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Customer Master 20.2 Update Letter

Enhancements have been made to the Customer Master software application. Please take time to review these changes, which become effective with Version 20.2 of Customer Master.

This section of Client Central provides an overview of the changes made and added functionality included in the latest version of the software. Click on the Modules listed below in the table of contents for complete details. Each page refers to the changes by Module, followed by a brief summary of the enhancements included in that Module.

Customer Master's online help has also been updated to include information on the latest enhancements. Please refer to the help documentation for an in-depth explanation of the enhancements included in this letter or contact your MACC Customer Master Software Support Representative. Web training sessions on these enhancements are also available.

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Delinquents

No Penalty Option for Delinquents

A new “No Penalty” option is now available for delinquent accounts, so users have the ability to send a late notice to an account, but keep the account from getting a penalty. An Expire Date, Alert, and reports are available for accounts flagged No Penalty.

A No Penalty check box was added to the Credit Node of the Service Order, with a corresponding Expire Date drop-down calendar. When checked, the account can receive a delinquent notice, but will not get a late fee during the Penalties process. The Expire Date can be set to limit the amount of time the account is exempt from penalties.

Click on images for a larger version

The screenshot shows a form with several fields. A red box highlights the 'No Penalty' checkbox, which is checked, and the 'Expire Date' dropdown menu, which is set to '08/01/2020'. Other visible fields include 'Pull Bill' (unchecked), 'Code' (dropdown), 'End Bill Date' (dropdown), and 'No Notice' (unchecked).

A No Penalty Alert is available for both Inquiry and Payments at Maintenance | Common | Alerts, and will display in the Alerts window for any accounts flagged No Penalty.

Alerts	Tier
CPNI Non-Approval	Account
Security Deposit	Account
Potential Outage - TELEPHONE OI	(319) 555-1031
No Penalty	Account

The Non-Zero Balance Report found in the report's menu of the Delinquent process, contains a new No Penalty column to aid in identifying No Penalty accounts.

All Rpt Areas		Non Zero Balance Report, List Name 02/01/2020 FINAL						Page 1 of 1			
CO # : 470		Run Date 3/3/2020, Bill Cycle 01, Bill Date 2/1/2020						6/3/2020 8:57:50 AM			
OCN # : 470a		SUCCESS TEL PRODUCTION 19P 190T						sklich			
Account Name	Account Number	Main Number	Status	Credit Class	Previous Balance	Last Bill Amount	Payments	OCC Adjustment	Past Due	No Notice	No Penalty
ACME CORPORATION	1510	VID5551255	DNP	B	1,038.93	0.00	0.00	0.00	1,038.93	N	N
EMILY ANDERSEN	1502	(319) 555-1126		B	106.06	54.05	0.00	0.00	54.41	N	N

The Credit Attributes report, and the Grid Report - Account can be used to discover accounts flagged as No Penalty. The Credit Attributes report has a new group box for No Penalty Options, and the Grid Report - Account includes No Penalty, and No Penalty Expire Date selections

No Penalty Options

Do Not Filter

No Penalty Accounts

Non-No Penalty Accounts

No Penalty

No Penalty Expire Date

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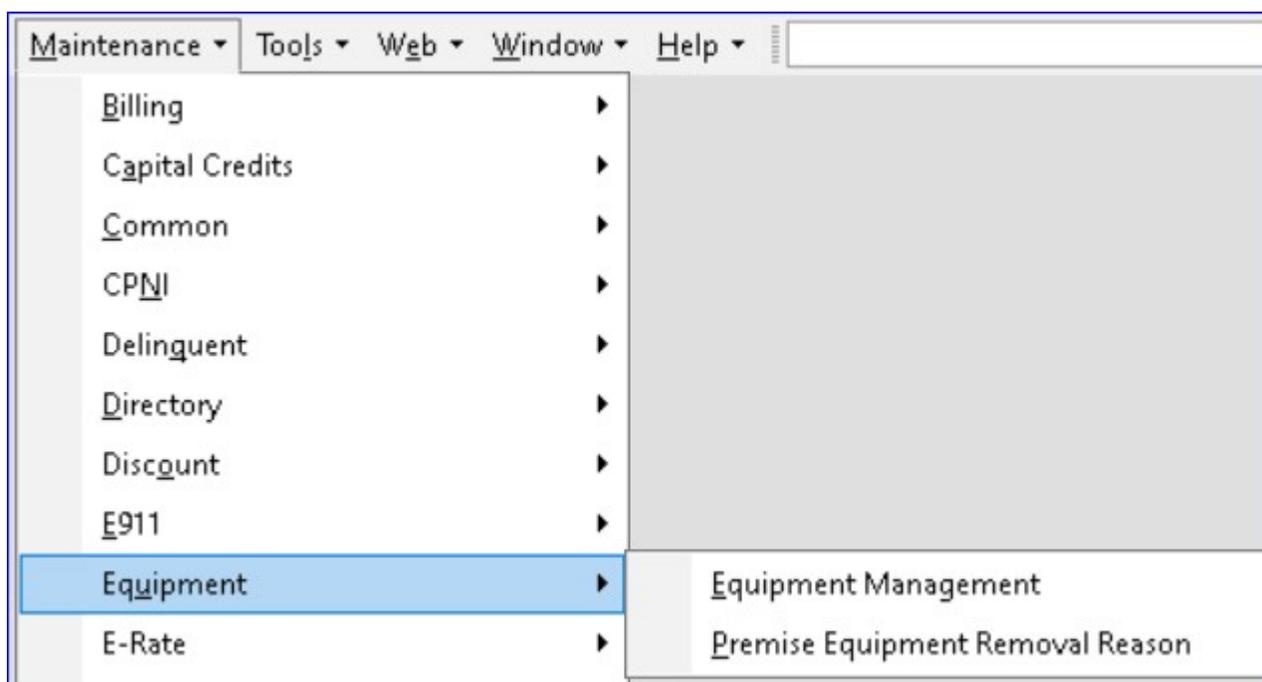
Maintenance

A New Premise Equipment Interface

MACC's new Premise Equipment interface provides versatility in managing premise equipment to the customer's address from one application, our Customer Master software. This comprehensive and time saving interface allows users to assign/store equipment on network addresses, pull equipment items directly from Accounting Master inventory, and provision the equipment (activate or change service) with their equipment vendor. This eliminates dual entry in multiple software's, providing a seamless equipment process within Customer Master. Users who do not have the Accounting Master Inventory interface will also be able to assign/store CM Equipment as Premise Equipment on addresses in Customer Master. Note: If your company plans to use Premise Equipment, and you plan to auto-provision that equipment, please contact your Client Relations Manager or Account Manager to coordinate with MACC's Application Interface team. Set up will be required.

The Equipment menu has been moved from the Maintenance | Service Order menu, to its own menu item at Maintenance | Equipment | Equipment Management.

Click on each image for a larger version



A new Premise Equipment Removal Reason has been added to the Equipment menu, and is the table to set up and store removal reasons for Premise Equipment. When deleting CM Premise Equipment, users will be required to enter a reason for the removal.

Premise Equipment Removal Reason

Code	Description	Changed By	Changed Date
RECALL	VENDOR RECALL	sklich	8/26/2020 11:30:58 AM
RTNFAIL	RETURN FAILURE	sklich	8/26/2020 11:31:39 AM
RTNSERV	RETURN SERVICEABLE	sklich	8/26/2020 11:32:10 AM

Premise Equipment Removal Reason

Code: Inactive

Description:

In the Equipment Management's Model Editor, two new check boxes were added to flag the manufacturer/model for SO Equipment, and/or Premise Equipment. Flagging SO (Service Order) Equipment allows users to add that Equipment under the Equipment node of a network tier in a Service Order. Flagging Premise Equipment sets the Manufacturer and the Model as able to be provisioned, and allows you to add equipment under the plant node of a network tier in a Service Order.

A Premise Equipment tab has been added to the Address Editor, with ability to manage and assign both CM Equipment, and AM Inventory Equipment to a service (network) address. This equipment is leased equipment only, with no POS transaction information. This table can also store CM Equipment as Premise Equipment for companies that do not use the Accounting Master Inventory interface.

The toolbar buttons include functionality to Insert, Delete, Edit, Refresh, Filter active/inactive, Reports (Equipment Listing,) Return AM Inventory, Assign Addresses (multiple,) and add Comments. The grid can display both AM Inventory equipment, and CM Equipment with applicable rows/columns to show the equipment information. Right clicking on the grid allows the export of the grid for reporting purposes.

Address Editor

Type: Acct/Cust Network

Address 1: 100 ADMIRAL DR

Address 2: 01

City: BLAIR State: NE

ZIP: 68008 ZIP +4: Inactive Address

Delivery Point: Check Digit: Scrubbed

Zone:

Send to GPS Interface

Latitude: 41.540657863970353

Longitude: -96.111478141102566

Census Tract: 311770501.02 + Block: 3172

SAC:

Plant Key:

Auto-Assigned Values | Serving Equipment | **Premise Equipment** | Servicing Terminals | E911 | Internet Deployment | Comments

Equipment Source	Equipment Type	Manufacturer	Model	Qty	Equipment ID	Serial Number	Description	Provision	Effective Date	End Date	Issue/Return	Attributes	Changed By	Changed Date	Transaction ID	Transaction Return ID	Work Order Number
AM Inventory				1	ONT-FIOS Fiber		ONT FIOS Fiber Optic	<input type="checkbox"/>	9/1/2020		1	<input type="checkbox"/>	sklich	9/1/2020 9:03:21 AM	10023		
CM Equipment	ONT	CALIX	765G	1				<input type="checkbox"/>	9/1/2020			<input checked="" type="checkbox"/>	sklich	9/1/2020 8:49:15 AM			
CM Equipment	CABLE MODEM	DSL MODEM	DSL MODEM	1				<input checked="" type="checkbox"/>	9/1/2020			<input checked="" type="checkbox"/>	sklich	9/1/2020 10:16:51 AM			

If your company utilizes the Inventory Interface Option at Tools | Options | Inventory (Nii,) the Insert button has dual functionality to add both CM Premise Equipment (CM Prem Equip) and AM Premise Inventory (AM Prem Inv.) If not, clicking insert will take users directly to the CM Premise Equipment Editor for the selected address.

Auto-Assigned Values | Serving Equipment | Premise Equipment



CM Prem Equip
AM Prem Inv

Manufacturer	Model

AM Inventory