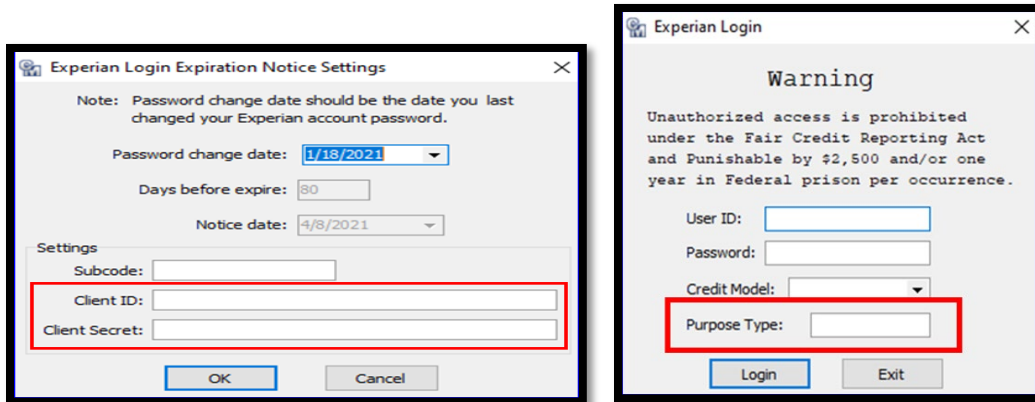


**What's New in CM 21.1**  
**Pop-Up Training**  
**6/15/2021-6/17/2021**

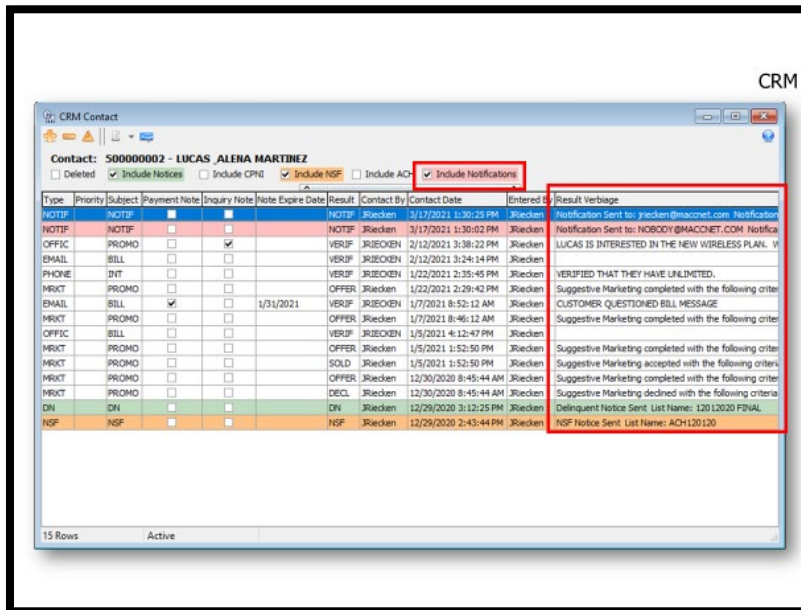
**Credit Bureau Interface with Experian**

- Updating Interface to API Hub
  - Requires updated documentation with Experian to obtain Client ID and Client Secret
  - Update in late 20.2 to utilize Purpose Code



**CRM grid**

- Result Verbiage add. First 254 character are displayed as well as HTML and Notifications.



**Capital Credits**

- MISC 7 has been updated to NEC 1 in accordance with the IRS changes.

**E911**

- Pre and Post Directions of EW and NS have been added.

## Emergency Broadband Benefit Program

- Emergency Broadband Benefit Program has been added to Customer Master. Similar structure and functionality as NLAD. New EBBP grid report added.

Emergency Broadband Benefits Program

Subscriber ID: SAC: 890123 Sent Date: Transaction Type: enroll Transaction Date: 6/3/2021 Service Type: DSL Initialization Date: 6/3/2021 Expected Rate: 50

First Name: ANITA Last Name: LOWE DOB: 2/13/1995 Certification: [checked] Tribal Benefit: [unchecked] Tribal ID: Phone # in EBBP: Consumer Email: USAC Rep: Alternative Verification Process Exception: [unchecked] Eligible Program: School: District Name: BLAIR Lunch Certification: [unchecked] Lunch Exception: [checked] Device: Reimbursement Date: 6/3/2021 Type: Laptop Make/Model: DELL Expected Rate: 100

AMS Failure Exception: [unchecked] Latitude: Longitude: View Subscriber Primary (Network) Address: View Subscriber Mailing (Account) Address: Address 1: 2003 NEBRASKA ST Address 2: City: BLAIR State: NE Zip: 68008

## Inquiry

- Auto Expand Customer Threshold
  - Auto Expand Feature will not apply if customer count is greater than threshold.
- Search by Contact Number
  - Will now expand the tiers of the account when the auto-expand tiers checkbox is checked.

Inquiry

Search

Acct #: Network #: Status: All Net Type: All Misc Options: Cap Cred #: Equipment Options: ID: Attribute: Value: Auto Expand Tiers: [checked] Customer Threshold: 5 Suppress Discon Tiers: 90

Account: 50000010 - MOUNTAIN ENTERPRISES

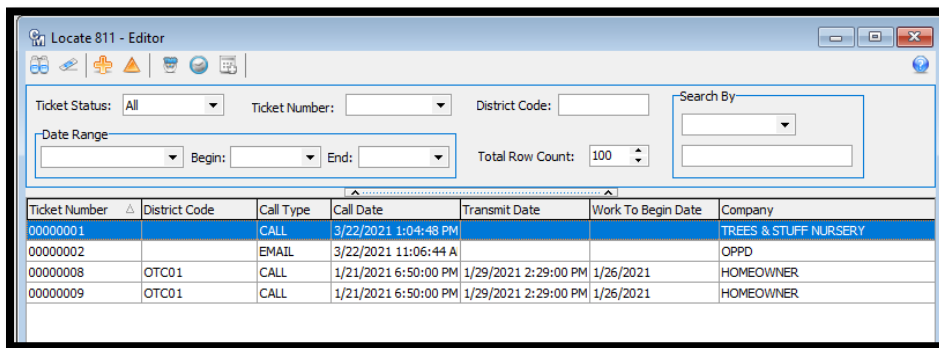
Tier	Status	Active	Inactive	Bus/Res	Report Area	Tax Area	Svc Area	Net Desc	Svc Ty
MOUNTAIN ENTERPRISES				B	ACCT	ARL	ARL		
MOUNTAIN GROCERY				B	ACCT	ARL	ARL		
(319) 555-1003				B	TEL	ARL	ARL	MOUNTAIN GROCERY - 2ND LINE	B1
(319) 555-1004				B	TEL	ARL	ARL	MOUNTAIN GROCERY	B1
(319) 555-6040				B	CELL	ARL	ARL	MOUNTAIN GROCERY	
VID0012				B	VID	ARL	ARL	MOUNTAIN GROCERY	
MOUNTAIN GROCERY-LOTTERY & KENO				B	ACCT	ARL	ARL		
ETH-0001				B	SPC	ARL	ARL	MOUNTAIN GROCERY-LOTTERY & KENO	ETH
INT0012				B	INT	ARL	ARL	MOUNTAIN GROCERY-LOTTERY & KENO	INT
SEC0001				B	SEC	ARL	ARL	MOUNTAIN GROCERY-LOTTERY & KENO	
MOUNTAIN SUPPLY SERVICES				B	ACCT	ARL	ARL		

## Lifeline

- Phone # in NLAD field not required when Broadband Only (BO) is selected for an enroll. It is required for other transactions type of de enroll or change.

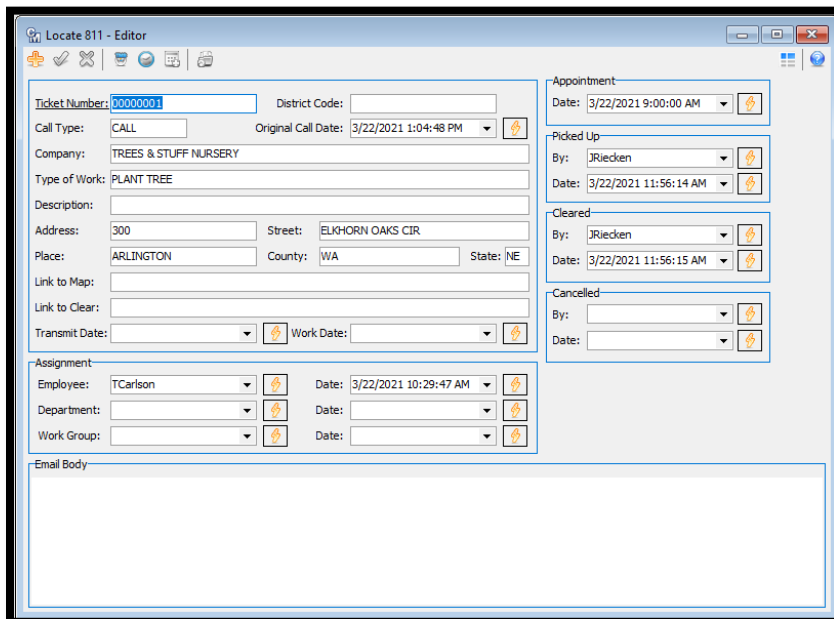
## Locate

- New module to store, create, search, schedule your locate (811) tickets from your stare vendor.
  - Advanced Scheduler can be used to schedule tickets with your technicians.
  - Notifications can be sent out.
  - Optional Timed Service can monitor your 811 Locate emails to screen scrap emails to load the ticket information.
  - Current API to clear tickets works with states of Washington, Oregon, Idaho, and Hawaii.



The screenshot shows the 'Locate 811 - Editor' application window. At the top, there are search filters: Ticket Status (All), Ticket Number, District Code, and Search By. Below these are Date Range filters (Begin, End) and a Total Row Count of 100. The main area contains a table with the following data:

Ticket Number	District Code	Call Type	Call Date	Transmit Date	Work To Begin Date	Company
00000001		CALL	3/22/2021 1:04:48 PM			TREES & STUFF NURSERY
00000002		EMAIL	3/22/2021 11:06:44 A			OPPD
00000008	OTC01	CALL	1/21/2021 6:50:00 PM	1/29/2021 2:29:00 PM	1/26/2021	HOMEOWNER
00000009	OTC01	CALL	1/21/2021 6:50:00 PM	1/29/2021 2:29:00 PM	1/26/2021	HOMEOWNER



The screenshot shows the 'Locate 811 - Editor' application window with a detailed ticket edit form. The form includes the following fields and sections:

- Ticket Information:** Ticket Number (00000001), District Code, Call Type (CALL), Original Call Date (3/22/2021 1:04:48 PM), Company (TREES & STUFF NURSERY), Type of Work (PLANT TREE), Description, Address (300), Street (ELKHORN OAKS CIR), Place (ARLINGTON), County (WA), State (NE).
- Appointment:** Date (3/22/2021 9:00:00 AM).
- Picked Up:** By (JRiecken), Date (3/22/2021 11:56:14 AM).
- Cleared:** By (JRiecken), Date (3/22/2021 11:56:15 AM).
- Cancelled:** By, Date.
- Assignment:** Employee (TCarlson), Date (3/22/2021 10:29:47 AM), Department, Work Group.
- Email Body:** A large text area for entering email content.

## Television Viewer Protection Act

- Print Contract Info checkbox on Contracts. Contracts print in Account Level of the Bill.
- Print Promotion Info checkbox on USP codes and Bundles. Promotions will print within the tier of Account where they reside.

## Nii- Network Inventory Interface

- Updated to Utilize more than one Accounting Master Materials Company.
  - Dropdown selectors on screens and columns added to grids and reports to display the Materials Company.

## Receivables

- Payment Batch Names by Payment Method
  - Maintance | Common | Employee- new additional payment batch names can be set up for each payment method. .
  - When poritng payments, CM will automatically update the batch name when the payment method is changed.

Employee Editor

ID: JRJECKEN

First Name: Julie Middle Name:

Last Name: Riecken Full Name: Julie Riecken

Net Login: JRiecken Designation:

Automatically Suggestive Market USAC Rep ID:

Automatically Open Account Overview Inactive

General Info | **Payment Defaults** | Contacts | Department | Work Group | Permissions

Default Payment Method: Check  Allow Cancel Payment Arrangement

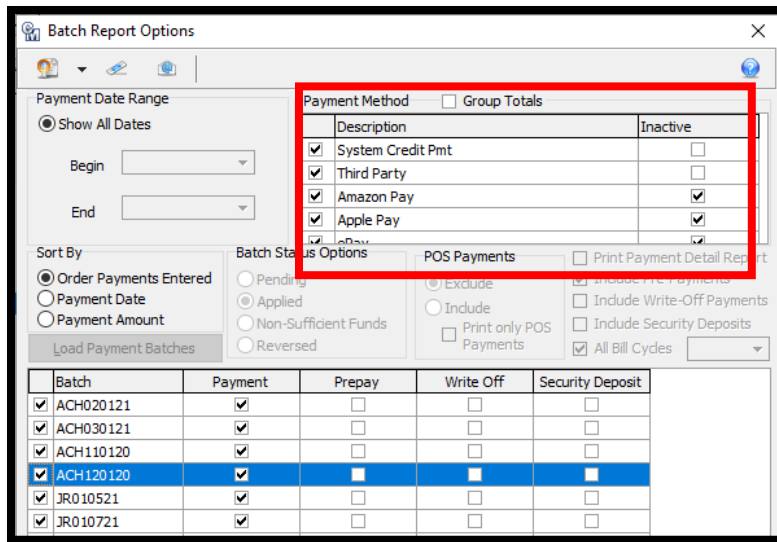
Pay Method Check Requires Check Number  Money Order Requires Payment Number

Allow Apply Pending Payments for a Single Date

Prompt for Auto-Reconnect feature on Payment Entry screens

Pay Method	Monthly (MM)	Day (DD)	Year (YY)	Year (YYYY)	Update Other	Other	Sample	Batch Name	Clear
(Default)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	JR	040121JR	[%MM%][%DD%][%YY%][%JR%]	<input type="checkbox"/>
Credit Card	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	JRCC	040121JRCC	[%MM%][%DD%][%YY%][%JRCC%]	<input type="checkbox"/>
Money Orde	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	JRMO	040121JRMO	[%MM%][%DD%][%YY%][%JRMO%]	<input checked="" type="checkbox"/>

- Additional Payment Options for Tracking Purposes
  - Amazon Pay, Apple Pay, Google Pay, Manual Third Party, PayPal, PayPal Credit and Venmo have been added to CM. But please note, these need to be turned on by your SSR and do not interface with that vendor at this time.
- Batch Report updated to include additional Payment Methods
  - Grid added to the report, instead of the checkboxes.



- Hide Printed By field on 3x6 receipt
  - New Hide Printed By on 3 x 6 receipt added to the Receipt Designer screen.

## Reports

- New Premise Equipment Use report
  - Like Equipment Use report but displays the Premise Equipment tied to the addresses.
- Trouble Ticket by Stage
  - Elapsed Times added to the report for Assigned to Started, Started to Completed and Assigned to Completed analytics.
  - Option to print Trouble Comments.
- Performance Measures
  - CAF-II, ACAM, CAF BLS, RBE, and Alaska Plan companies can create Performance Measures file of the active broadband accounts that have addresses reported on past HUBB reports.
- Reassigned Numbers Database
  - New FCC requirement to send permanently disconnected line numbers each month. Seed File = initial file from Jan 27, 2021 to date of your first file. Monthly files after that.
  - Sign up on [www.reassigned.us](http://www.reassigned.us) website.

## Scheduler

- Ability to assign employee to multiple work group has been added.
- Ability to schedule employee over 24-hour day has been updated. Warning messages appear if appointment is outside their normal work hours.
- Updates made to the Schedule Appointment screen to display the employees assigned to each work group and all their appointments for that day. Calendar will only show the employee once with all appointments.
- Ability to right click and Expand All or Collapse All to display the work groups and employees from the Schedule Appointments screen.
- If work group is populated on the account, then SO, SL, TT will default Work Group in the Scheduled Appointments screen for you.
- Employee Work Week and Inbox have been updated to display employees assigned to multiple work groups, as well as the Schedule Recurring Appointments, Adjust Employee Hours, and Move Employee tools. Employee Listing report updated to display the multiple work groups that an employee can be assigned to.

- New options to allow update on past appointments, notify entering party on change or delete of appointments and Prompt for Deleting Future Appointments when Sales Leads are Accepted, Service Orders are Trouble Ticket Clear and Stage Complete on SO, SL and TT.
- Enterprise Scheduler
  - If company with multiple databases is utilizing Enterprise Inquiry, then Enterprise Scheduler is available and eliminated dual entry of the employee's schedule if they work in multiple databases.

## Taxes

- MACC is interfacing with Avalara to automate tax generation for all billed services.
  - Some setup required and OCCs will no longer generate taxes in Customer Master.
  - Contact your Client Relations Manager or Account Manager for Avalara contacts to discuss this interface.

## Trouble

- New option in the File|Preferences|Trouble Preferences to copy the Trouble Description to Trouble Comments.
- Trouble Mass Outage will only generate one notification per account, if the account has multiple networks affects by the outage.

Selected	Network Type	Network Number	Open Ticket	Account Number	Customer Number	Name
<input type="checkbox"/>	Telephone	3195551005	<input checked="" type="checkbox"/>	500000001	1	JAMES & JENNIFER SMITH
<input type="checkbox"/>	Telephone	3195551010	<input type="checkbox"/>	500000002	2	LUCAS & ALENA MARTINEZ
<input type="checkbox"/>	Telephone	3195551011	<input type="checkbox"/>	500000003	3	STEVEN THOMAS
<input type="checkbox"/>	Telephone	3195551051	<input checked="" type="checkbox"/>	500000004	4	RANDALL'S ANIMAL HOSPITAL
<input type="checkbox"/>	Telephone	3195551100	<input type="checkbox"/>	500000005	5	MOUNTAIN VALLEY PUBLIC SCHOOLS
<input type="checkbox"/>	Telephone	3195551101	<input type="checkbox"/>	500000005	5	MOUNTAIN VALLEY PUBLIC SCHOOLS
<input type="checkbox"/>	Telephone	3195551110	<input type="checkbox"/>	500000005	35	MOUNTAIN VALLEY PUBLIC SCHOOLS
<input type="checkbox"/>	Telephone	3195551111	<input type="checkbox"/>	500000005	35	MOUNTAIN VALLEY PUBLIC SCHOOLS
<input type="checkbox"/>	Telephone	3195551500	<input type="checkbox"/>	500000006	6	ARLINGTON LAW OFFICES
<input type="checkbox"/>	Telephone	3195551003	<input type="checkbox"/>	500000010	10	MOUNTAIN ENTERPRISES
<input type="checkbox"/>	Telephone	3195551004	<input type="checkbox"/>	500000010	10	MOUNTAIN ENTERPRISES
<input type="checkbox"/>	Telephone	3195558000	<input type="checkbox"/>	500000010	38	MOUNTAIN ENTERPRISES
<input type="checkbox"/>	Telephone	3195558001	<input type="checkbox"/>	500000010	38	MOUNTAIN ENTERPRISES
<input type="checkbox"/>	Telephone	3195558002	<input type="checkbox"/>	500000010	38	MOUNTAIN ENTERPRISES
<input type="checkbox"/>	Telephone	3195558003	<input type="checkbox"/>	500000010	38	MOUNTAIN ENTERPRISES
<input type="checkbox"/>	Telephone	3195558004	<input type="checkbox"/>	500000010	38	MOUNTAIN ENTERPRISES
<input type="checkbox"/>	Telephone	3195558005	<input type="checkbox"/>	500000010	38	MOUNTAIN ENTERPRISES
<input type="checkbox"/>	Telephone	3195551020	<input type="checkbox"/>	500000011	12	SHEAR CUTS SALON
<input type="checkbox"/>	Telephone	3195551070	<input type="checkbox"/>	500000012	13	OLIVER GARCIA
<input type="checkbox"/>	Telephone	3195551008	<input type="checkbox"/>	500000014	15	BRUCE & KARLA ANDERSON
<input type="checkbox"/>	Telephone	3195551025	<input type="checkbox"/>	500000015	16	BEN RODRIGUEZ

## MACC Mobile

- Ability to add new account through service order has been added. After Posting Customer tier can be added, then Network Tier and additional details of the Network, like USP codes and etc.
- Trouble Ticket Comments can be quickly accessed from the Trouble Detail section.
- Locates were added to MACC Mobile.
- Signatures have been updated by allowing users to click the Additional button and the Signature Attachment Location window will pop-up.
- Scheduler allows to delete future appointments when prompted. Notes associated with the scheduler will display in the extra panel.

- MACC Mobile was updated to accommodate employees being assigned to multiple work groups with the Inbox, Time Entry and Scheduler.
- Network Inventory Interface was update to select the material company from the dropdown.
- Users can view Alerts, Inquiry Notes, and Diving Directions from Service Order, Sales Lead and Trouble detail screens.