



# Customer Master 23.1 Update Letter

# Avalara Taxes 23.1

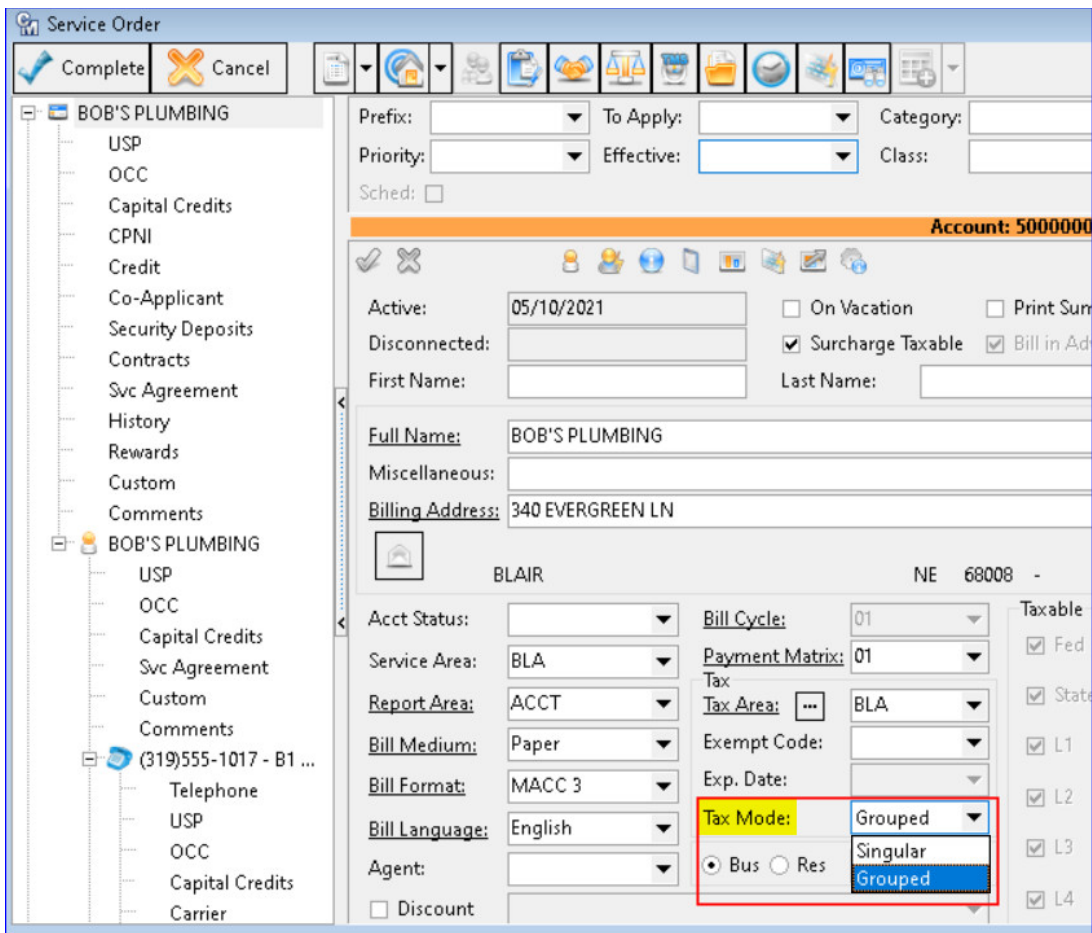
## Avalara Tax Mode Added to Tiers

For companies partnered with Avalara for their tax calculations a Tax Mode option was added on every tier within the Service Order. Having the Tax Mode setting in place on each tier will ensure tax calculations bill in accordance with Avalara's expectations.

**Service Order – Account, Customer, and Network tiers:** A "Tax Mode" drop-down box was added in the Tax group box on each tier (Account, Customer, and Network.) Tax Mode is only visible if Avalara is activated in the database. There are two options available for selection from the drop-down.

- **Grouped:** Indicates the Tax is capped, so after a given line count or sale amount, no additional tax is charged on the amount over the cap. The default is set to Grouped for all tiers
- **Singular:** Indicates the tax does not apply until the threshold is crossed. After a given line count or sale amount, tax is then charged on the amount above the threshold.

**Note:** Avalara determines which tiers should be grouped or singular and users should set the option according to Avalara's direction.



**Report Suite | Processing | Reports | Billing | Taxability Status:** A column labeled "Tax/Invoice Mode" was added to the Taxability Status report and will display the "Grouped" or "Singular" setting on account, customer, and network tiers. This will only be present when Avalara is activated.

All Rpt Areas		Taxability Status Report			Page 23 of 32	
CO # : 500		All Tax Areas, All Tiers, All Statuses, All Exempt Codes			1/18/2023 11:08:56 AM	
OCN # : 55555		MOUNTAIN VALLEY COMMUNICATIONS PROD 22.1			sklich	
Tier Type	Tier Number	Account No	Account Name	Exempt Code	Exp. Date	Tax/Invoice Mode
Tax Area: BLA Blair City						
ACCT	500000073	500000073	BOB'S PLUMBING			Grouped
CUST	77	500000073	BOB'S PLUMBING			Grouped
INT	3195551017	500000073	BOB'S PLUMBING			Singular
TEL	3195551017	500000073	BOB'S PLUMBING			Grouped

**Report Suite | Processing | Grid Reports | Network:** A selectable option for "Tax/Invoice Mode" was added to the Grid Report – Network which will display the "Grouped" or "Singular" setting on network tiers. If the option is checked on a database without Avalara enabled the report results will show "N/A" for each row in the column.

The screenshot displays the 'Grid Reports' interface. On the left, the 'Report Type' is set to 'Network'. Below it, the 'Custom Reports' section has a 'Clear' button and an 'Add' button. The 'Chart Series' section includes a 'Use Series' button and a 'Calculation Met...' button. In the center, a list of filters is shown: 'Network Type', 'Technology Type', 'Service Type', and 'Service Area'. Below these, there are checkboxes for 'Use Table Column', 'Tier Status', and 'Tax/Invoice Mode', with the latter being checked. On the right, a data table is displayed with the following content:

Network Number	Network Type	Tax/Invoice Mode
3195551017	TEL	Grouped
3195551017	INT	Singular
3195551061	TEL	Grouped



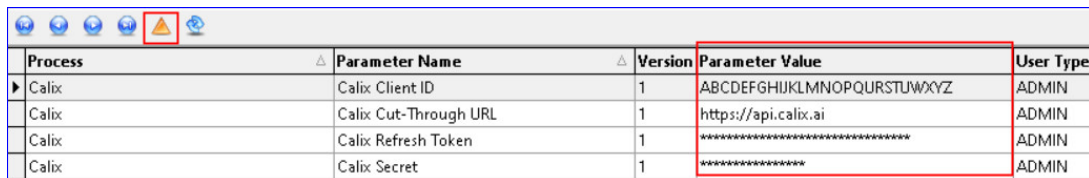
# Calix Cut-Through 23.1

## Calix API for Internet

Companies utilizing Calix Support Cloud to monitor, diagnose, and manage home Internet networks can now enjoy a time-saving, direct link to Calix from Customer Master. MACC has integrated with Calix allowing Calix users with an established Support Cloud log-in, to help avoid duplicate entries. A new “Calix Subscriber ID” icon was added and can be accessed from the Service Order/Sales Lead, Inquiry, Trouble, and Plant. Clicking the icon will take the user from the account in Customer Master to Calix for a single-entry process.

**File | Preferences | Enterprise Control:** New rows to store Calix information will be added to the Enterprise Control grid upon upgrade to be used for and enable the Calix API.

- Companies will need to obtain the applicable Parameter Value credentials from Calix to be populated in the Parameter Value column.
- Note: Call your MACC Software Support Representative for assistance with the Enterprise Control table.

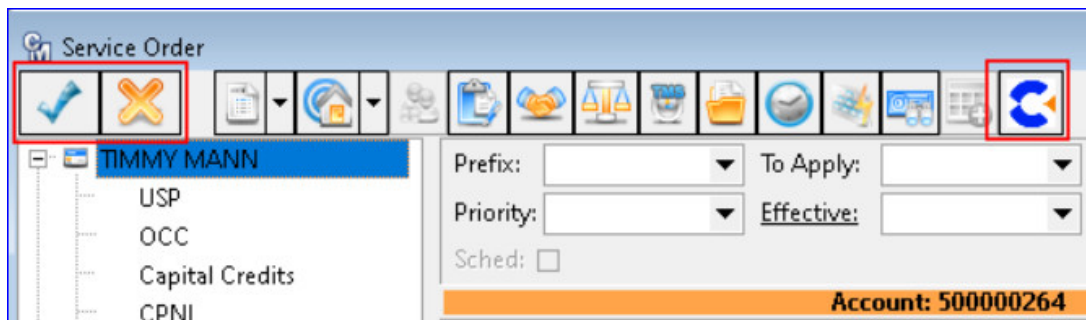


Process	Parameter Name	Version	Parameter Value	User Type
Calix	Calix Client ID	1	ABCDEFGHIJKLMNOPQRSTUVWXYZ	ADMIN
Calix	Calix Cut-Through URL	1	https://api.calix.ai	ADMIN
Calix	Calix Refresh Token	1	*****	ADMIN
Calix	Calix Secret	1	*****	ADMIN

**Service Order/Sales Lead – Calix Subscriber ID icon:** A “Calix Subscriber ID” icon was added to the Service Order/Sales Lead toolbars to provide a direct link from Customer Master to an account in Calix. Clicking the icon will open the Calix URL with the selected account populated. For the button to function the account must have an Internet Tier and the user must have a Calix login as well as an App for

Subscriber Service established and approved. If the user isn't logged into Calix when clicking the Calix icon, they will need to enter their credentials (username and password) into the Calix login screen.

Note: In addition to the new icon, the "Complete/Apply" and "Cancel" buttons on the Service Order toolbar were replaced with a checkmark and X images. The functionality of the buttons remains the same and the flyover hints for the buttons still display "Complete/Apply" and "Cancel."




















The "Calix Subscriber ID" icon can also be accessed from the Account Inquiry, Trouble Ticket Editor, and Plant Search – Current Address for accounts with an Internet tier.

**Inquiry**

Search

Account: 500000264 - TIMMY MANN










Bill Cycle: 01      Main Number: (319) 555-1220      Credit Class: B








Tier	Active	Address 1	Bus/Res	Stat...	Inacti
TIMMY MANN	05/25/2022	1212 NEBRASKA ST	R		
TIMMY MANN	05/25/2022	1212 NEBRASKA ST	R		
(319) 555-1220	05/25/2022	1212 NEBRASKA ST	R		
INT0051	05/25/2022	1212 NEBRASKA ST	R		
VID0023	05/25/2022	1212 NEBRASKA ST	R		

**Trouble Ticket Editor**

Ticket Num: New Ticket      Plant Regulated       TIMMY MANN  
 Network: INT0051      Mass Outage       Num: 500000264  
 Type: Internet      Pending Network       Status: Active  
 Serv Type:      Tech Type:      SO       Scheduled

**Plant Search - Current Addresses**

Account

Phone: INT0004      Account:

Last Name:

Full Name:

# Commissions 23.1

## Importer: Updates for Commissions OCCs

The Commissions module was modified in the previous release of Customer Master. MACC continues to enhance Commissions by updating the Importer tool with capabilities to mass import OCCs for Commissions to accounts/networks.

**Tools | Mass Processing | Import Tool – OCCs:** The OCC Import Type was updated to include Commission details from the USP Code. With these additional fields, users can use the tool to mass import OCCs for Commissions. Multiple fields relating to Commissions, such as Account Name/Number, already exist in the OCC Import Type. The following Commission information was added to the existing OCC Import type:

- Network Name
- Commission Billing Type
  - Initial
  - Recurring
- Term
  
- Commission Type
  - Percentage
  - Flat Rate
  
- Commission Rate (matches Commission Tool 'Rate' column)
  - Percentage Value
  - Flat Rate Amount
  
- Commission Agent (Non-Employee)
- Commission Employee

Importer

## Edit: OCC-Commissions

Define a field

Field: [Dropdown]

By Position  
 By Default Value

Edit Setup

Name: OCC-Commissions

Import Unbound Columns

Field	
Company Number	OCC Amount
OCC Quantity	OCC Date
Prior Month	OCC Description
CM Calc Taxes	OCC Extended Desc
OCC Date	OCC Quantity
Network Number	Prior Month
OCC Amount	USP Code
USP Code	USP Svc Area
Commission Billing Type	Batch Name
Commission Type	CM Calc Taxes
Commission Rate	GL Account
	Use GL on USP
	Permanent OCC
	Start Bill Date
	End Bill Date
	Commission Billing Type
	Commission Type
	Commission Rate
	Commission Employee
	Commission Agent

Next
Cancel

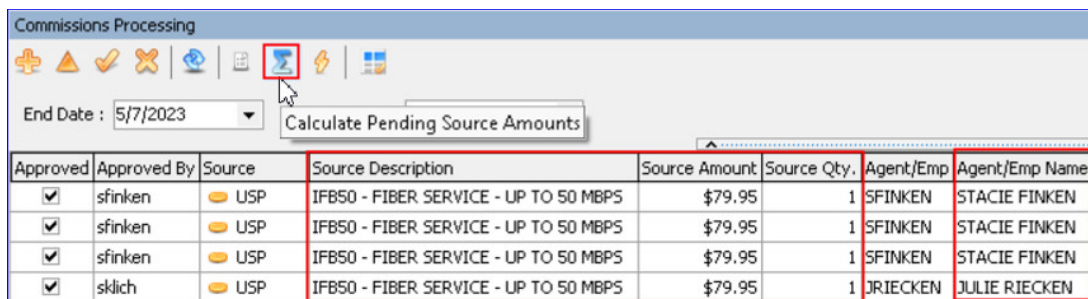
# Commissions Reports 23.1

## Commissions Refinements

Refinements were made to Commission’s processing grid and reports to provide clarity and a user-friendly process. Additional columns were added to further define the Source, and new functionality to “approve all/cancel all” commissions from the grid is available. In addition, a new button in the processing screen allows users to calculate pending source amounts.

**Commissions Suite | Processing | Commissions:** New columns and buttons were added to the Commissions Processing grid which includes:

- Calculate Pending Source Amounts: Calculate only pending amounts.
- Source Description: Displays the description of the commissionable USP/Contract/OCC.
- Source Amount: Displays the amount of the USP/Contract/OCC.
- Source Quantity: Displays the quantity of the USP/OCC.
- Agent/Employee Name: Displays the Full Name of the agent or employee.

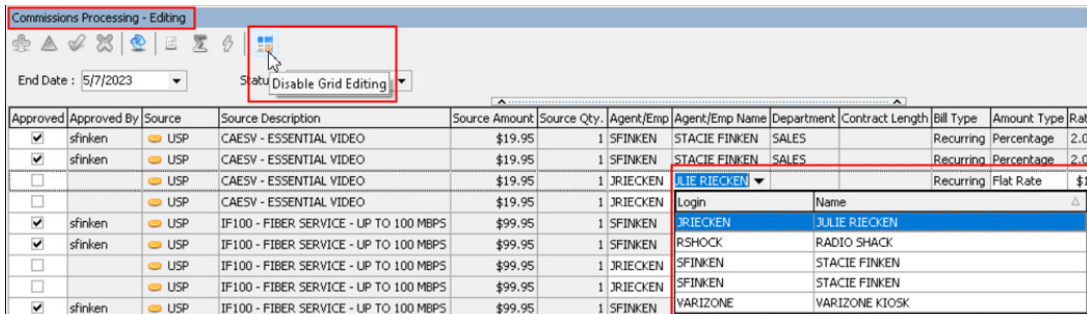


The screenshot shows the 'Commissions Processing' window. The toolbar includes a button with a blue hourglass icon, which is highlighted by a red box and a tooltip that reads 'Calculate Pending Source Amounts'. Below the toolbar, there is a dropdown menu for 'End Date' set to '5/7/2023'. The main area contains a table with the following data:

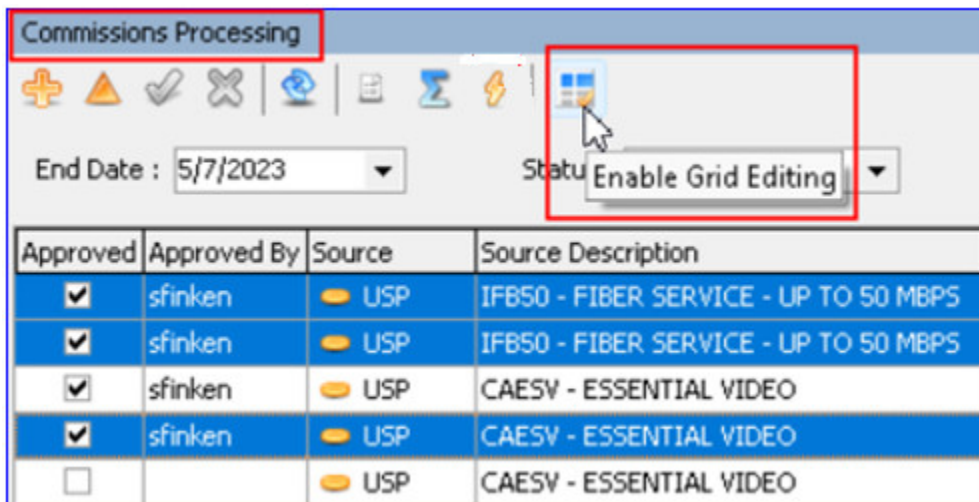
Approved	Approved By	Source	Source Description	Source Amount	Source Qty.	Agent/Emp	Agent/Emp Name
<input checked="" type="checkbox"/>	sfinken	USP	IFB50 - FIBER SERVICE - UP TO 50 MBPS	\$79.95	1	SFINKEN	STACIE FINKEN
<input checked="" type="checkbox"/>	sfinken	USP	IFB50 - FIBER SERVICE - UP TO 50 MBPS	\$79.95	1	SFINKEN	STACIE FINKEN
<input checked="" type="checkbox"/>	sfinken	USP	IFB50 - FIBER SERVICE - UP TO 50 MBPS	\$79.95	1	SFINKEN	STACIE FINKEN
<input checked="" type="checkbox"/>	sklich	USP	IFB50 - FIBER SERVICE - UP TO 50 MBPS	\$79.95	1	JRIECKEN	JULIE RIECKEN

An “Enable Grid Editing” button was added to the toolbar to turn grid editing on and off. The grid looks and functions differently when editing

is enabled/disabled. When grid editing is enabled the top of the screen will display “Commissions Processing – Editing.” Editable fields in the grid are white and the non-editable fields are gray.

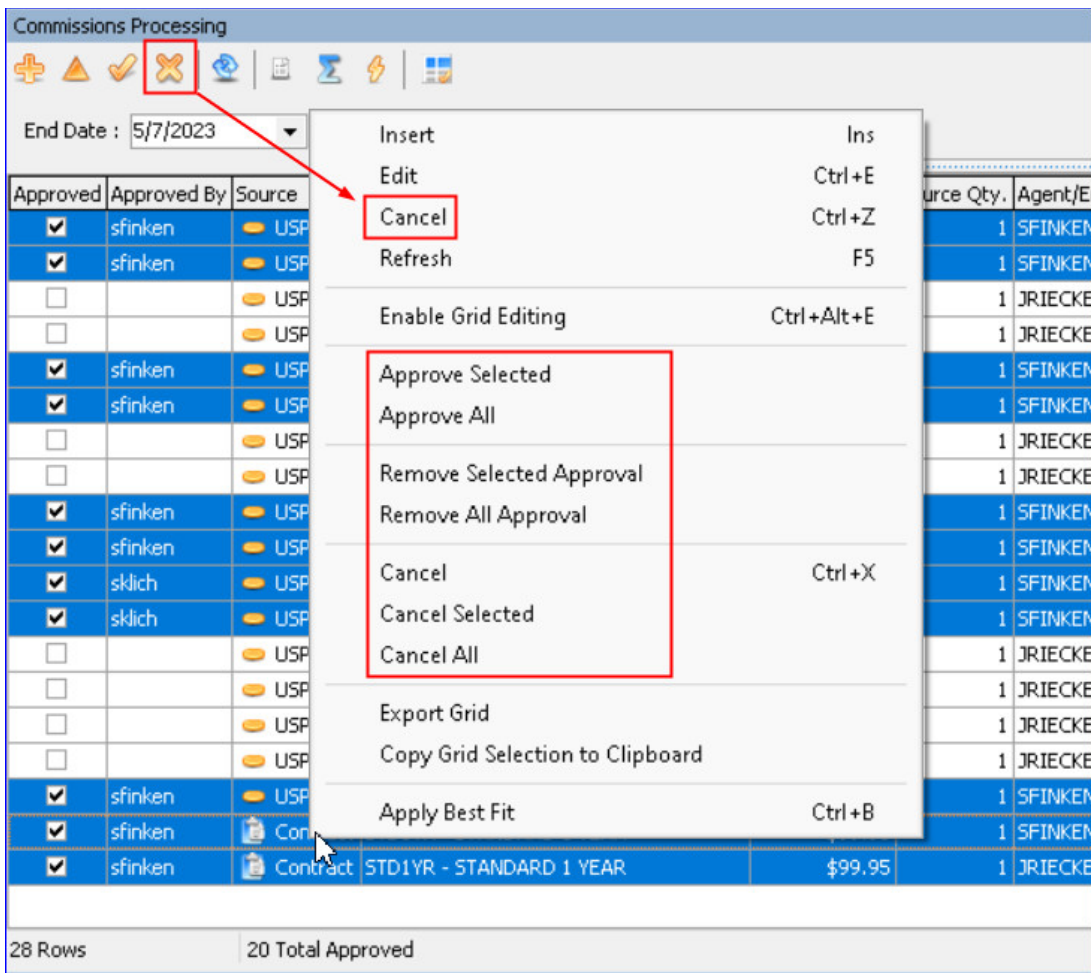


When grid editing is disabled any/all the selected rows will be blue and all others white. Multiple rows can be selected for approval, cancellation, etc. The keyboard buttons “Shift” or “CTRL” can be utilized to select multiple or just certain rows.

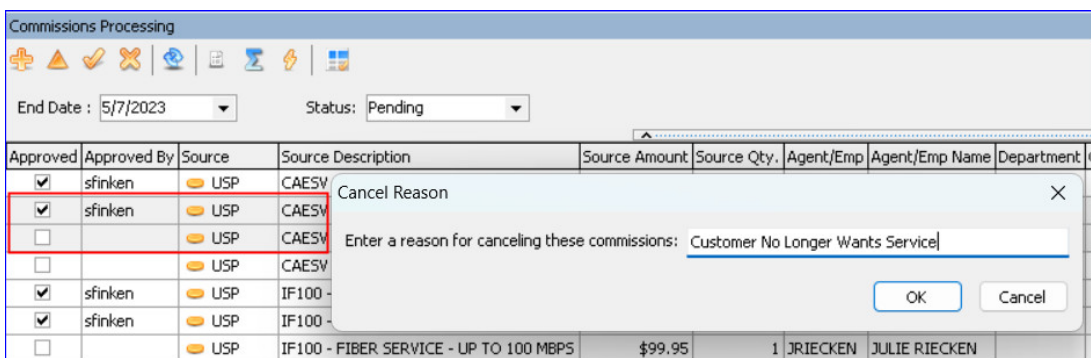


The Commissions Processing grid’s right-click menu now has some additional options, as well as a functionality change on the existing Cancel option. The Cancel option now behaves the same as the cancel button (X) which undoes pending changes when in grid edit mode. “Approve Selected” and “Approve All” options can be used to approve selected or all commissionable items in the grid simultaneously. The “Remove Selected Approval” and “Remove All Approval” options will “undo” any applicable approvals.





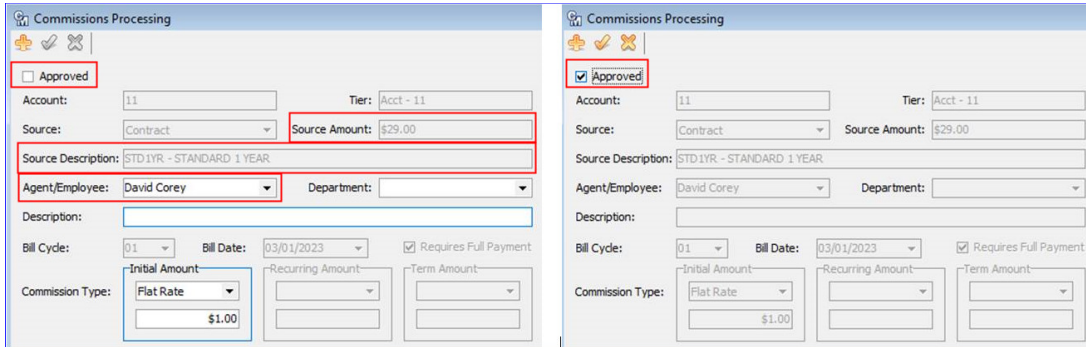
Using the “Cancel,” “Cancel Selected,” and “Cancel All” options, open the Cancel Reason Editor for the selected row(s) to prompt users to enter a single Cancel Reason for all the selected records.



When editing a commission row, checking or unchecking the “Approved” checkbox to approve commissions now enables/disables certain fields of the screen, which brings the editor functionality in line with the grid. Source Amount and Source Description fields were also



added to the editor and the Agent/Employee field now includes the full name in the drop-down.



**Commissions Suite | Reports | Commissions:** The following items were added to the Commission's Report:

- Agent/Employee Name
- Source Amount
- Source Quantity
- Commission Percentage (Rate)
- The Amount column now displays the estimated amount for pending records.

Note: The Pre-Calculation check box that was previously available on the reports parameter screen was removed as the Source Amount/Quantity is now included in Commissions Processing which includes the pre-calculation.

All Rpt Areas		Commissions			Page 3 of 5	
CO # : 470		Grouped By None			2/7/2023 5:40:26 PM	
OCN # : 470a		SUCCESS TELEPHONE CO 21.2.1 PRODUCTION			sklich	
Bill Cycle: 01	Approved Options: None	Effective Date: All	Service/Contract: All			
Bill Cycle Date: Begin - 2/1/2023	Processed Options: None	Canceled Options: None	Agent/Employee: All			
Acct Num	Acct Name	Bill Cycle	Effective Date	End Date		
775	JACK SPARROW	01	12/20/2022	2/1/2023		
CAESV - ESSENTIAL VIDEO						
	Agent/Employee	Approved By	Process Date	Cancel Date	Bill Cycle Date	Source Amount
	STACIE FINKEN	sfinken			02/01/2023	Quantity
						Rate
						Amount
						\$19.95
						1
						2.00%
						\$0.40
<b>Total Amount for this Sale:</b>						<b>\$0.40</b>

# Disable PII 23.1

## Clear and Disable PII (Personally Identifiable Information) from Customer Master

In an effort to keep security a priority and remove potential vulnerabilities an update script is available to permanently clear and disable all PII (Personally Identifiable Information) fields from Customer Master. Please contact your MACC Software Support Representative for assistance if interested in clearing PII.

The data in the following fields can be permanently cleared and disabled so information cannot be entered into the fields going forward:

- **Credit Screen**

- License (Driver's License Number)
- Social Security Number (Credit ID)
- Federal Tax ID (2nd Credit ID)
- Tribal ID
- DOB (Date of Birth)
- Spouse DOB (Spouse Date of Birth)
- *Note:* Clearing this data may compromise your company's ability to retrieve credit report scores from Experian.

- **Co-Applicant Screen**

- License
- Social Security Number
- Tribal ID

- DOB
  
- **Lifeline Screen**
  - DOB
    - *Note:* Not having a DOB on this screen may compromise the ability to use Customer Master for NLAD filings.
  
  - Last four digits of the Social Security Number
  - Tribal ID
  
- **ACP Screen** – Service Order | Internet Network | Internet Node | ACP Icon:
  - DOB
    - *Note:* Not having a DOB on this screen may compromise the ability to use Customer Master for ACP filings.
  
  - Last four digits of the Social Security Number
  - Tribal ID

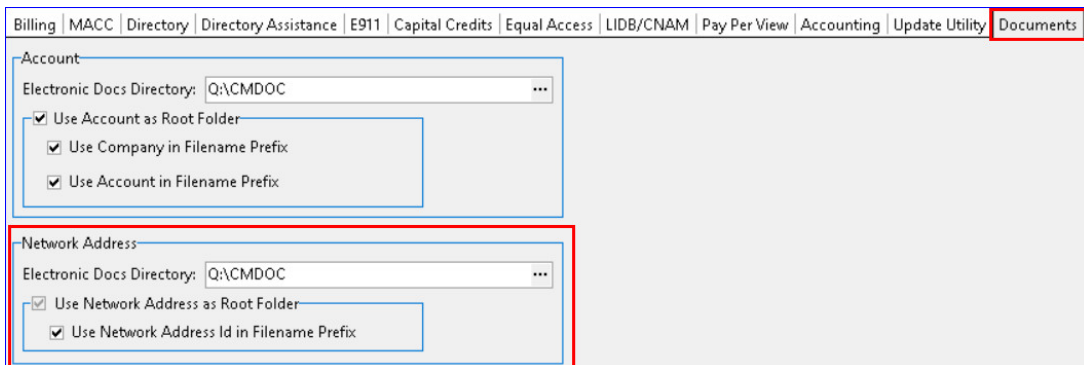
*Note:* All the PII data fields are removed as a whole from the database, not on a one-to-one basis.

# Electronic Documents 23.1

## Address Attachments

To provide greater convenience to technicians in the field, MACC has expanded Electronic Documents functionality to include the ability to attach documents such as pictures to network addresses in Customer Master and MACC Mobile. Additionally, the Electronic Documents icon was added to the Address table, Address Search in the Service Order/Sales Lead, and Plant Search.

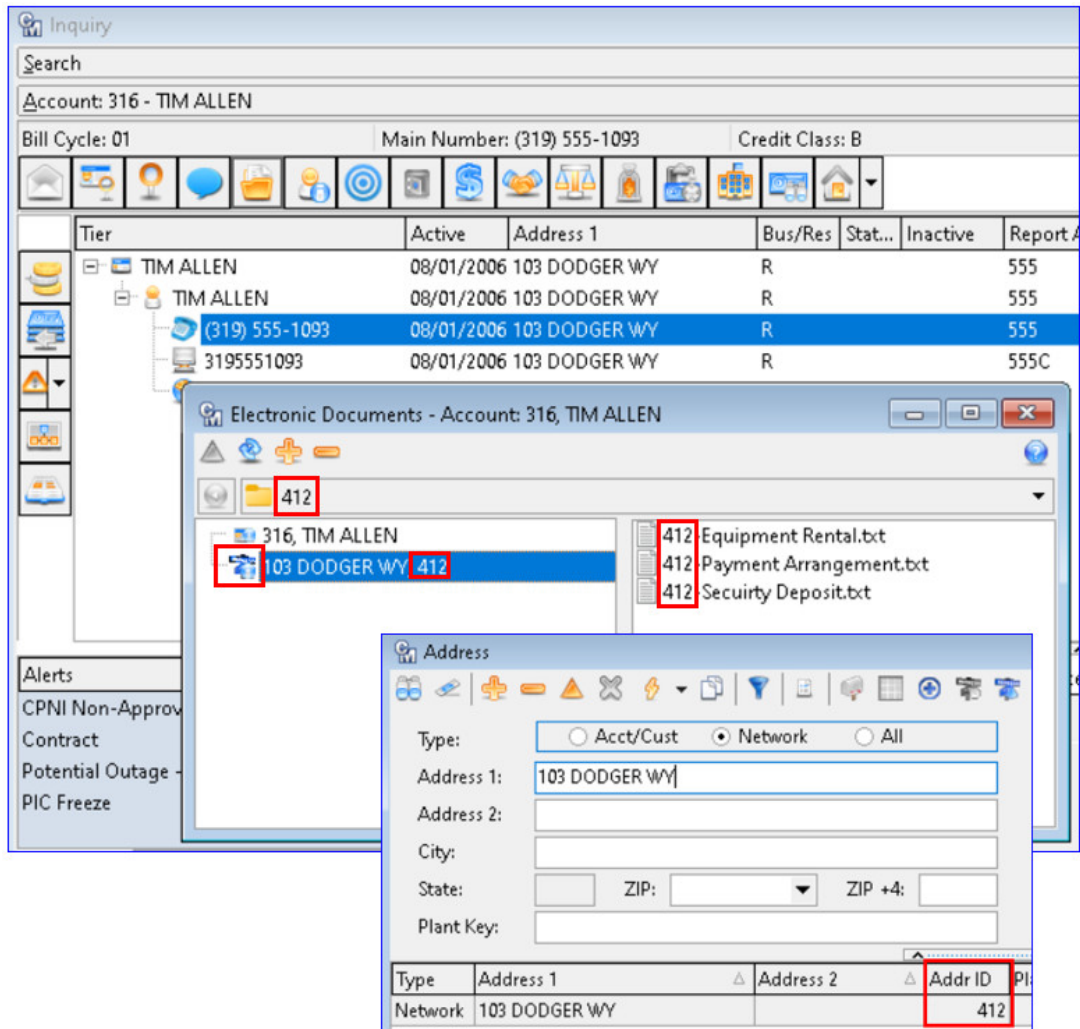
**File | Preferences | Transmission | Documents tab:** Changes were made to the Documents tab at File | Preferences so users can establish a network directory for network address attachments. Similar to the Account options a group box for Network Address was added with a checkbox to “Use Network Address as Root Folder” as well as an option to “Use Network Address ID in Filename Prefix.”



**Inquiry | Electronic Documents Icon:** The Electronic Documents screen accessed from Inquiry will now give users the ability to add both the existing Account and the new Network Address Electronic Documents.

- Account Folder: The yellow folder icon for the Account was replaced with an Account image. A blue “i” will be on the image if there are folders or attached documents present for the account.

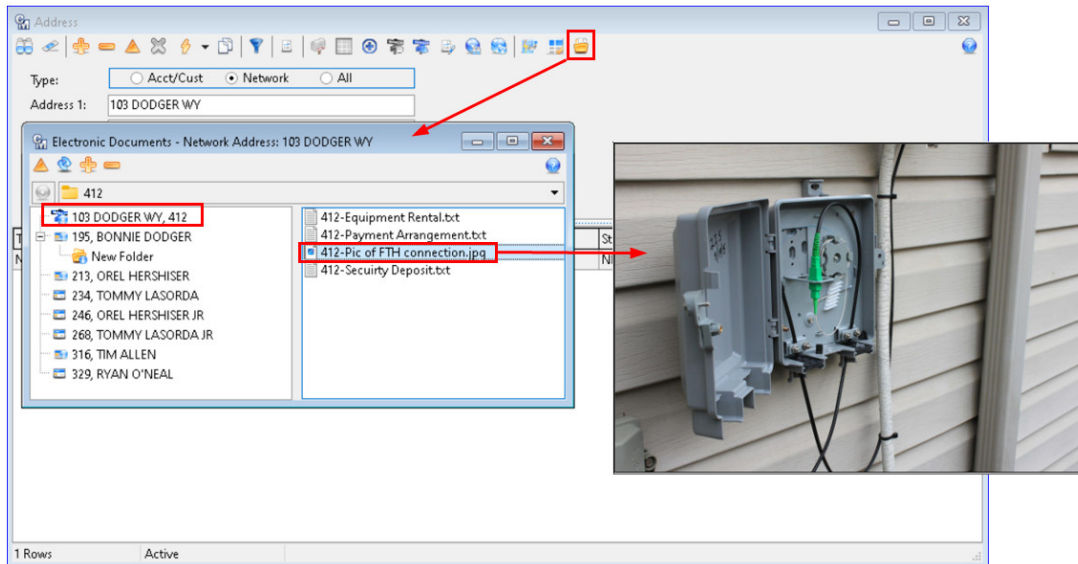
- **Network Folder:** When focused on the network folder, the folder name above the pane will display the Address ID (from the address table) depending on the selections for Network in File Preferences. The network address folder will display the network address and the address ID, with a blue "i," if there are folders or attached documents present for the network.



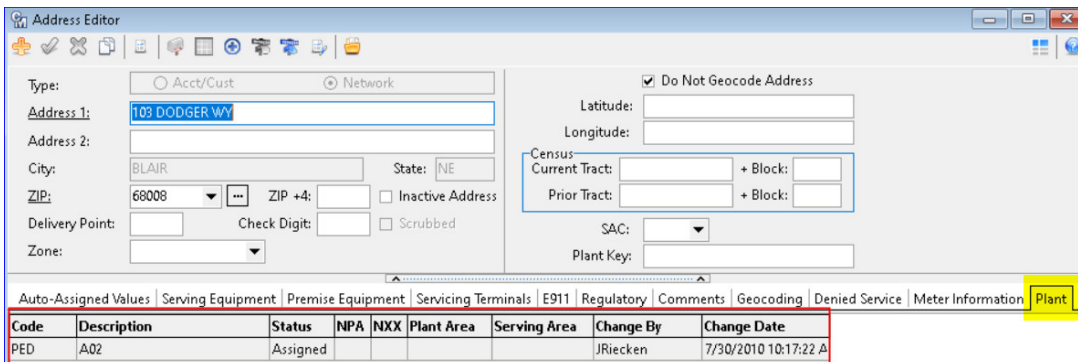
### Maintenance | Common | Address (Network) | Electronic

**Documents icon:** An Electronic Document icon was added to the Address grid as well as the Address Editor to allow users to attach pictures or documents to a network address. A folder for each account where the address resides will display in the left pane, as well as folders for active and disconnected networks to view documents everywhere the network address exists. In the example, a picture of the fiber to the

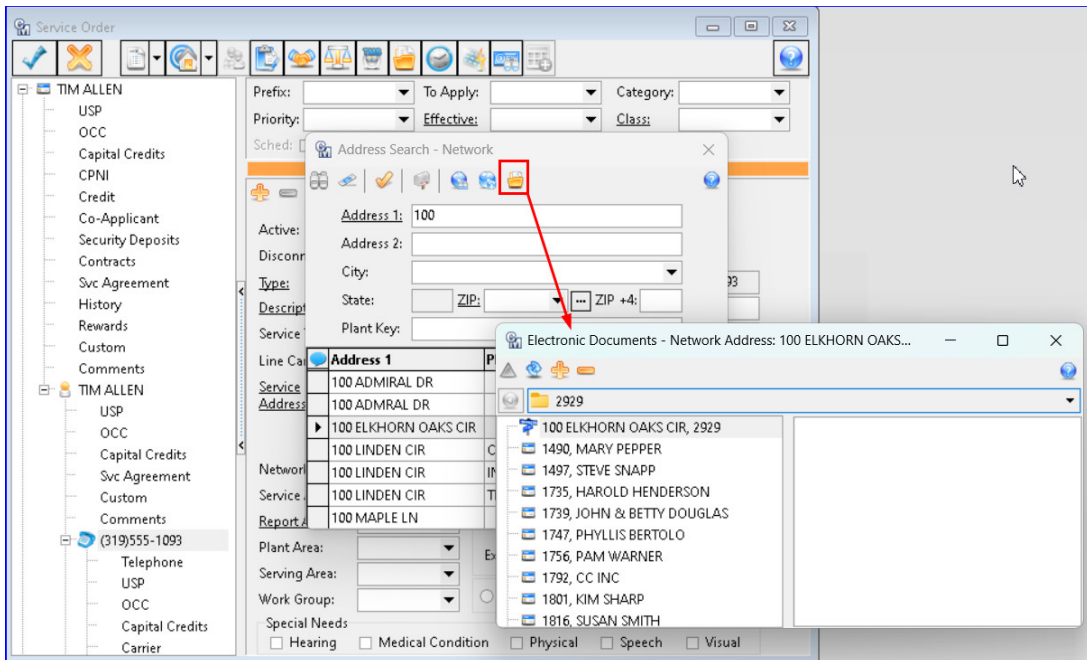
home connection was attached to the address which can be viewed from all Electronic Document locations throughout Customer Master.



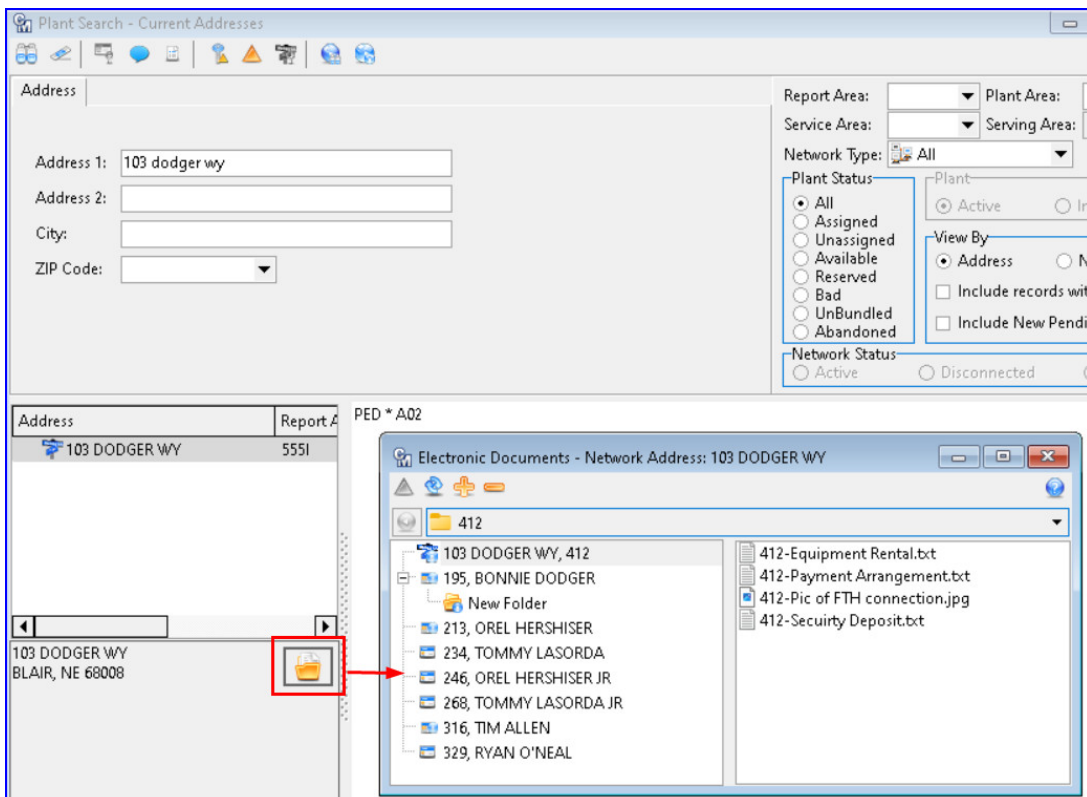
In addition to the Electronic Document changes in the Address Editor, a Plant tab was added to view Plant associated with the network address. The grid displays the same information as Plant Search for network addresses only.



**Service Order/Sales Lead | Address Search – Network | Electronic Documents:** An Electronic Document icon was added to the Address Search toolbar that appears when making an address change. Clicking the icon will show electronic documents for the highlighted network address.



**Plant Search – Address (current or previous) Electronic Documents icon:** An Electronic Documents button was also added to the Address group box in Plant Search. The button is available when searching by Account, Address, and Plant tabs.



# FCC – BDC Grid Report 23.1

## BDC Technology Option Added To Grid Report

Changes were made to the Grid Report – Network to include and report on BDC and 477 Technology with edits made to Upstream and Downstream.

**Reports Suite | Processing | Grid Reports – Network:** When generating the Network grid report, both BDC Technology and 477 Technology options are available for selection and will display the technology when viewing the report. The Upstream and Downstream options can be used for both BDC and 477.

The screenshot shows the 'Grid Reports' interface. At the top, there are buttons for 'Settings', 'View', and a printer icon. Below this, the 'Report Type' is set to 'Network'. The 'Custom Reports' section is highlighted with a blue border and contains a dropdown menu, a 'Clear' button, and an 'Add' button. Below the 'Custom Reports' section is a 'Chart Series' table with columns for 'Use', 'Series', and 'Calculation Met...'. To the right of the 'Custom Reports' section is a list of options with checkboxes: 'Network Type', 'Technology Type', 'Service Type', and 'Service Area'. Below this list is a table with columns for 'Use' and 'Table Column'. The 'Table Column' section contains four items, each with a checked checkbox: 'Upstream', 'Downstream', 'BDC Technology', and '477 Technology'. The 'BDC Technology' and '477 Technology' items are highlighted with a red border.

Use	Table Column
<input checked="" type="checkbox"/>	Upstream
<input checked="" type="checkbox"/>	Downstream
<input checked="" type="checkbox"/>	BDC Technology
<input checked="" type="checkbox"/>	477 Technology



# FCC (ACP) – Automatic Enroll/De-Enroll 23.1

## ACP Enroll/De-Enroll API Automation to USAC

USAC has an API to allow companies to send enrollment and de-enrollment information for ACP services with NLAD, creating efficiency with ACP records. MACC has automated our existing interface so users can send a single ACP record at the time of entry, eliminating the need to send batch records. Users can choose to automatically connect to USAC via the API or continue with the manual process currently in place. If your company is interested in activating the ACP API contact your Client Solutions Manager at MACC.

**Maintenance | Common | Employee:** A “USAC Password” field was added to the Employee Editor which is needed for the ACP API transactions for NLAD. The USAC Rep ID will be required if the USAC Password is populated and vice versa.

The USAC Password is an encrypted field but can be viewed by clicking on the field.

**Employee Editor**

ID: sklich      Designation:

First Name: SUE      USAC Rep ID: \*\*\*\*\*2T4S

Middle Name:       USAC Password: \*\*\*\*\*

Last Name: KLICH

Full Name: SUE KLICH

Net Login: sklich

Email: sklich@maccnet.com

Email to Text: 4025334794@vtext.com      ...

Text Number: 4025334794

Inactive

Default Me for Time Entry

Automatically Suggestive M

Automatically Open Accou

**Inquiry | FCC ACP:** An FCC ACP icon was added to the Inquiry screen so users can access it outside of a service order. The icon is available for users with or without the ACP interface. The icon is only visible on the toolbar when highlighted on an Internet or Cellular tier.

When the ACP API is activated, the ACP record will automatically be sent to USAC on the Post/Save in the FCC ACP screen. Users will be able to enroll, de-enroll, transfer, and update subscriber information on an individual basis as needed. If the interface is not activated, the screen will function as it did previously.

**Inquiry**

Search

Account: 12991 - LUNA SMITH

Bill Cycle: 01      Main Number:      Credit Class:

Tier	Active	Address 1	Bus/Res	Stat	Inactive	Report Ar...	Tax Area	Svc Area	Net Des
LUNA SMITH	03/08/2023	3 BRIARPOINT	R			3821	057C		
LUNA SMITH	04/04/2023	3 BRIARPOINT	R			3821	057C		
43567980	04/04/2023	1 1/2 E 3RD ST APTB				3821	057C		LUNA S

**FCC ACP**

Subscriber ID: 8876543      SAC: 835015      Sent Date:      Application ID:

First Name: LUNA      Last 4 of SSN: 6790      Service Type: DSL

Last Name: SMITH      Tribal ID:      Initialization Date: 4/4/2023

DOB: 7/6/1962      USAC Rep: sklich      Expected Rate:

Phone # in Program: (402)533-8877      Certification: ACP

Consumer Contact Information

Email:

Phone #: ( ) -

Transaction Type: enroll

Transfer Exception:

Transaction Date: 4/4/2023

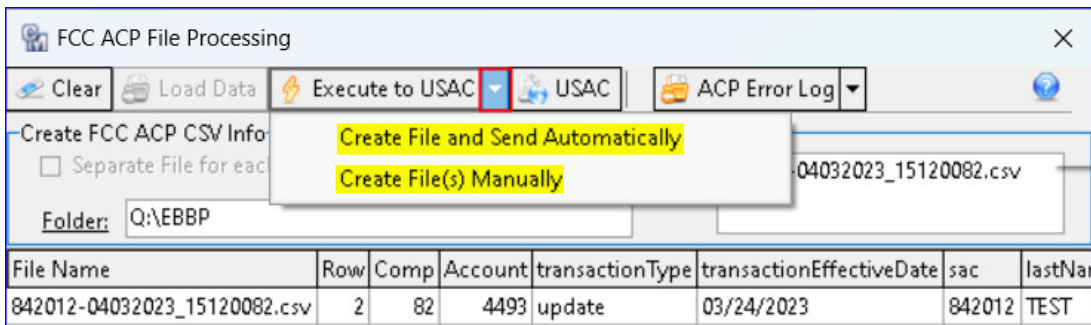
Update Indicator

Tribal Benefit

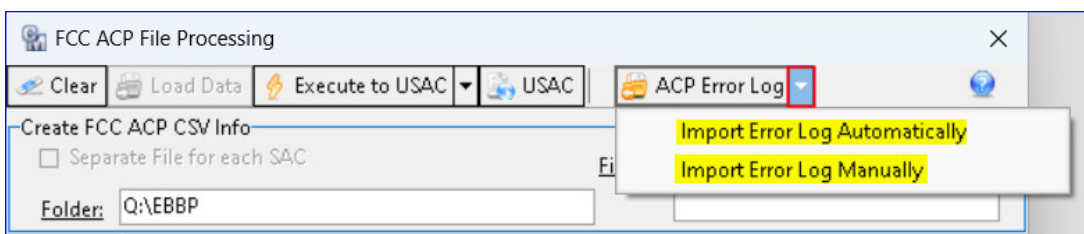
Dup Address Exception

Consumer Fee

**Tools | Mass Processing | FCC ACP | FCC ACP File Processing:** The “Create and Upload FCC ACP File” menu item at Tools | Mass Processing | FCC ACP was changed to “FCC ACP File Processing.” When the interface is activated, the “Create File” button in the file processing screen is changed to “Execute to USAC.” It remains as “Create File” if the interface is not activated. The Execute to USAC button has a drop-down menu so users can choose to “Create File and Send Automatically” or “Create Files Manually.” The automatic option will automatically connect to and send the file directly to USAC via the ACP API. Selecting “Create Files Manually” will continue to create the ACP file manually. When an employee has the proper credentials the Execute to USAC button can be clicked to automatically send the file to USAC without selecting it from the drop-down menu.



The “Import Error Log” button was changed to “ACP Error Log.” A drop-down menu was added next to the button, allowing users to “Import Error Log Automatically” via the ACP API or “Import Error Log Manually.” When an employee has the proper credentials the “ACP Error Log” button can be clicked to automatically retrieve any potential error log from USAC without selecting it from the drop-down menu.



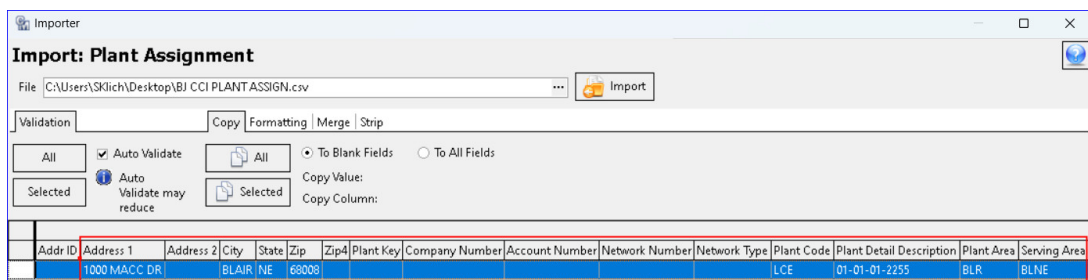
**Reports Suite | Processing | Grid Reports | FCC ACP:** A “Failed Date” and “Failed Reason” check box option was added to the FCC ACP grid report. With these options in place the report can be used to discover ACP records that failed and why.

# Importer 23.1

## Importer: Update to Plant Assignment

The Plant Assignment feature in the Importer tool was altered to add Serving Equipment to the address based on the Serving Area assignment. With this update in place, when the tool is used to import Plant Assignment to addresses, if the address being imported has a Plant Area and Serving Area, any Serving Equipment tied to the Serving Area will also be populated on the address.

**Tools | Mass Processing | Importer – Plant Assignment:** The Plant Assignment Import Type can be used in the Importer tool to import Plant. When a Serving Area value is imported, any Serving Equipment tied to the Serving Area will also be populated at the address. In the example, Plant is being imported to an address and the Serving Area BLNE has the Serving Equipment Code “ONT” tied to it for Internet Network Types.



Once the import is complete, the Serving Equipment tab on the address in the maintenance table was populated with the Serving Equipment Code “ONT” that is tied to the imported Serving Area “BLNE.”

**Address Editor**

Acct/Cust       Network

**Address 1:** 1000 MACC DR

**Address 2:**

**City:** BLAIR      **State:** NE

**ZIP:** 68008      ZIP +4:       Inactive Address

**Delivery Point:**      **Check Digit:**       Scrubbed

**Zone:**

---

Auto-Assigned Values    Serving Equipment    Premise Equipment    Servicing Termin

Code	Description	Net Type	Serving Area
ONT	ONT	INT	BLNE

# Integration for Text Messaging 23.1

## Integration for Text Messaging

MACC has integrated with an SMS messaging platform to provide a text messaging solution to engage customers at every step of their journey. This interface will align with cybersecurity practices to secure and streamline communications. A Text Message option was added to all messaging triggers in Customer Master which does not require the carrier name. Users can continue to utilize our existing Email to Text setups for notifications but now have another texting option. Note: If interested in this feature, please contact your Client Solutions Manager.

### EMPLOYEE EDITOR

Maintenance | Common | Employee | Employee Editor: From the General tab in the Employee Editor, the existing SMS Mobile Number field will be used for texting when the interface is activated. The field's label was changed from "SMS Mobile Number" to "Text Number" in the editor and the grid. When populated, the Employee can receive notification texts from MACC's messaging services within Customer Master. The "Email to Text" option can still be utilized for companies wanting to continue using this option.

In the "Default Inbox Notification" dropdown the following options were relabeled:

- "SMS" option was changed to "Text"
- "Email and SMS" was changed to "Email and Text"
- "Neither" was changed to "None"

These label changes were also made to the Notifications drop-down options in the Employee Editors "Department" and "Work Group" tabs.

Employee Editor

ID: 0011  
First Name: Dan  
Middle Name:  
Last Name: Murray  
Full Name: Dan Murray  
Net Login: dmurray  
Email: dmurray@live.com  
Email to Text : ...

Text Number: 3195556789

General Info | Payment Defaults | Contacts | Department

TMS ID:  
TMS CO:

Default Inbox Notification: None
 

- Email
- Text**
- Email and Text
- Email to Text
- Email and Email to Text
- None

Bus / Res Default  
 Bus  Res

Default P.E. AM Material C

Schedule  
Work Hours  
Start Time: 08:00 AM      
End Time: 05:00 PM

First day of week:  
 Auto Send to Th

OCC Authorization

## INQUIRY

### Inquiry and Service Order | Account View | Account Contact

**Information:** A "Use for Text" column and checkbox was added to the Account Contact Information grid and are only available if the interface is activated. An account must have a Type of Phone, a mobile number entered in the Number/Address field, and "Use for Text" checked to receive a Text Message notification.

Name*	No Ema	Prima	Changed By	Changed Date
BILL SMITH	<input type="checkbox"/>	<input checked="" type="checkbox"/>	CM 20.2.1 Upgrad	12/17/2020 10:

Source	Type*	Number/Address*	Contact Ty	Use for Text	Co	Desc
Account	Phone	3195554678		<input checked="" type="checkbox"/>		

**Inquiry | CRM Contact:** Similar to Email to Text, any Text Message notifications for an account will display in the CRM Contact screen.

### NOTIFICATION TRIGGER POINTS

**Maintenance | Messaging | Notification Setup:** The “Email to Text Message” checkbox in all the Notification Setup Editors was changed to a drop-down menu labeled “Text Message.” Three options are available for messaging:

- Email to Text – existing functionality
- Text Message (the new texting option)
- Email – leaving the Text Message field blank will send notifications for a selected Trigger Point as Email.

Note: If the interface is not activated the drop-down will contain “Email to Text” only.

Notification Setup Editor	
<b>Trigger Point Selection</b>	Configuration Name: Appointment Notification (TEXT MESSAGE)
Trigger Point: Appointment Notification	From:
What type of notification would you like to send? (Pick One)	Text Message: Text Message
<input checked="" type="radio"/> Appointment Notification to Customer.	Email to Text
	Text Message

The Notification Setup grid includes an “Email to Text” and a “Text Message” column to quickly identify the messaging option selected for each notification setup.



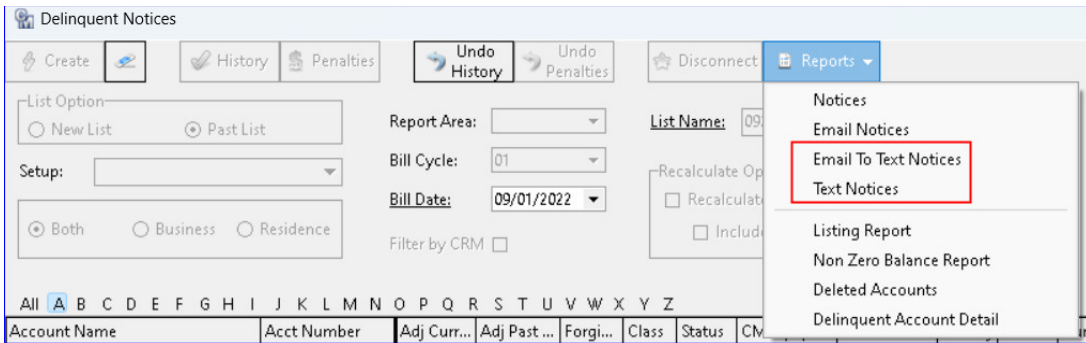
Config Name	Trigger Point	Email to Text	Text Message
./k;l;k;l	CPNI Notifications	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Appointment Notification (EMAIL TO TEXT)	Appointment Notification	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appointment Notification (TEXT MESSAGE)	Appointment Notification	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Most of the Trigger Points available in the Notification Setup Editor include the Text Message option except for the following Trigger Points:

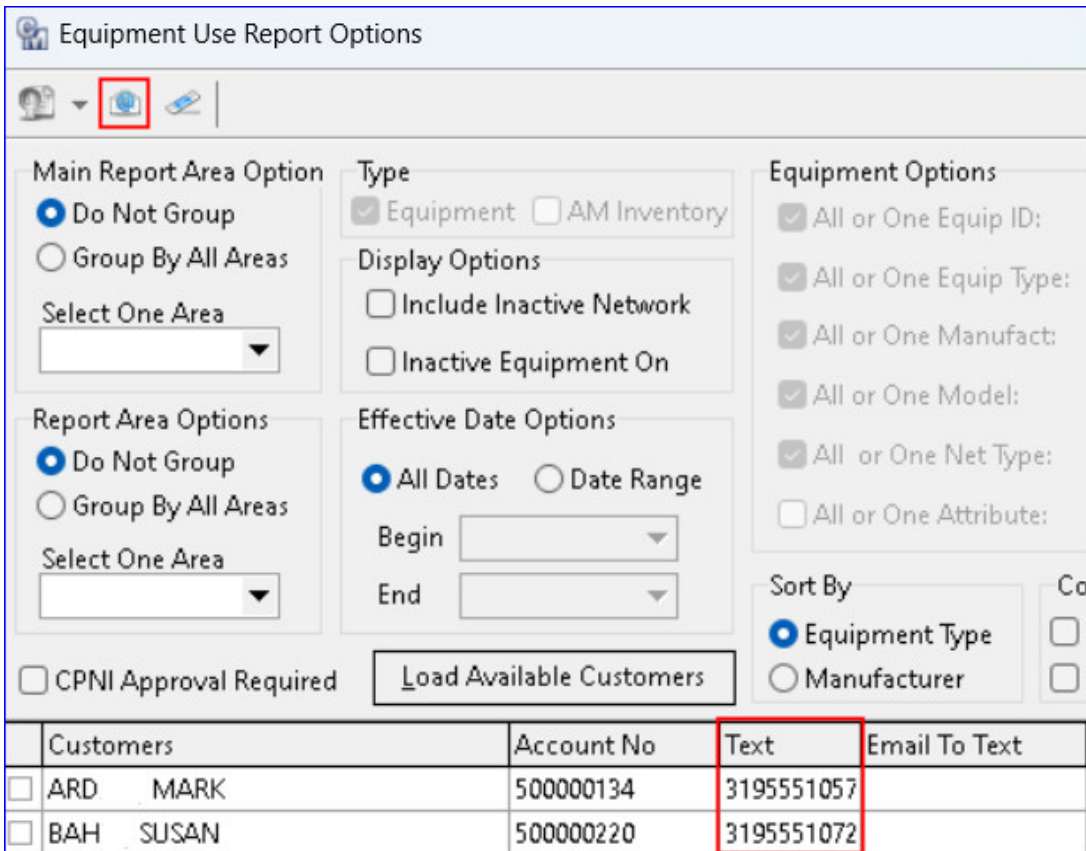
- E911 File Automation Service
- LIDB/CNAM File Automation Service

The Trigger Points listed below have the Text Message option for some but not all of their notification types. Any notification types without the Text Message option are listed. Any additional need-to-know items are described with the Trigger Points.

- Appointment Notification – Text Message option available for all notification types.
- CPNI Notifications – Text Message option available for all notification types.
  - The Account Contact Information needs to have the “Confidential” and “Use For Text” boxes checked to get a Text Message notification for CPNI.
- Delinquent Notices – Text Message is available for the “Delinquent Notice to Individual Accounts” Notification Type but not for “List of Sent Delinquent Notices of Individual Accounts.”
  - When creating delinquent notices at Packages | Delinquents | Delinquent Notices | Reports a “Text Notices” option was added to the Reports dropdown menu to send delinquent notices via text. The “Email To Text Message Notice” option in the dropdown menu was renamed “Email to Text Notices.”



- Equipment Use – Text Message option available for all notification types.
  - When sending notifications from the Equipment Use report at Reports | Network a “Text” column was added to the report screen grid to help identify accounts eligible to receive a text notification.



- Locate 811 Inbox – Text Message option available for all notification types.
- Marketing – Text Message option available for all notification types.
  - When notifications are being sent from Reports | Marketing | Account Research report the Notification Filter group box options in the Filter Options screen were remodeled.
    - Checkboxes – any combination can be selected
      - Email
      - Email to Text – existing functionality
      - Text – new text notifications
    - Radio buttons
      - A radio button option of “Accounts having all checked selections” was added to be used in conjunction with the checkbox options.
      - A radio button option of “Accounts having any checked selections” was added to be used in conjunction with the checkbox options.
  - In the example, with the options selected accounts having any of the three types (Email/Email to Text/Text) will receive notifications.

Account Research Wizard

## Filter Options

Network Type:

Non-Published Filter

No Filter

Published Only

Non-Published Only

CPNI FCC Non Solicit Options

No Filter

CPNI Approval Only

CPNI Non-Approval Only

Bus/Res Filter

No Filter

Business

Residence

Type:

Notifications Filter

Option:

Accounts having all checked selections

Accounts having any checked selection

Email

Email to Text

Text

Back Next Cancel

- A “Text Setup” drop-down menu was added to the Finish screen on the Notifications Options tab. A “Text” header and the phone number were added to the report results.

Account Research Wizard

**Finish**

File Options

Save Setup  
Save As...  
New Setup

Print Options: Notification Options

Email Setup  
MARKETING (EMAIL)

Email to Text Setup  
MARKETING (ETT)

Text Setup  
MARKETING (TM)

Preview Notifications Send Notifications

Back Finish Cancel

Account Research Report - BJ TEST  
CO # : 082 Billing Name, Billing Address, Including Bundle Elements  
OCN # : 1942 Current Date

ROCK PORT TELEPHONE COMPANY

All Accounts All Customers All Networks Active Tiers, Em

Include Tiers Having At Least 1 of the Selected Services

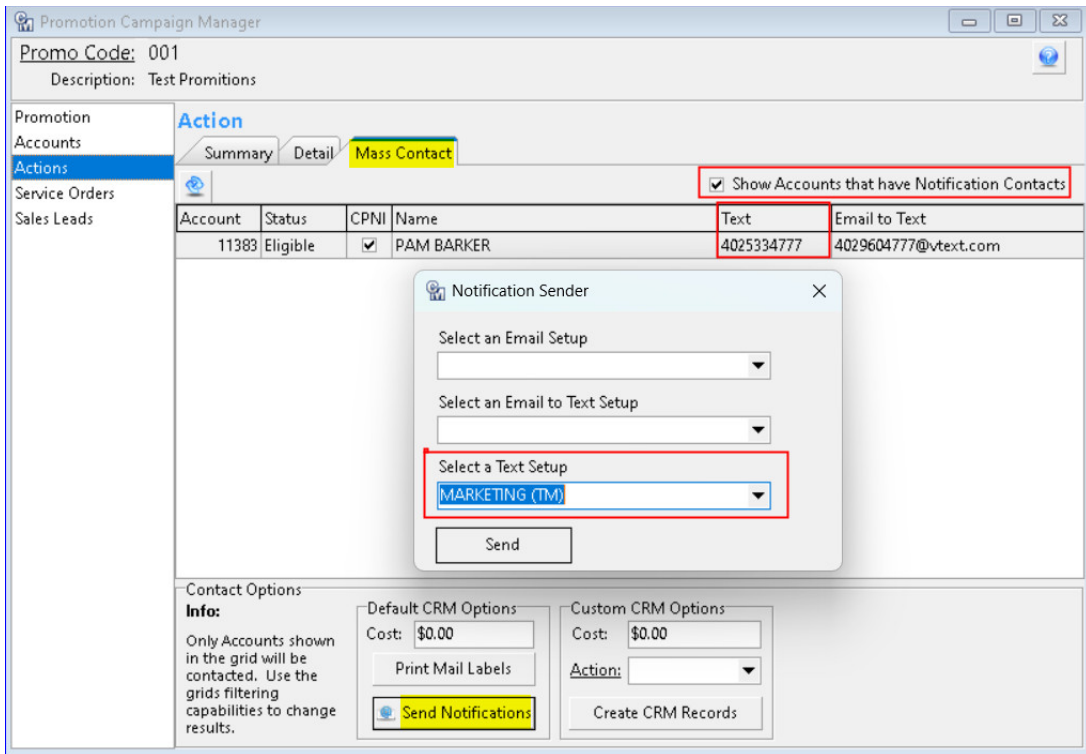
\*TEST

No Service Exclusions

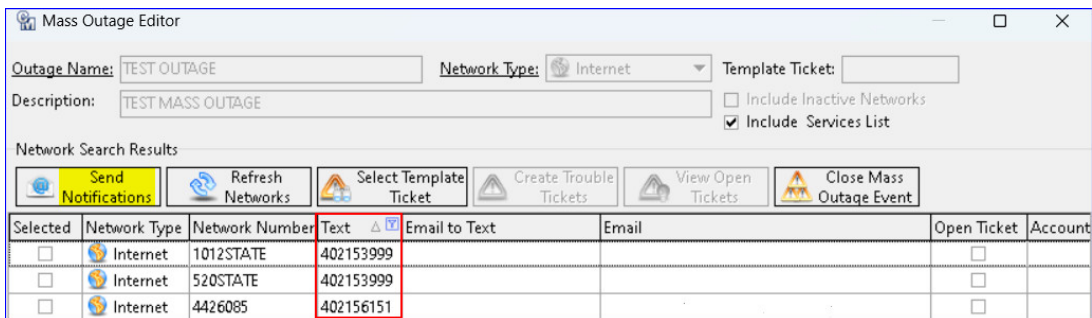
All Geographic Areas

Name	Bus/Res	Account No	Level	Tier Number	Inactive Date	Address
ALINT MARTHA'S HOUSE BED & BREAKFAST	B	9429	Acct	9429		715 E MAIN ST FAIRFAX, MO 64446-9102
MARTHAbb@MACCNET.COM						
4029608877@vtext.com						
4029608877						

- Text notifications for a promotional campaign can be sent via Text Message at Maintenance | Marketing | Promotions Setup. A "Text" column was added to the grid to identify those accounts eligible for a text notification. The check box option "Show Accounts that have Email" was changed to "Show Accounts that have Notification Contacts." To send promotional campaign notifications, a new "Select a Text Setup" drop-down is available for the selection of Marketing setups created from the Account Research report. Note: When the interface is activated the "Select a Text Setup" dropdown will be available in all Notification Sender screens throughout Customer Master.



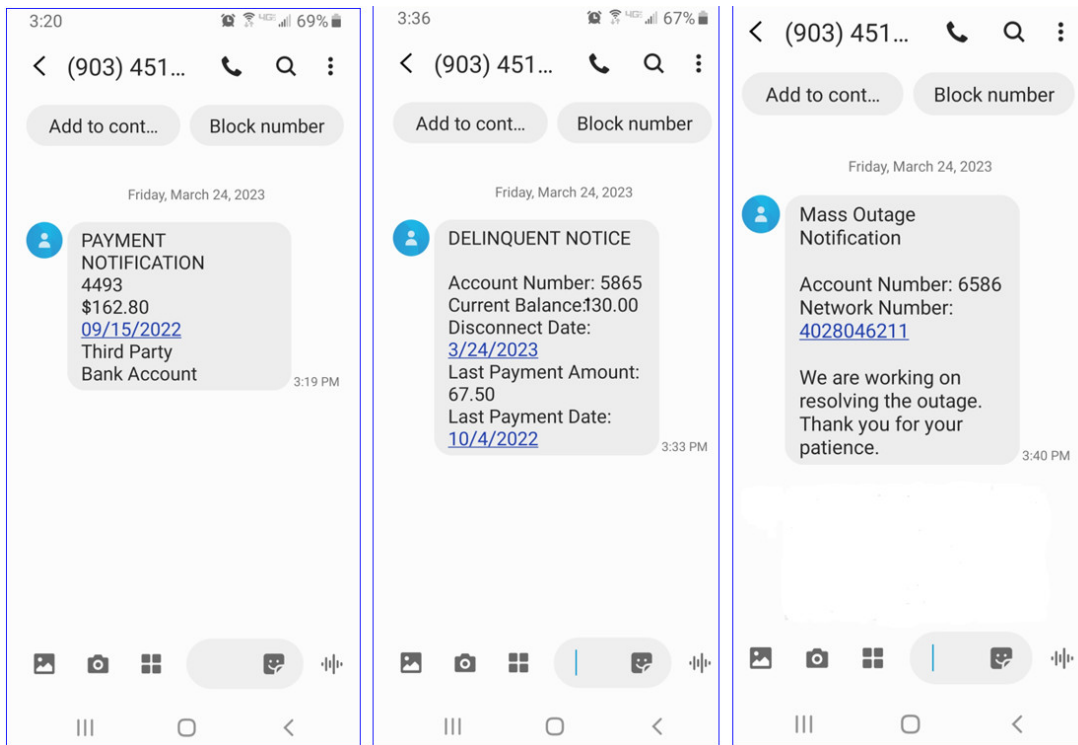
- **Mass Outage** – Text Message option available for all notification types.
  - Notifications can be texted during Mass Outages using the Mass Outage tool at Packages | Trouble | Trouble Mass Outage. When the interface is activated, a new “Text” column is visible in the Mass Outage Editor grid. Account Contact phone numbers flagged as “Use For Text” will appear in the column. The “Email Address” column was changed to “Email.”



- **Payment Notification** – Text Message option available for all notification types.

- **Sales Lead Inbox** – Text Message option available for all notification types.
- **Service Agreement Threshold** – Text Message option available for all notification types.
- **Service Order** – Text Message option available for all notification types.
- **Service Order Inbox** – Text Message option available for all notification types.
- **Service Order Welcome Packet** – Text Message option available for all notification types.
- **Trouble Inbox** – Text Message option available for all notification types.
- **Trouble Ticket** – Text Message is available from the Text Message drop-down for these notification types:
  - “Notification to Account Holder when Trouble Ticket is Cleared”
  - “Notification to Employees when Trouble Ticket Information is Changed”
- Text Message will not be available from the Text Message drop-down for these types:
  - “Notification when Trouble Ticket is Created”
  - “Misc Notification when Trouble Ticket is Cleared”
  - “Misc Notification when Trouble Ticket is Cancelled”
  - “Misc Notification when Trouble Ticket is Picked Up”

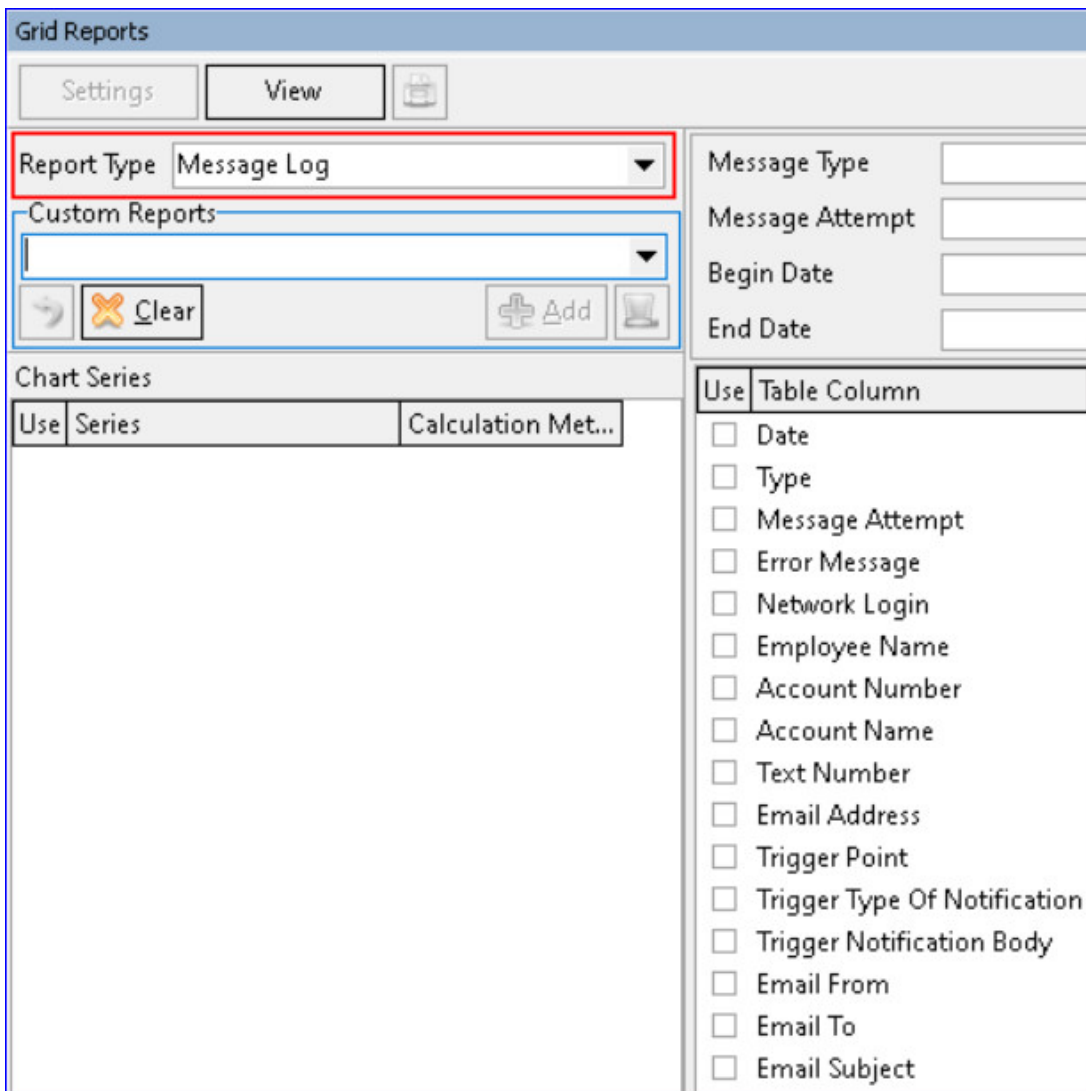
The following are examples of Text Messages received for a Payment Notification, Delinquent Notice, and a Mass Outage Notification:



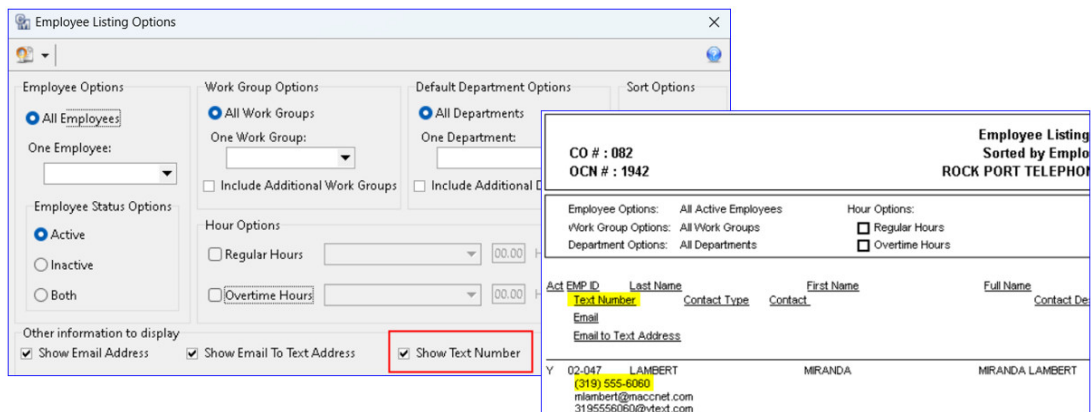
## REPORTS

**Tools | Reports | Grid Reports:** A new grid Report Type labeled “Message Log” was added to the Grid Report drop-down menu. This grid report provides a log of all successful and failed messages sent via email, email to text, and text messages. Note: The report history will be archived after two years of history has accumulated.





**Reports Suite | Reports | Miscellaneous | Employee Listing:** The “Show SMS Mobile Number” check box in the Employee Listing Reports screen was changed to “Show Text Number.” The “Show SMS Mobile Number” heading in the report results was also changed to “Text Number” and the number will display.



**Reports Suite | Reports | Miscellaneous | Notification Listing:** The “Notification Listing Report” was updated to include the Text number and the Notification Type as “Text Message” in the printed report.

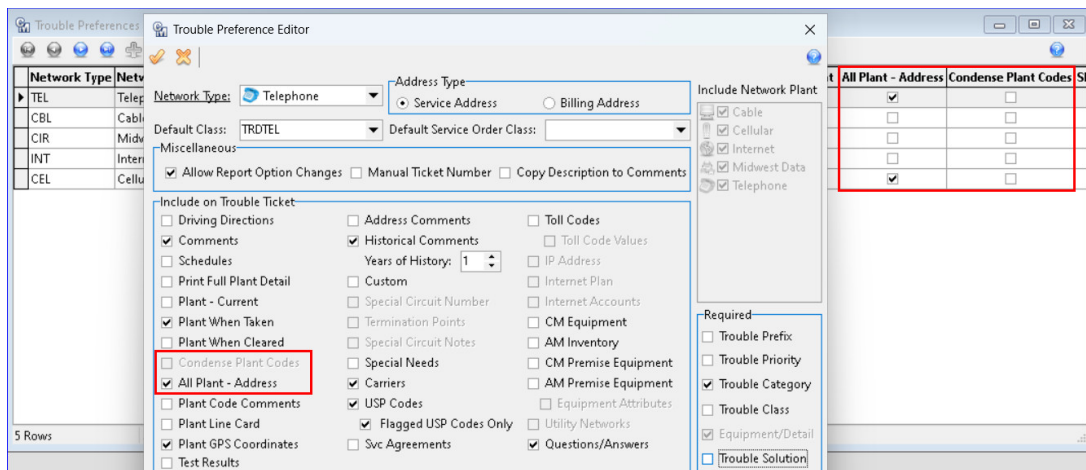
**Reports Suite | Reports | Marketing | Account Contacts:** When the Contact Options of “Include Notifications” and “View Result Verbiage” is selected as an option when running the Account Contacts report, the first 25 characters of the Text message will display in the Result Verbiage of the printed report.

# Plant on Trouble Tickets 23.1

## All/Condensed Plant Display on Trouble Tickets

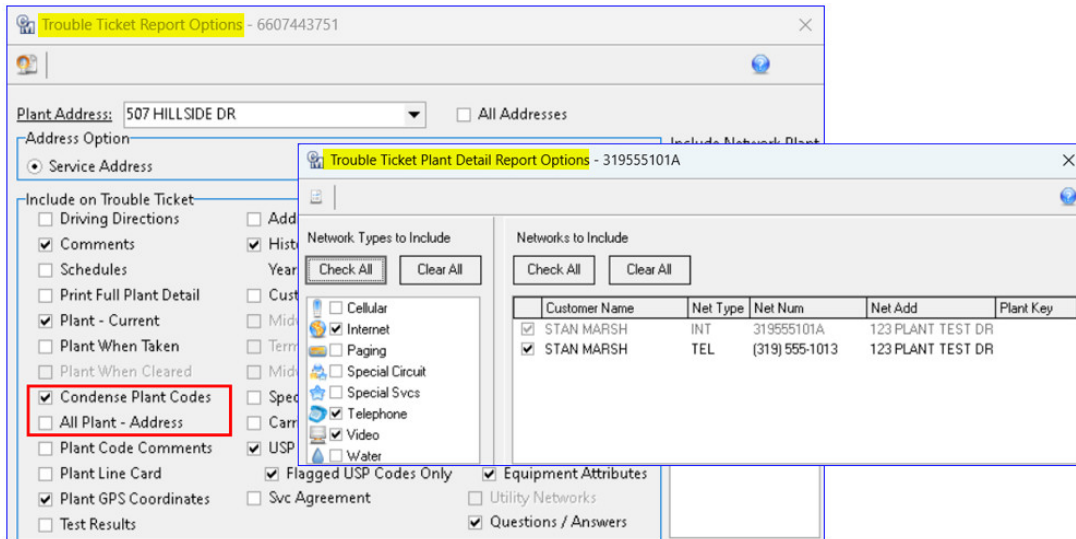
The ability to view all Plant associated with an address on printed Trouble Tickets, regardless of the network, is available with this release of Customer Master. This enhancement increases efficiency for users when accessing Trouble Tickets to display Plant from all networks in a single view.

**File | Preferences | Trouble Preferences: An “All Plant – Address”** checkbox was added to the “Include on Trouble Ticket” group box in the Trouble Preferences Editor. When checked, it will allow users to view all the Plant for an address with Plant Details on printed Trouble Tickets. In addition, a “Condense Plant Codes” checkbox was also added. When checked the Plant for network types with Plant Details assigned will display on the printed Trouble Ticket. The checkboxes were included in the Trouble Preference grid for an at-a-glance view of which networks have the options checked.



When printing a Trouble Ticket the “Trouble Ticket Report Options” screen also has the “All Plant – Address” and the “Condense Plant Codes” checkboxes for selection. When the All Plant – Address option is

checked the “Trouble Ticket Plant Detail Report Options” screen will no longer appear after printing and closing the Trouble Ticket.



All Plant – Address example: When a Trouble Ticket is printed with the “All Plant – Address” checked, all the Plant for the address with Plant Detail displays on the Trouble Ticket. Multiple Plant Codes will display on the same line. Note: The Plant displayed on the Trouble Ticket mirrors the Plant that displays for the address in Plant Search.

<b>TROUBLE TICKET 66599</b>		sklich	04/05/2023 12:21:19 PM	Page 1 of 2		
<b>Account Number</b> 449	<b>Network Type</b> Internet	<b>Network #</b> 6607443751	<b>Network Status</b>			
<b>Plant Area</b> 235744	<b>Serving Area</b>	<b>Tech Type</b>	<b>Svc Type</b>			
<b>Contact Number</b>						
<b>Customer Account</b>	ERIC OR MICHELLE ABBO	<b>Pending Serv Order</b>	169572			
<b>Network Address</b>	ERIC OR MICHELLE ABBO 07 HILLSIDE DR ROCK PORT, MO 64482 Latitude: 40.41256854 Longitude: -95.50836646	<b>In Date</b>	03/06/2003			
		<b>Out Date</b>				
		<b>Bus/Res</b> R	<b>Status</b>			
<b>Reported Trouble</b>	00499	SUSP NON-PAY				
<b>Report Taken By</b>	cpunthapa	03/14/2023 10:01:31 AM	<b>Priority</b>			
<b>Assigned To</b>						
<b>Department</b>	<b>With All Plant-Address checked</b>			<b>Category</b> CLRWW		
<b>Work Group</b>						
<b>Employee</b>						
<b>Appointment Date</b>						
<b>Canceled By</b>						
<b>Account Contact Information:</b>						
<b>Name</b>	ERIC OR MICHELLE ABBO					
<b>Phone Number</b>	(402) 533-4791					
<b>Email Address</b>	cpunthapa@maccn.net					
<b>Equipment:</b>						
<b>Manufacturer</b>	<b>Model</b>	<b>Type</b>	<b>Qty</b>	<b>Equipment ID</b>	<b>Eff. Date</b>	<b>End Date</b>
<b>Description</b>						
<b>Attributes</b>						
CALIX	803G	INTERNET	1	ONT	08/04/2022	
GPON: CXNK00B0F883						
CALIX	GS2020E	INTERNET	1	GIGASPIRE-ROUTER	08/04/2022	
MAC-60DB9877F3F8						
FSAN: CXNK00B15CD1						
<b>Plant:</b>		<b>Plant Key:</b>				
<b>Current:</b>						
<b>Code</b>	<b>Detail</b>	<b>Code</b>	<b>Detail</b>			
CABLE PAIR	1352_2667	ZHONE BLC	MALC #2 / PORT 1-15-14-0			
CABLE ROUTE	3F6A	MAP NUMBER	150.4			
LCE	1-4-18-25	WIRE CONTRACT	N_Y			
<b>Action Taken:</b>						

When a Trouble Ticket is printed without the "All Plant - Address" checked, as in previous versions of Customer Master, Plant for the network will display even if there is no Plant Detail.

<b>Plant:</b>	<b>Without All Plant-Address checked</b>			<b>Plant Key:</b>
<b>Current:</b>				
<b>Code</b>	<b>Detail</b>	<b>Code</b>	<b>Detail</b>	
CABLE PAIR	2667	ZHONE BLC		
LCE	1-4-18-25	GATEWAY LINE		
ONT SERIAL #		PORT		
ONT MODEL #		INTREGRATED DIGITAL EQUIP		
ADD CUST TO DATABASE		SERVING TERMINAL		
IP ADDRESS		MST PORT		
NETMASK INFORMATION		MST		
GATEWAY INFORMATION		LINE		
DNS INFORMATION		FIBER NUMBER		
RADIO & SERIAL NUMBER		CABINET		
GATEWAY				

Condensed example: When a Trouble Ticket is printed with "Condensed" checked, all the Plant for the network type with Plant Detail assigned to the network will display.

<b>Plant:</b>	<b>With Condensed checked</b>	<b>Plant Key:</b>	
<b>When Taken:</b>			
<b>Code</b>	<b>Detail</b>	<b>Code</b>	<b>Detail</b>
CABLE PAIR	2667	CABLE ROUTE	3F6A
LCE	1-4-18-25	WIRE CONTRACT	Y
MAP NUMBER	150.4	ZHONE BLC	MALC #2 / PORT 1-15-14-0
<b>Action Taken:</b>	_____		

When a Trouble Ticket is printed without "Condensed" checked, all Plant Codes for network type, including codes that do not have Plant Detail assigned to the network will display.

<b>Code</b>	<b>Detail</b>	<b>Code</b>	<b>Detail</b>
CABLE PAIR	2667	REMOTE DIG TERM CABLE PAIR	
LCE	1-4-18-25	DIG CABLE PAIR	
MAP NUMBER	150.4	GATEWAY INFORMATION	
ADDRESS		GATEWAY	
CABLE ROUTE	3F6A	ZHONE BLC	MALC #2 / PORT 1-15-14-0
WIRE CONTRACT	Y	GATEWAY LINE	
ONT SERIAL #		PORT	
ONT MODEL #		INTREGATED DIGITAL EQUIP	
RST 1		SERVING TERMINAL	
F1 SEGMENT		MST PORT	
F2 SEGMENT		MST	
F3 SEGMENT		LINE	
SEW. TERM		FIBER NUMBER	
CENTRAL OFFICE DIG TERM		CABINET	
REMOTE DIG TERM			
		<b>Without Condensed checked</b>	
<b>Action Taken:</b>	_____		

# Technology Upgrade 23.1

In 23.1, Customer Master made changes within all screens to accommodate Microsoft Windows' new default font. The font and sizing changed from Tahoma - 8 to Segoe UI - 9. MACC also converted its components from ADO to FireDAC. The new FireDAC components will allow MACC to use modern technologies in the future and maintain a more up-to-date product. While FireDAC is not a visual change, the result of this conversion will increase processing speed and performance within the software.

# Utility Billing 23.1

## New Utility Billing Feature

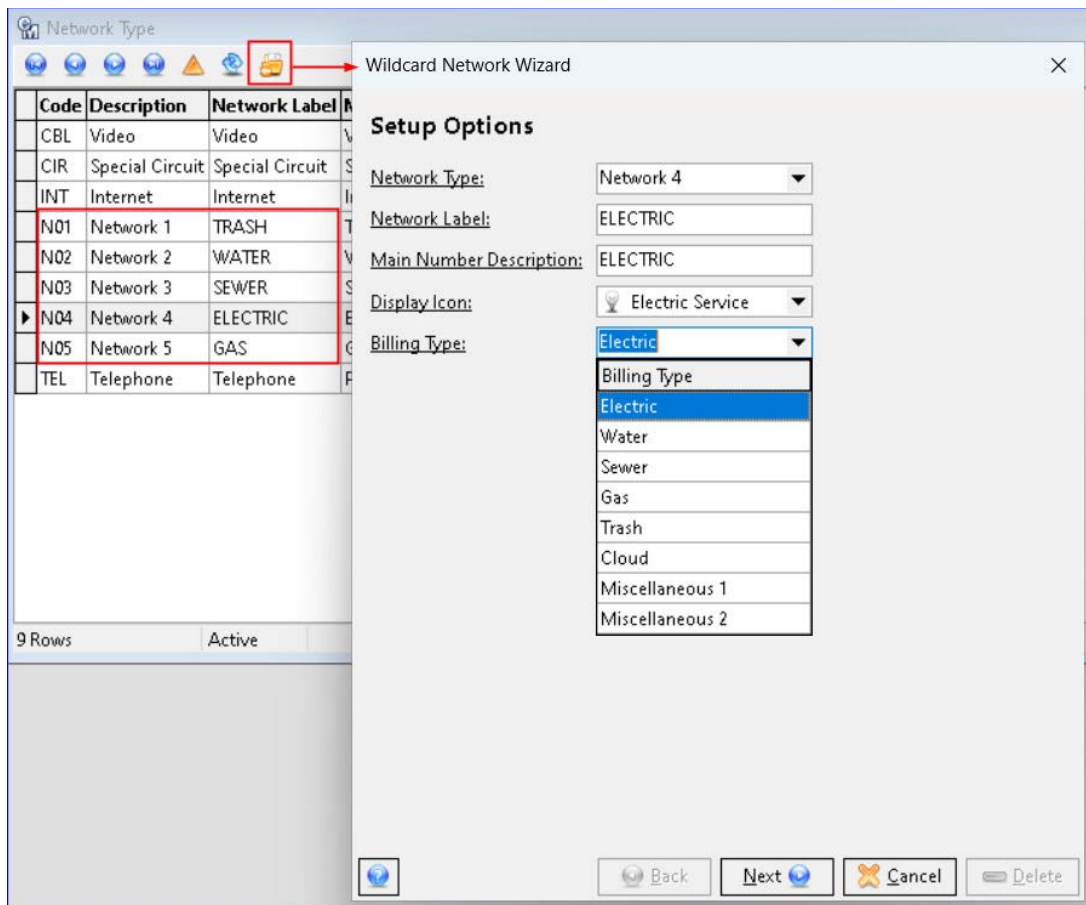
With new functionality added in version 23.1, public utilities can now use Customer Master to bill for electricity, gas, water, sewer, and trash, in addition to communication services. Adding utility billing to Customer Master can be accomplished with minimal set up and all services (utilities and communications) can be included on one bill. If you are interested in utility billing, please contact your Client Solutions Manager.

### **WILDCARD NETWORK WIZARD**

**File | Preferences | Network Type Preferences:** A “Wildcard Network Wizard” icon was added to the Network Type Preferences screen and is used to set up wildcard network data fields for utility-based networks such as Electric, Gas, Water, Sewer, and Trash. When accessed, users will advance through the wizard to select specific fields to be included in their Wildcard Network(s.) The first screen of the wizard contains Setup Options. In our example, we will focus on an Electric Wildcard Network setup.

**Setup Options:** The “Network Type,” “Network Label,” “Main Number Description,” and “Display Icon” fields will auto-populate based on the selected network in the grid when the wizard is opened. A Billing Type must be selected and will appear as a node below the network in the Service Order/Sales Lead. “Back,” “Next,” and “Cancel” buttons at the bottom of the Wizard screen can be used to move back a screen, move to the next screen, or cancel the changes.





**Network Field Selections:** Clicking “Next” will advance the user to the “Network Field Selections” screen of the wizard. Users will be able to check specific wildcard network fields to be present for the network node in the Service Order/Sales Lead. A “Required” checkbox to the right of each field selection can be checked to make the field on the Wildcard Network node required.

Wildcard Network Wizard

### Network Field Selections - Electric

<input checked="" type="checkbox"/> Read Dates	<input checked="" type="checkbox"/> Required	<b>Meter Information</b>	
<input checked="" type="checkbox"/> Usage USP	<input checked="" type="checkbox"/> Required	<input checked="" type="checkbox"/> ERT ID	<input checked="" type="checkbox"/> Required
<input checked="" type="checkbox"/> Previous Meter Read	<input checked="" type="checkbox"/> Required	<input checked="" type="checkbox"/> Meter Make	<input checked="" type="checkbox"/> Required
<input checked="" type="checkbox"/> Current Meter Read	<input checked="" type="checkbox"/> Required	<input checked="" type="checkbox"/> Tamper CD	<input type="checkbox"/> Required
<input checked="" type="checkbox"/> Multiplier	<input checked="" type="checkbox"/> Required	<input checked="" type="checkbox"/> Meter Type	<input checked="" type="checkbox"/> Required
<input type="checkbox"/> Consumption	<input type="checkbox"/> Required	<input checked="" type="checkbox"/> Read Method	<input checked="" type="checkbox"/> Required
<input checked="" type="checkbox"/> Inactive		<input checked="" type="checkbox"/> Serial Number	<input checked="" type="checkbox"/> Required
		<input checked="" type="checkbox"/> Read Sequence Number	<input checked="" type="checkbox"/> Required

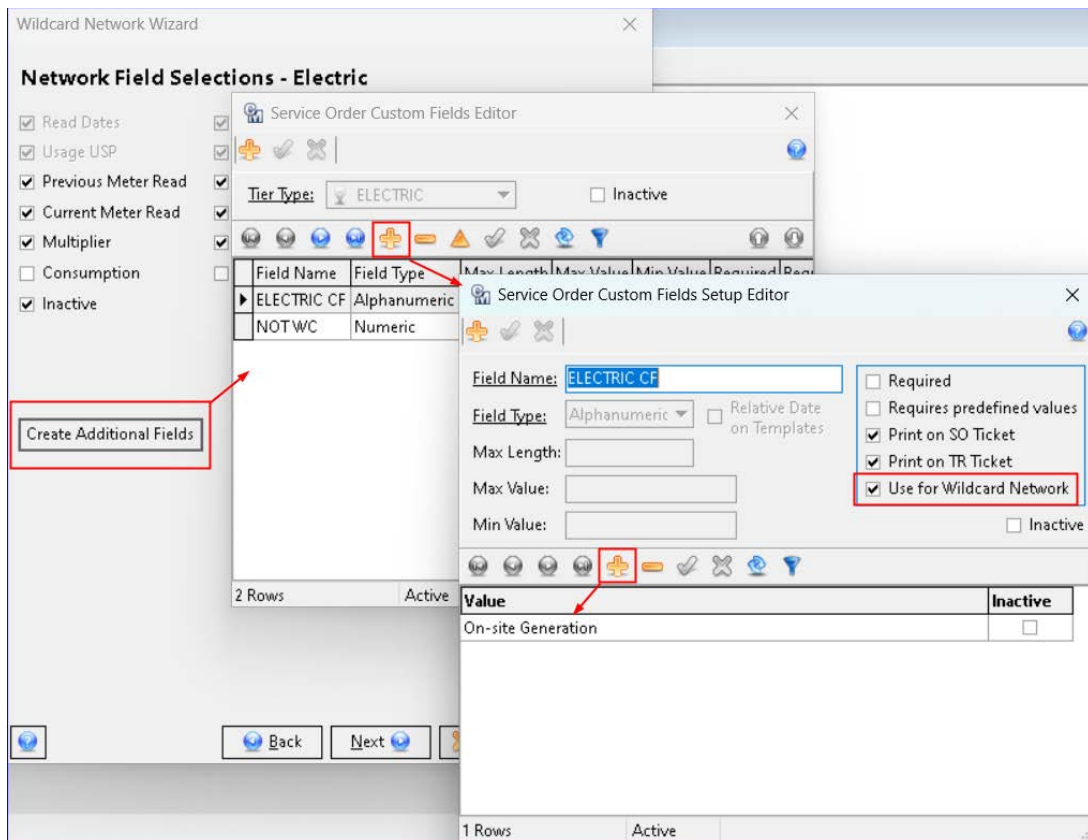
**Demands Customers**

<input checked="" type="checkbox"/> Demand Meter Type	<input type="checkbox"/> Required
<input checked="" type="checkbox"/> Demand Multiplier	
<input checked="" type="checkbox"/> Demand USP	

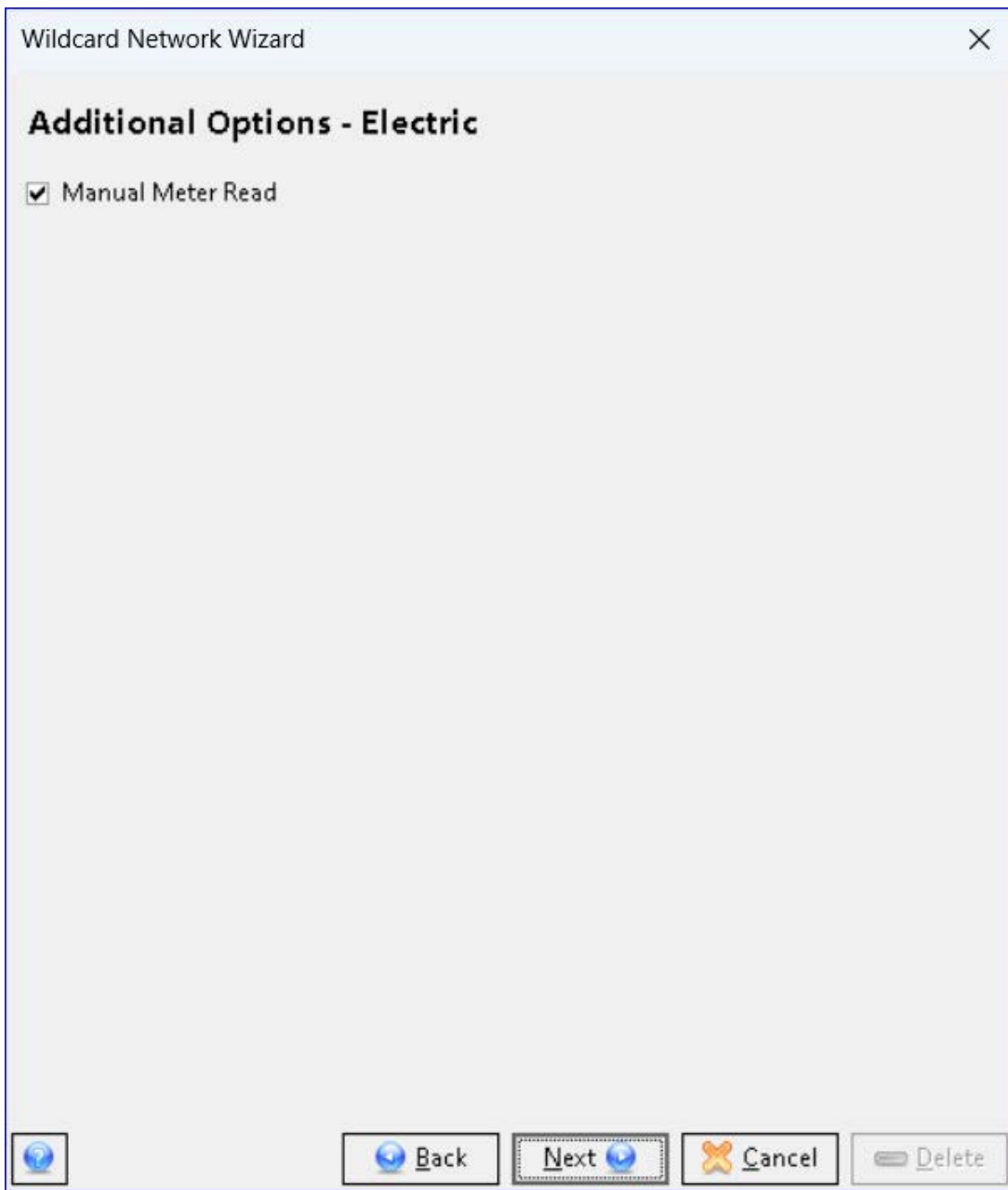
**Create Additional Fields**

Back Next Cancel Delete

**Create Additional Fields button:** Each wildcard network node selection for Electric, Water, Sewer, Gas, and Trash will have the ability to create additional fields to be used on the wildcard network node in the Service Order/Sales Lead. These additional fields are user-defined and will appear on the wildcard network node along with the selected wildcard network fields. A "Use for Wildcard Network" check box option can be checked so the additional field(s) will display at the wildcard network node established through the Wildcard Network Wizard. When unchecked, the additional field will appear on the "Custom node" in the Service Order for the selected tier.



**Additional Options:** Clicking “Next” will advance the user to the “Additional Options” screen of the wizard. A “Manual Meter Read” checkbox option is available to include on the Wildcard Network node, along with the selected fields. When checked, it will indicate the account needs a manual meter read and is only available for Electric, Water, Sewer, and Gas Wildcard network types.



**Screen Layout:** Clicking “Next” will advance the user to the “Screen Layout” section of the wizard. The field selections from the “Network Field Selections” screen appear on this screen. Although not required, users can move the fields in this screen to arrange them the way they want them to appear on the utility node of the Service Order/Sales Lead. The Back, Finish, and Cancel buttons at the bottom of the Wizard screen allow the user to move back a screen, finish the Wizard selections, or cancel the changes.

Wildcard Network Wizard

### Screen Layout - Electric

Usage USP:

Current Read Date:

Previous Read Date:

Meter Make:  Meter Type:

Current Meter Read:

Previous Meter Read:

Demand Meter Type:

Demand Multiplier:

Demand USP:

ELECTRIC CF:

Manual Meter Read:

Inactive:

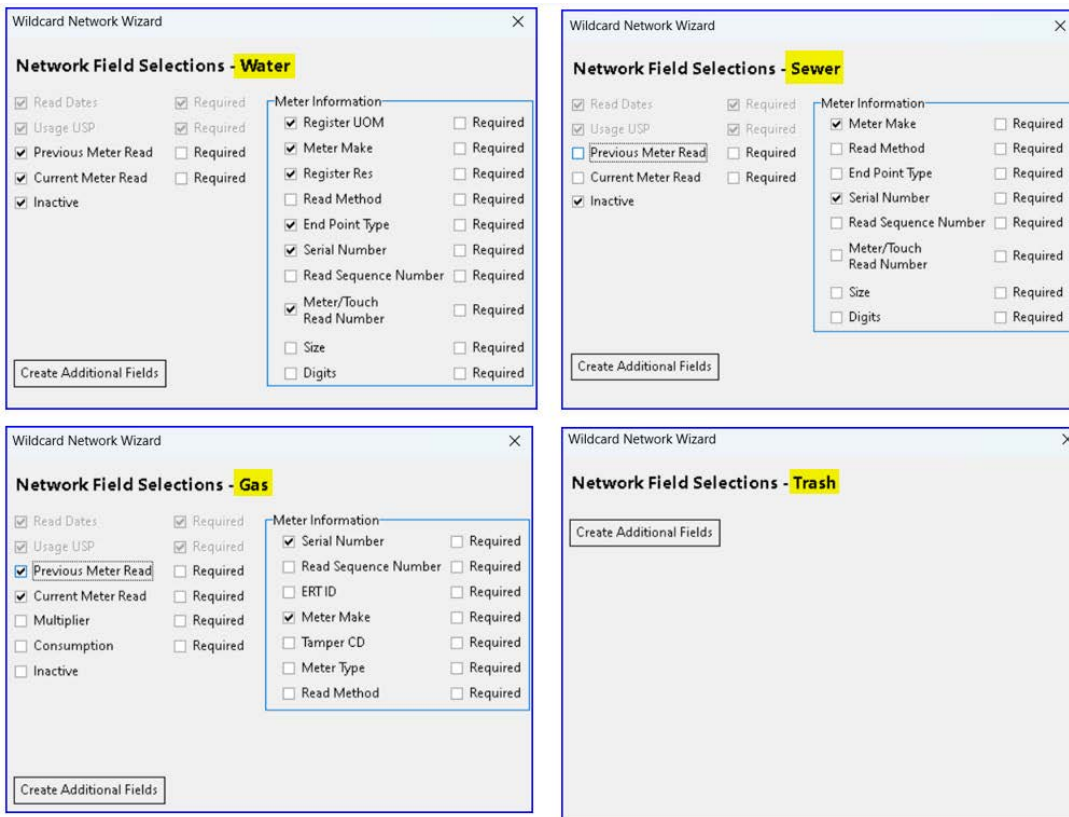
ERT ID:

Read Method:

Serial Number:

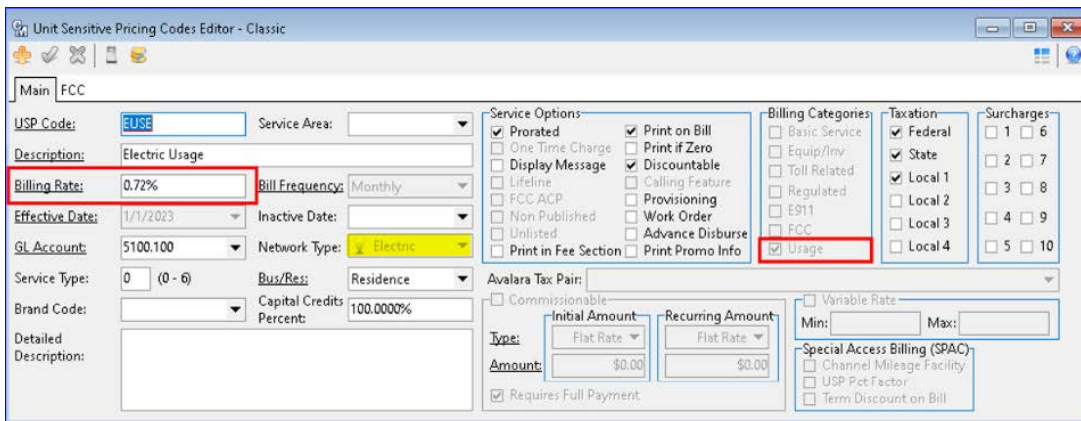
Layout: Click/Drag on field label to reposition.

**Other Utility-based Wildcard Network Field Selections:** In addition to an Electric network for Utility Billing, below are examples of the “Network Field Selections” screen in the Wizard for Water, Sewer, Gas, and Trash setups. The Network Field Selections screen for a Trash network only contains the “Create Additional Fields” button for users to set up their own network fields.



## MAINTENANCE

**Maintenance | Common | USP:** Once wildcard networks for Utility Billing are activated, and have been selected from the Network Type drop-down, a Billing Category of "Usage" is available for selection in the Billing Category group box in the USP Code Editor. Check the Usage category to establish a USP code for utility-specific wildcard networks. When Usage is flagged the Billing Amount field caption changes to "Billing Rate," and the value changes from currency to percentage.



**Maintenance | Common | Main Report Area:** A "Utility Assistance

Journal Entries” group box was added to the Main Report Area Editor screen. A grid inside the group box displays Wildcard Network Types set up through the Wildcard Network Wizard to be used for Utility Billing. Grid columns include “Network Type,” “Cash Debit G/L Account,” “Acct Rec Credit G/L Acct,” and “Utility Assist Credit G/L.” When populated, it will create a debit to the Cash GL and credit the Utility Assist GL when Utility Assistance funds are exported using the Export Cash Journal Entry process. During Step 3 of the billing process, the utility assistance amount will debit to the Accts Rec GL and credit to the revenue GLs. During Step 9 of the billing process, there will be a debit to the Utility Assist GL and a credit to the Accts Rec GL.



Main Report Area Editor

Main Report Area Code: BMRA Inactive Date: [ ]

Description: BLAIR MAIN REPORT AREA

Accounting Company: [ ]

Journal Entry By Report Area

Default Carrier G/L Acct: 0000.0114 Billing JE G/L Acct: 0000.0000

Receivables Journal Entries

Cash Debit G/L Acct: 0000.0394 Cash JE Export MRA Override Main Report Area: [ ]

Acct Rec Credit G/L Acct: 0000.0116

Security Deposit Credit G/L Acct: [ ]

Cash JE by Deposit Accounting Co: Not Used

Inter-Company Accts Rec G/L Acct: [ ]

Inter-Company Accts Payable G/L Acct: [ ]

(Override the Company set up)

Utility Assistance Journal Entries

Network Type	Cash Debit G/L Acct	Acct Rec Credit G/L Acct	Utility Assist Cre
TRASH	0000.0000	0000.0070	0000.0071
WATER	0000.0000	0000.0070	0000.0071
SEWER	G/L Acct	Description	
ELECTRIC	0000.0000		
Logo:	0000.0000		
Accounting Master	0000.0040		
	0000.0070		
Accounting Master	0000.0071		
Materials Comp	0000.0086		
Work Order OCC	0000.0114		
	0000.0116		

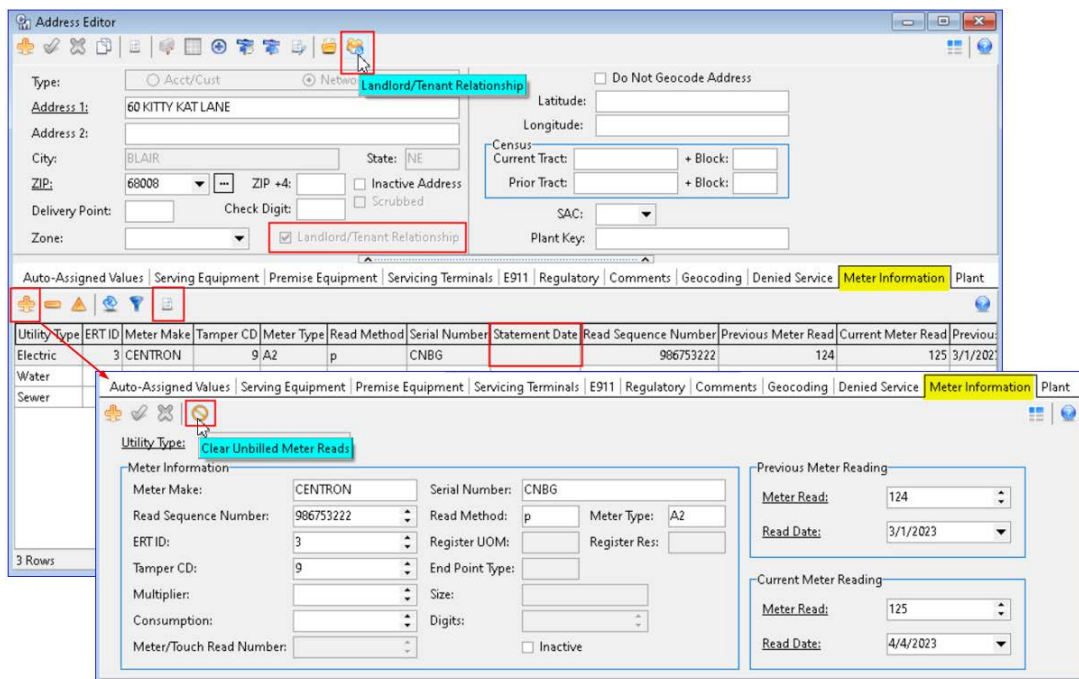
**Maintenance | Common | Address | Address:** A new tab for "Meter Information" was added to the Network Address Editor screen. The grid and editor display all associated wildcard network's meter details. Toolbar icons provide the functionality to Insert, Delete, Edit, Refresh, Status Filter, and to generate a report to view "History." A "Statement Date" column in the Meter Information grid will populate when meter information has been sent in for billing and indicates the meter is no longer editable.



Adding or editing meter information will open an additional editor to enter the Meter information, Previous and Current Meter Reads, and Date. A “Clear Unbilled Meter Reads” icon can be used to change a current meter read back to the latest billed read or delete unbilled history records.

A checkbox for the “Landlord/Tenant Relationship” is view-only and will be checked if a “Landlord/Tenant” record exists on the “Landlord/Tenant Relationship” screen for the address.

A button on the toolbar to access the “Landlord/Tenant Relationship” screen will only be enabled for Network addresses with a record in the “Landlord/Tenant Relationship” maintenance screen. When accessed, the “Landlord/Tenant Relationship” screen will open and automatically filter to that unique address to view the Landlord/Tenant relationship.



**File | Preferences | Network Category:** When Utility-based Wildcard Networks are activated new Billing Category rows are added in the Network Category Preferences screen. All utility usage from the wildcard networks marked as a utility will bill to the new billing category of “Usage” (802, 812, 822, 832, 842, etc.) for all Wildcard Networks. Electric (Basic/Non-Basic) and Usage categories are available for the application of utility assistance funds. A checkbox option captioned “Use for Utility Assistance” was added to the Network

Category Editor as well as the grid. When checked, the categories will be included when Utility Assistance funds are being applied to the network. When viewing an electric, water, and/or sewer bill, users will be able to view the Read Dates, Previous and Current Meter Reads, and Total Usage under the appropriate wildcard networks.

Category	Type	Description	User Description	Changed By	Change Date	Use for Utility Assistance
801	N01	EQUIP/INV NET 1	EQUIP/INV NET 1	jjensen1	12/20/2022 6:50:42 AM	<input type="checkbox"/>
802	N01	USAGE NET 1	USAGE NET 1	CM 23.1 Upgrade	2/17/2023 9:01:35 PM	<input type="checkbox"/>
810	N02	Network 2	WATER	iiensen1	4/3/2023 12:35:57 PM	<input checked="" type="checkbox"/>
811	N02	EQUIP/INV NET 2				<input type="checkbox"/>
812	N02	USAGE NET 2				<input checked="" type="checkbox"/>
820	N03	Network 3				<input type="checkbox"/>
821	N03	EQUIP/INV NET 3				<input type="checkbox"/>
822	N03	USAGE NET 3				<input type="checkbox"/>
830	N04	Network 4				<input checked="" type="checkbox"/>
831	N04	EQUIP/INV NET 4				<input type="checkbox"/>
832	N04	USAGE NET 4				<input checked="" type="checkbox"/>
840	N05	Network 5				<input type="checkbox"/>
841	N05	EQUIP/INV NET 5	EQUIP/INV NET 5	blockhart	1/6/2023 12:43:16 PM	<input type="checkbox"/>
842	N05	USAGE NET 5	USAGE NET 5	CM 23.1 Upgrade	2/17/2023 9:01:35 PM	<input type="checkbox"/>
9999		MISCELLANEOUS	MISCELLANEOUS	anne	2/25/2008 10:49:34 AM	<input type="checkbox"/>

Category:	830	<input checked="" type="checkbox"/> Use for Utility Assistance
Network Type:	N04	
Description:	Network 4	
User Description:	ELECTRIC	

**Maintenance | Receivables | Utility Assistance:** A new maintenance table for Utility Assistance can be used to enter a company's received Energy (Utility) Assistance funds for a given account. This will allow users to allocate assistance funds to a specific network tier, and when billing is processed, the fund's balance will be decreased and applied to the selected network tier's billing categories. The Utility Assistance Maintenance screen can also be accessed from the Receivables suite | Maintenance. Utility Assistance is calculated during Step 3 of billing.

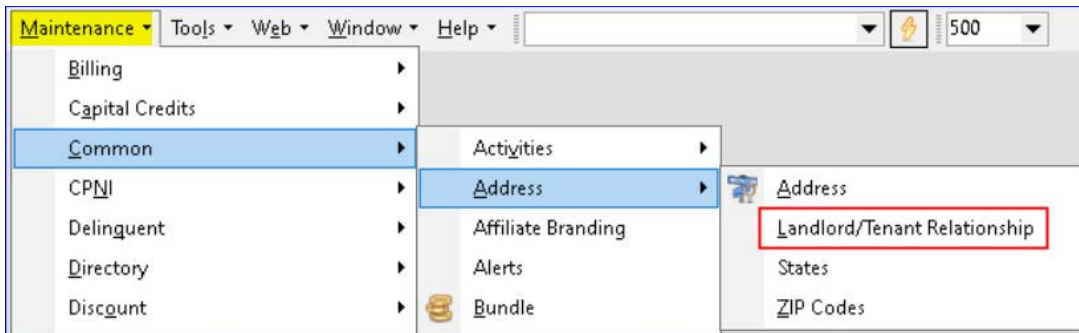
Funding Year	Acco	Active	Description	Funding Amount	Funding Balance	Last Funding Adj. Date	Batch Name	Returned Funds	Returned Funds Amount	Returned Funds Date	Canceled	Entered By	Entry Date	Exported By	Export Date
2023	KARE	Paid Off	UA ELEC TEST	\$950.00	\$950.00	4/11/2023	04122023j	<input type="checkbox"/>			<input type="checkbox"/>	jjensen1	4/11/2023 10:17:13 AM		
2023	KARE	Canceled	UA ELEC TEST	\$950.00	\$950.00	4/11/2023	04122023j	<input type="checkbox"/>			<input type="checkbox"/>	jjensen1	4/12/2023 1:31:48 PM		
2023	CAM	Returned	UA ELECTRIC					<input type="checkbox"/>			<input type="checkbox"/>	jjensen1	4/12/2023 2:00:54 PM		
2023	ADAI	All	UA FOUR NETWORKS					<input type="checkbox"/>			<input type="checkbox"/>	jjensen1	4/12/2023 3:28:16 PM		

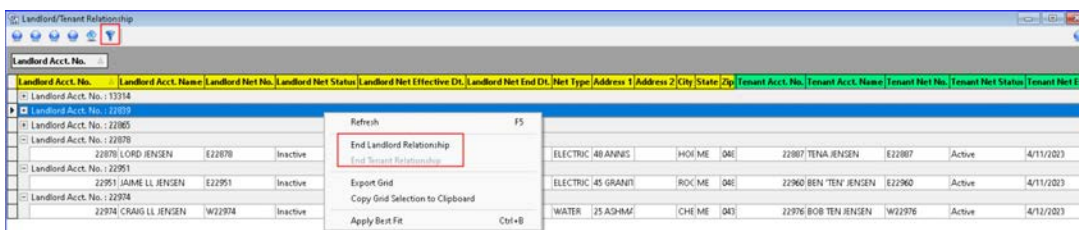
Funding Year:	2023	Accounts:	KAREN JENSEN	Network:	EB
Description:	UA ELEC TEST	Funding Amount:	\$950.00	Funding Balance:	\$950.00
Last Funding Adjustment Date:	4/11/2023	Batch Name:	04122023j	Exported By:	
Exported By:		Export Date:		Export Batch Name:	
Returned Funds:	<input type="checkbox"/>	Returned Funds Amount:	\$0.00	Return Date:	

## Maintenance | Common | Address | Landlord/Tenant Relationship:

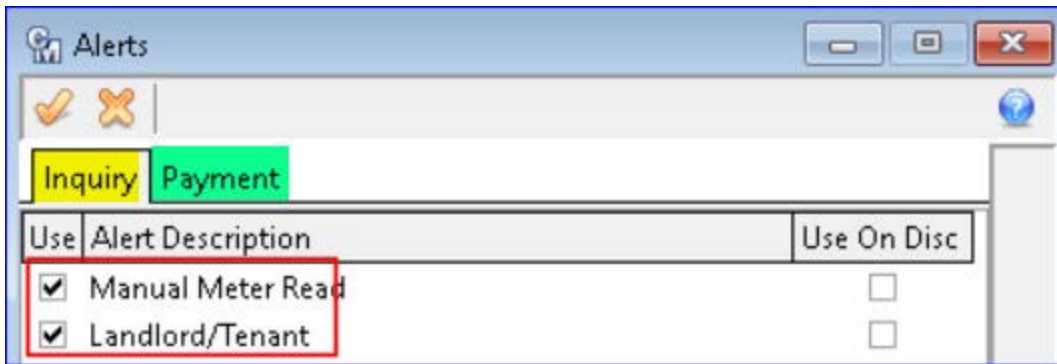
A new Maintenance screen has been created to display Landlord/Tenant relationships. The screen will also be available from the Address Suite.



When selected, the “Landlord/Tenant Relationships” grid opens to view the Landlord and Tenant information. The grid can be filtered by active/inactive/all, and a right-click option in the grid allows users to “End Landlord Relationship” or “End Tenant Relationship.”

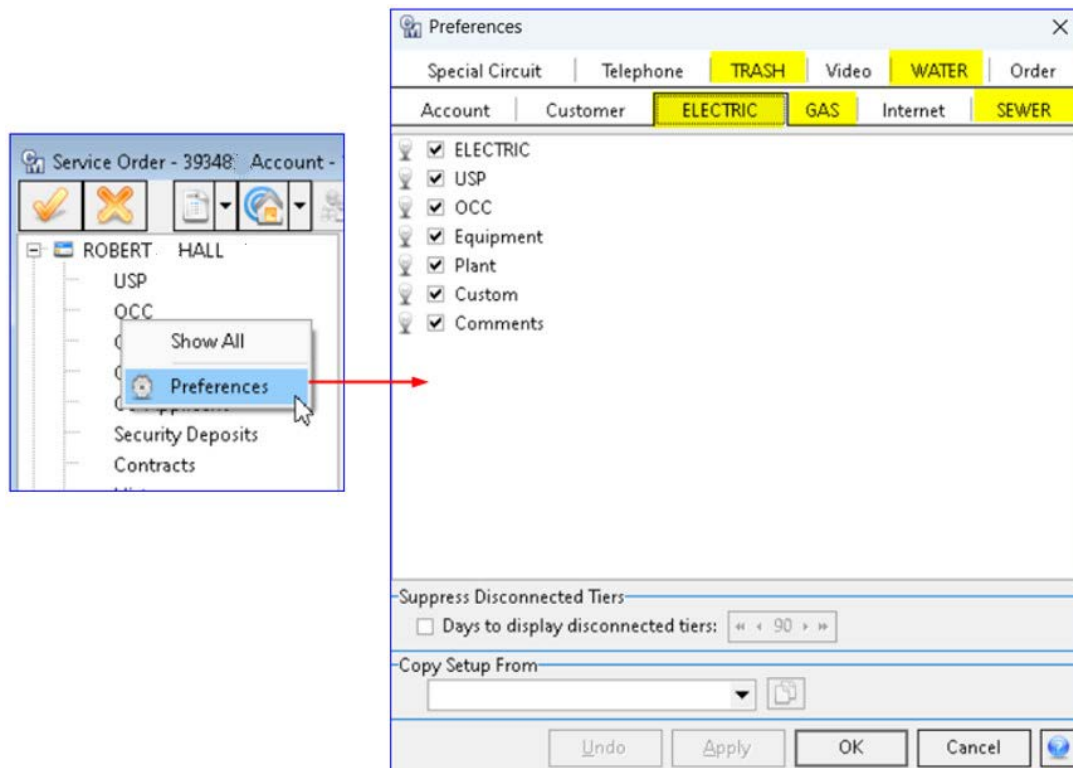


**Maintenance | Common | Alerts:** A Manual Meter Read checkbox was added to the Inquiry and Payment Alerts in the Alerts maintenance table. Manual Meter Read Alerts will display in the Alerts group box in Inquiry and Payment Entry. If the Alert checkbox is checked, the option is selected in the wildcard wizard and checked on the wildcard network node in a service order. A Landlord/Tenant Alert was also added and will display in Inquiry and Payment Entry for those accounts flagged as a Landlord or a Tenant.



## SERVICE ORDER/SALES LEAD

**Service Order/Sales Lead – New Install and Existing Accounts:** When Utility-based Wildcard Network wizard selections are complete, the selected fields will be available in Service Orders/Sales Leads for the associated Utility Network node. The Utility network nodes were added to the Service Order Preferences (right-click in the service order tree view to access). Users can select the Wildcard Network Nodes for the activated wildcard networks.



In a Service Order or Sales Lead, the Utility node will appear below the network in the Service Order/Sales Lead, like Telephone and Internet nodes, and will use the layout defined in the Wildcard Network Wizard.

The Meter Information associated with the network's assigned address will display and is read-only/gray. Any additional or custom fields set up in the wizard will also display.

**ELECTRIC**

Usage USP: \*ELEC - ELECTRIC

Current Read Date: 1/31/2023

Previous Read Date: 12/30/2022

Meter Make: CENTRON Meter Type: A2

Current Meter Read: 17034

Previous Meter Read: 14720

Demand Meter Type: Regular

Demand Multiplier: 1

Demand USP: \*DUU - DEMAND USAGE USP

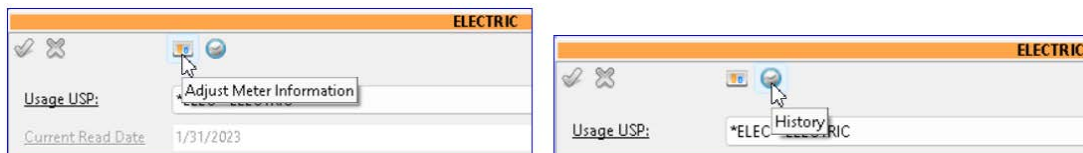
**ELECTRIC CF** On-site Generation

Manual Meter Read:

Inactive:

**Custom Field**

An "Adjust Meter Information" button on the Utility node toolbar links to the "Meter Information" tab in the Address Editor to insert readings, edit meter information, and view history. Selecting the "History" button on the Wildcard Network Node will display the customer's recent (13 months) meter history across addresses.



**Print Service Order:** A Utility Networks checkbox was added to the Network section of the Service Order Ticket Options screen. When

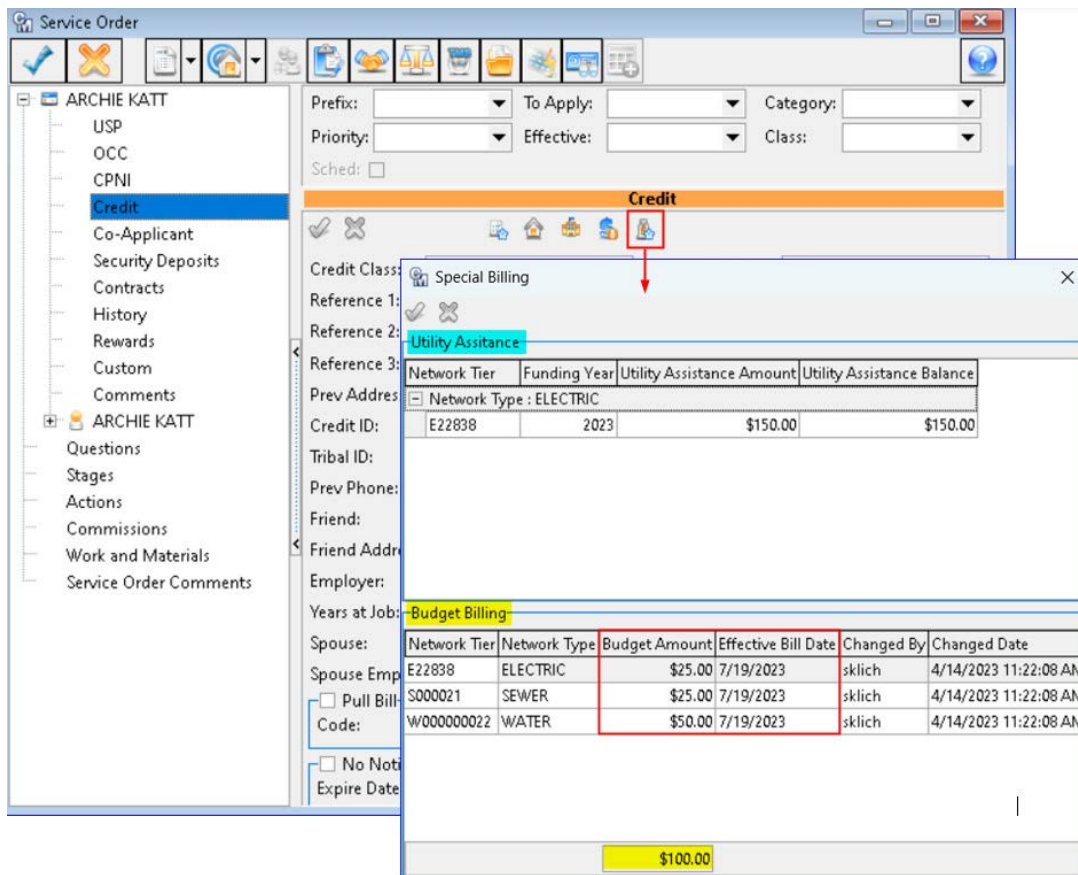
checked, wildcard network selected fields, additional fields, and additional options will print on the Service Order/Sales Lead under the wildcard network section.

The screenshot shows the 'Service Order Ticket Options' window. The main area displays network information for 'Electric' network 785, including address (854 BUZZELL HILL RD, HOPE, ME 04847), coordinates, and a description (ROBERT HALL). A 'Plant Key' field is highlighted with a red box and an arrow pointing to the 'ELECTRIC' field in the 'ELECTRIC Fields' table. The table lists various field names and their values, such as 'Meter Make' (CENTRON), 'Meter Type' (A2), and 'Demand Multiplier' (1). A 'CC#' field is also visible.

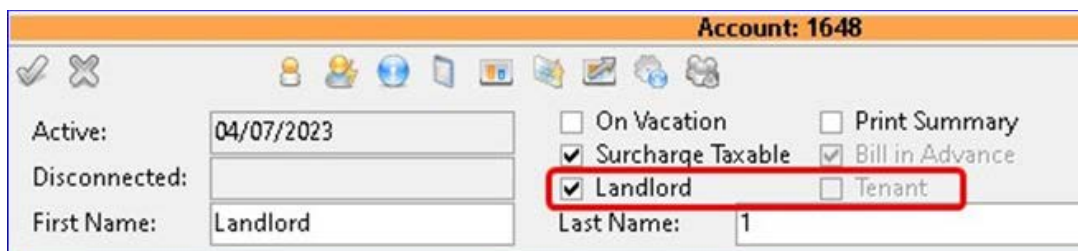
Field Name	Field Value
Meter Make	CENTRON
Meter Type	A2
Previous Meter Read	14720
Current Meter Read	17034
Previous Read Date	12/30/2022
Current Read Date	01/31/2023
Inactive	N
Demand Meter Type	R
Demand Multiplier	1
Demand USP	*DUU - DEMAND USAGE USP
Manual Meter Read	N
Usage USP	*ELEC - ELECTRIC
ELECTRIC	On-site Generation

**Service Order | Credit Node and Network Node:** A new icon was added to the Credit screen labeled "Special Billing." The Special Billing icon is also available on the toolbar for all network tiers. The Special Billing window includes a Utility Assistance grid and a Budget Billing grid. The Utility Assistance grid is a view only list of utility accounts, while the "Budget Amount" and "Effective Bill Date" columns in the Budget Billing grid can be edited. The grid displays the Budget Amount for each Network tier and users can do a manual true-up to adjust next year's budget billing as needed. Entries are effective immediately and not dependent on applying the Service Order. The total budget amount will be displayed at the bottom of the screen. Special Billing can also be accessed from a drop-down on the Payment entry icon on the Inquiry screen.





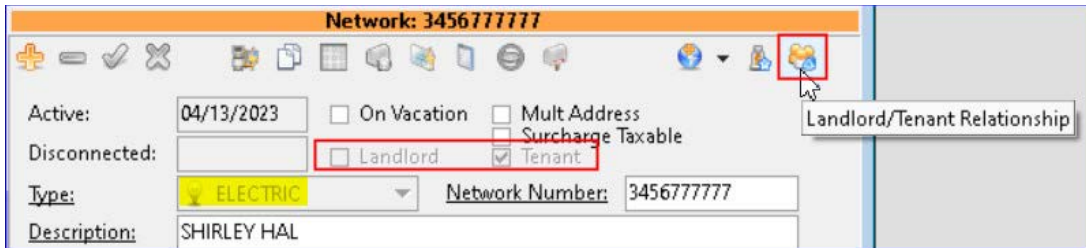
**Service Order | Utility Network | Landlord/Tenant:** Landlord and Tenant checkboxes are available on the Account and Network tiers in the Service Order to be used with Utility-based Wildcard Networks. At the Account node the Landlord checkbox will always be enabled to set the Account as a Landlord and the Tenant Flag will be checked if any of the Account's network tiers are flagged as a Tenant. When the Service Order is applied all utility network addresses become landlord addresses in the "Landlord/Tenant Relationship" maintenance table.



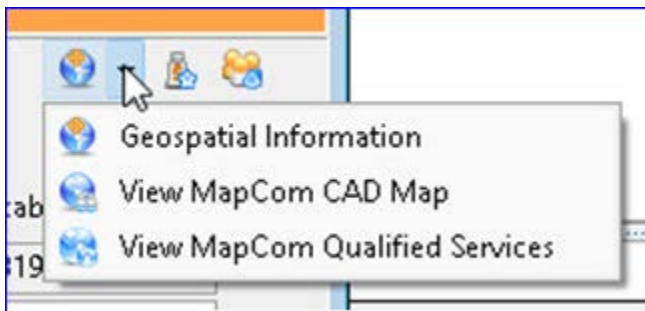
At the Network node the Landlord box will be checked if the network address is a "Landlord" address, the network is disconnected, and if the flag is checked. The Tenant box will be checked if the network address

is a “Landlord” address and the Landlord’s address for that network is disconnected.

A button labeled “Landlord/Tenant Relationship” was also added to the Utility Network Tier’s toolbar. It is enabled if the account is flagged as a Landlord or the tier is a Tenant. Clicking the button opens the new “Landlord/Tenant Relationships” maintenance table filtered to the selected Landlord/Tenant.



In addition, the GPS/MapCom buttons were condensed into a single dropdown. If all three geospatial options are being utilized, they will now be accessed from the drop-down instead of the toolbar.



## BILLING

**Packages | Billing | Bill Cycle Process:** When processing billing with Utility networks, MACC recommends companies who want to utilize Utility billing and do not have Telephone or Wireless networks, use the Combined Billing option to speed up billing. Clicking Step One in the Billing Process screen will complete both Step One and Step Two and no Toll processing will take place. Note: Call your Software Support Representative at MACC for assistance enabling Combined Billing.



Step	Description	Run Date And Time	Run By
<b>Toll Cut</b>			
1	Format & Export Toll Cut-Off Data	02/22/2023 10:56:08 AM	DACorey
2	Upload Toll Cut-Off Data to MACC	02/22/2023 10:56:08 AM	DACorey
<b>Bill Cut</b>			
3	Format & Export Bill Cut-Off Data		

Visit us on the web for more information  
[www.maccnet.com](http://www.maccnet.com)

For All Billing Inquiries, call **402-533-6200**

Account Number: 0000022822  
Account Name: GRETA JENS  
Bill Date: June 19, 2023  
Due Date: 07/19/2023

### Account Summary

Last Month

last statement	49.24
Balance Due	\$49.24
Unpaid Balance if Paid	


This Month

ELECTRIC Charges	70.00
ELECTRIC Taxes, Surcharges, & Fees	2.90
Subtotal Current Charges	\$72.90
Previous Balance	\$49.24
<b>Total Amount Due</b>	<b>\$122.14</b>

Utility Assistance is calculated during Step 3 of billing. During the Retrieval Process, the Utility Assistance balance specified in Special Billing on the Account will deduct from the remaining balance after each month's network tier/categories from the Funding Amount during Step 8 of the billing process.

Current ELECTRIC Service						
ELECTRIC ID E001 AIDEN JENSEN						
Monthly Usage						
Service	Current	Previous	Usage	Qty	Amount	Total
Charges for 05/19/23 - 06/18/23 - 1 MONTH USP TEST				1	20.00	20.00
Reading Dates 04/25/2023 to 06/18/2023 ELECTRIC	11	10	1			50.00
Other Charges & Credits						
Description				Qty	Amount	Total
ASSISTANCE - ELECTRIC				1	50.00CR	50.00CR
ASSISTANCE - USP TEST				1	20.00CR	20.00CR
OCC TEST				1	10.00	10.00
Subtotal Monthly Usage						\$10.00

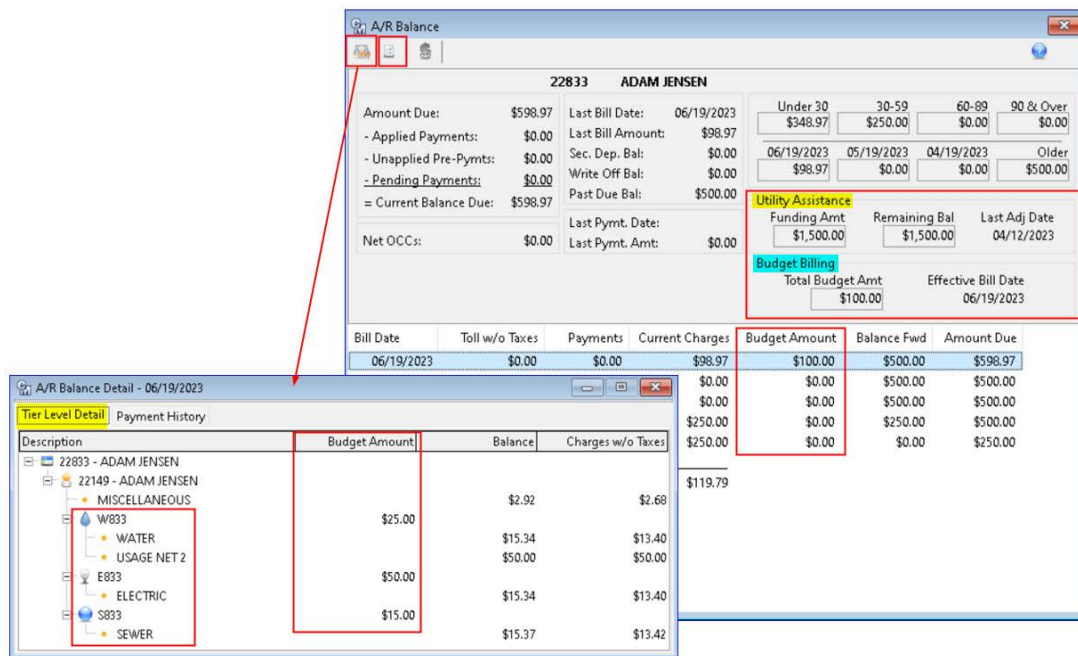
When a Budget Billing customer is billed, the bill shows the actual usage and charges but adjusts the total amount due to the budget amount. The customer also sees their Total balance (actual).

<p><b>SuccessTel</b>  <b>111 Admiral Dr</b>  <b>Blair NE 68008</b></p>  <p>Visit us on the web for more information  <a href="http://www.maccnet.com">www.maccnet.com</a></p> <p>For All Billing Inquiries, call <b>402-533-6200</b></p> <p>Account Number: 0000022830  Account Name: FRANK JENS  Bill Date: June 19, 2023  Due Date: 07/19/2023</p>	<p><b>Account Summary</b></p> <p><b>Last Month</b></p> <hr/> <table> <tr> <td>Balance from last statement</td> <td style="text-align: right;">159.54</td> </tr> <tr> <td>Previous Balance Due</td> <td style="text-align: right;">\$159.54</td> </tr> <tr> <td colspan="2">Please disregard Unpaid Balance if Paid</td> </tr> </table> <hr/> <p><b>This Month</b></p> <hr/> <table> <tr> <td>Telephone Charges</td> <td style="text-align: right;">30.00</td> </tr> <tr> <td>Telephone Taxes, Surcharges, &amp; Fees</td> <td style="text-align: right;">4.35</td> </tr> <tr> <td>SEWER Charges</td> <td style="text-align: right;">70.00</td> </tr> <tr> <td>SEWER Taxes, Surcharges, &amp; Fees</td> <td style="text-align: right;">2.90</td> </tr> <tr> <td>Subtotal Current Charges</td> <td style="text-align: right;">\$107.25</td> </tr> <tr> <td>Previous Balance</td> <td style="text-align: right;">\$159.54</td> </tr> <tr> <td><b>BUDGET AMOUNT DUE</b></td> <td style="text-align: right;"><b>\$225.00</b></td> </tr> </table>	Balance from last statement	159.54	Previous Balance Due	\$159.54	Please disregard Unpaid Balance if Paid		Telephone Charges	30.00	Telephone Taxes, Surcharges, & Fees	4.35	SEWER Charges	70.00	SEWER Taxes, Surcharges, & Fees	2.90	Subtotal Current Charges	\$107.25	Previous Balance	\$159.54	<b>BUDGET AMOUNT DUE</b>	<b>\$225.00</b>
	Balance from last statement	159.54																			
Previous Balance Due	\$159.54																				
Please disregard Unpaid Balance if Paid																					
Telephone Charges	30.00																				
Telephone Taxes, Surcharges, & Fees	4.35																				
SEWER Charges	70.00																				
SEWER Taxes, Surcharges, & Fees	2.90																				
Subtotal Current Charges	\$107.25																				
Previous Balance	\$159.54																				
<b>BUDGET AMOUNT DUE</b>	<b>\$225.00</b>																				

**Tools | Receivables | Request Estimated Bill:** The Request Estimated Bill option from Bill Inquiry and Tools | Receivables | Request Estimated Bill is not available on accounts with a utility-based wildcard network.

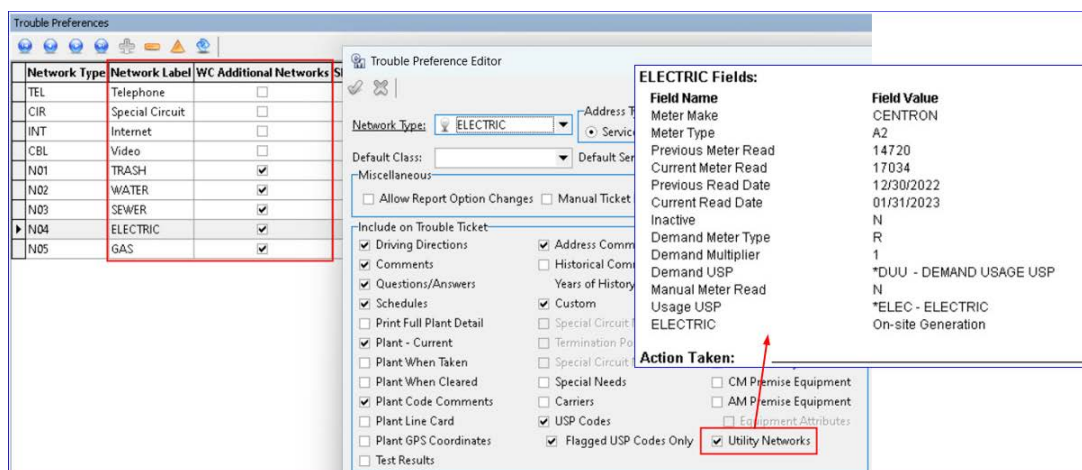
**Inquiry | A/R Balance**

The A/R Balance screen was updated to include the Utility Assistance and Budget Billing details. The Utility Assistance group box displays the "Funding Amount," "Remaining Bal," and the "Last Adj Date." The Budget Billing group box displays the "Total Budget Amount" and the "Effective Bill Date." A column labeled "Budget Amount" displays in the Bill Date rows and shows the history of the total budget balance for each bill date. The "A/R Balance Detail" report includes a "Budget Amount" column to represent each tier's budget amount. Printing the A/R Balance Activity report displays the "Total Budget Balance", and the Utility Assistance details.



## TROUBLE

**File | Preferences | Trouble Preferences:** A “Network Label” and “WC Additional Networks” column was added to the Trouble Preference grid. Checking the WC Additional Networks option will default to printing the utility network fields and options on Trouble Tickets. A “Utility Networks” check box also was added to the Trouble Preference Editor, and when checked, will print the utility network selected fields on the Trouble Ticket.



## DELINQUENTS

**Packages | Delinquency | Delinquent Notice:** A “Budget” column has been added to the Delinquent Notices grid to aid in identifying budget

accounts to calculate late penalties manually. If an account is set up for Budget billing the column will be checked. The following Delinquent Reports will also include the budget indicator:

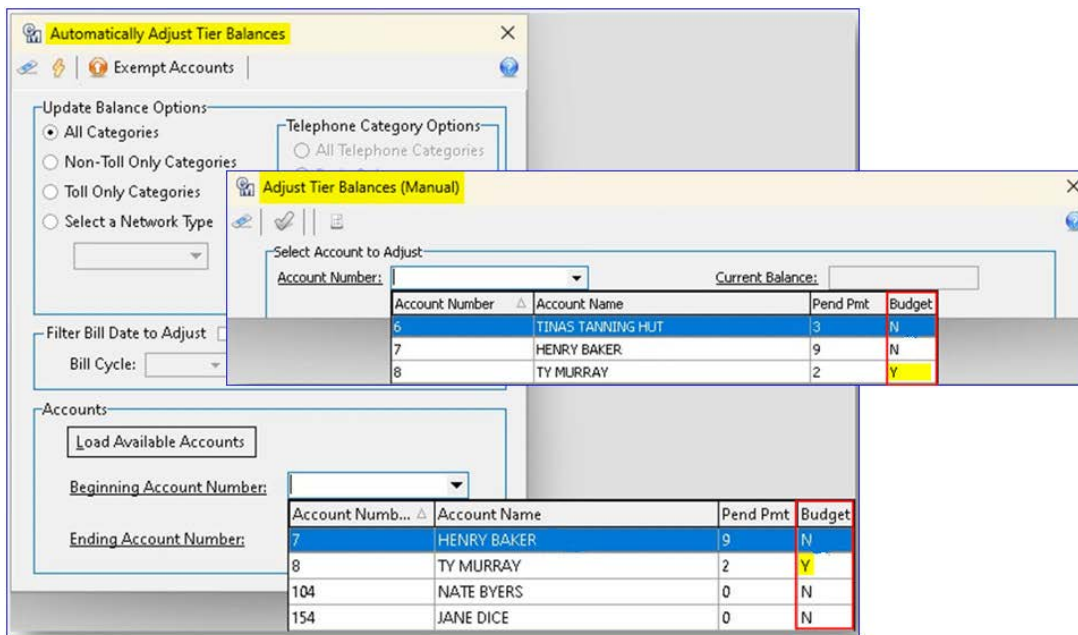
- Listing Report
- Non-Zero Balance Report
- Delinquent Account Detail

Account Name	Acct Number	Adj Curr...	Adj Past ...	Forgi...	Budget	Class	Status	CM Equip...
ABC COMPANY	993	\$159.50	\$159.50	<input type="checkbox"/>	<input type="checkbox"/>	8		<input type="checkbox"/>
ACME CORPORATION	1510	\$121.10	\$121.10	<input type="checkbox"/>	<input checked="" type="checkbox"/>	8		<input type="checkbox"/>
1469		\$0.96	\$0.96	<input type="checkbox"/>	<input checked="" type="checkbox"/>	8		<input type="checkbox"/>
VID5551255		\$120.14	\$120.14	<input type="checkbox"/>	<input checked="" type="checkbox"/>	8		<input type="checkbox"/>
KAYE ADDISON	592	\$329.55	\$329.55	<input type="checkbox"/>	<input type="checkbox"/>	8		<input type="checkbox"/>

## TOOLS

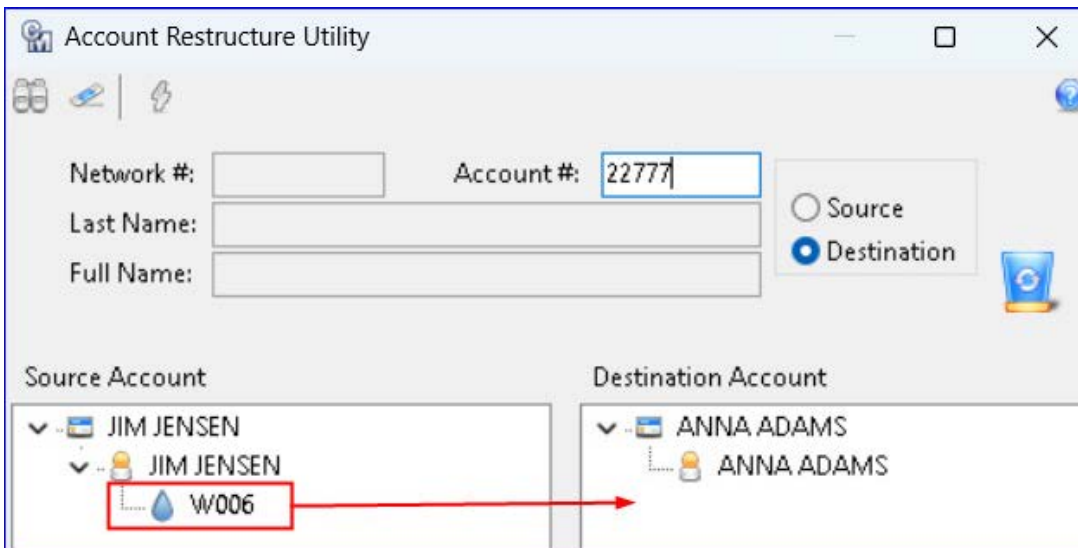
Tools | Receivables | Manual and Automatically Adjust Tier Balance tools:

Budget Accounts will be included in the Manual and Automatically Adjust Tier Balance tools. A Budget indicator column was added to the Account Number and Beginning Account Number dropdowns. Note: It is recommended budget accounts be selected individually to adjust balances, rather than adjusting all the accounts in the drop-down list.



## Tools | Restructure | Account Restructure

When processing an Account Restructure, Utility wildcard networks can be restructured to another account. However, accounts with Budget Billing records that have not been outdated cannot be restructured.



**Tools | Mass Processing | Importer:** A new Import Type of "Utility Meter Read" was added to the Import Type drop-down in the Importer. The import type can be utilized to import meter data to the wildcard network node fields based on selected fields in the tool.

## VIEW AND WORKFLOW

Utility-based Wildcard networks will be available in the View screen for the associated Wildcard Network node. Wildcard Network Nodes are available for selection from the Network tab of the Workflow Wizard to be used during the Workflow process.

## REPORTS

### Tools | Reports | Grid Reports

The following Grid reports were updated to include Wildcard Network details for reporting purposes.

- Report Types:
  - Network
  - Billed Services by Network
  - Addresses by Network
  - Plant by Address
  - Plant by Network
  - Sales Lead by Network
  - Trouble Ticket
  - Service Order by Network

The screenshot shows the 'Grid Reports' configuration window. The 'Report Type' is set to 'Network'. The 'Custom Reports' section is empty. The 'Chart Series' table is empty. The 'Table Column' section has several columns checked, including 'Utility Type', 'Previous Meter Read', 'Previous Read Date', 'Current Meter Read', 'Current Read Date', and 'Demand Customer'.

Use	Table Column
<input checked="" type="checkbox"/>	Utility Type
<input checked="" type="checkbox"/>	Previous Meter Read
<input checked="" type="checkbox"/>	Previous Read Date
<input checked="" type="checkbox"/>	Current Meter Read
<input checked="" type="checkbox"/>	Current Read Date
<input checked="" type="checkbox"/>	Demand Customer



**Tools | Reports | Grid Reports | Wildcard Networks:** A new Grid report called “Wildcard Networks” is available for reporting purposes. The grid report can be filtered by active networks only and network types and selectable fields include Meter data, Utility Type, Demand data, Usage USP, and Additional Fields to name a few.

**Tools | Reports | Reports | Pre-Billing Data Error Checks:** A new option was added to the Pre-Bill Error Check-MISC report for “Landlord/Tenant Relationship Errors.” This report will help identify errors for Landlord and Tenant issues so they can be corrected before billing.

Pre-Bill Error Check MISC Options

Report Selections

Note: These reports are for error checking only. Use the main reports for balancing and other purposes.

Select All

Clear All

Billing Cycle

Bill Cycle 01 Bill Date

Business Tiers with Local Bill Amounts Greater Than or Equal To 500

Residence Tiers with Local Bill Amounts Greater Than or Equal To 50

Advertising Amounts Greater Than or Equal To 100

Negative Advertising Amounts

Tiers with Variable Rate USP Codes Out of Range

Invalid Carrier Names

Tiers Assigned to Default Tax Area

Landlord/Tenant Relationship Errors

Print Credit Cards To Bill Errors Report

Tax Areas Validation

Bundle Monthly Savings