accordance with the customer's business requirements, a permissioned and properly trained user must first address the following:

- Configure the parameters (specific to the customer) on the CG Master Service. These values apply to all 3 of the new Acme jobs.
- Configure the parameters (specific to the customer) for each specific job, if applicable.

AR 7306: Added Invoice Number to CostGuard Payment File/Batch Processing

Business Need

A customer's bank did not include the account number in their payment (lockbox) file (but did include the invoice number).

Because the account number was missing, when CostGuard processed the file, the payment was not being applied and the customer had to manually enter the payments.

New Functionality

When processing each payment, if the account number from the payment file is blank or not found, then use the invoice number to lookup the account.

AR 7307: Required Approved Debit Taxation Field for One-Time Credits

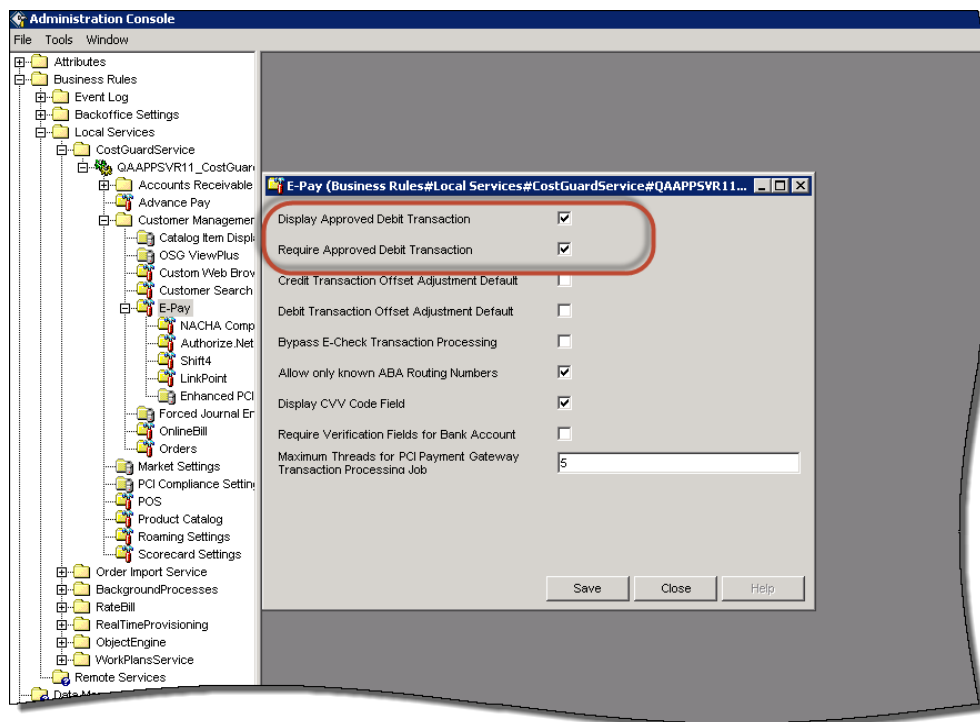
Business Need

Admin Console has a setting that controls the display of the *Approved Debit Txn* field when making a one-time credit to an E-Pay bank or charge account. The name implies that it forces the user to select an approved debit transaction, however, it does not.

New Functionality

- Renamed original setting to properly indicate it controls whether or not to display field (previously named *Force Approved Debit Transaction*)
- Added new setting to control whether to require users to select an Approved Debit Transaction on making a one-time credit to an E-Pay bank or charge account.
- When the new, require setting is enabled and error message is displayed when attempting to complete a one-time credit without selecting an Approved Debit transaction.

Setup



- In Business Rules > Local Services > CostGuard Service > Customer Management > E-Pay, enable the setting: **Require Approved Debit Transaction**.

Note: If the new setting is enabled, the Approved Debit Txn field is displayed regardless of the original setting.

New Message

