



Customer Master 23.2 Update Letter

ACP Data Collection Updates

ACP Data Collection Updates

The ACP Transparency Data Collection System (ACP Data Collection System) is the system of record for the annual data collection of ACP service provider service plan information and subscriber metrics. Affordable Connectivity Program transparency data collection will collect information on price, subscription rates, and plan characteristics of the internet service offerings of ACP participating providers as required by the Infrastructure Investment and Jobs Act.

MACC has addressed ACP reporting requirements by adding data fields to Customer Master to report on:

1. Every broadband plan (including price) available to ACP enrollees.
2. The number of ACP households enrolled in each.
3. Specified plan characteristic associated with each plan.

Additionally, a new “ACP Transparency Data Collection” tool was created to assist Providers in submitting this data to the FCC.

Maintenance Tables

Maintenance | Common | USP COdes: An ACP group box was added to the FCC tab in the USP Code Editor. The data entered here represents data needed for ACP reporting.

- **Unique Plan Identifier (UPI):** The Unique Plan Identifier should be exactly 26 characters and should begin with an identifier for the broadband type of the plan (“F” for fixed plans, “M” for mobile plans, “B” for both fixed and mobile plans), followed by the broadband provider’s FCC Registration Number (FRN), and ending with a provider-chosen string of exactly 15 alphanumeric characters uniquely identifying the specific plan within the broadband provider’s offerings. (Example Plan ID: F + 0001234567 + ABC123DEF456GHI = F0001234567ABC123DEF456GHI) The Unique Plan Identifier should not include special characters such as & * and %. Providers should use the FRN associated with their Broadband Data Collection filing (if applicable).
- **Broadband Service group box:** A “Type” drop-down to select the Broadband Service

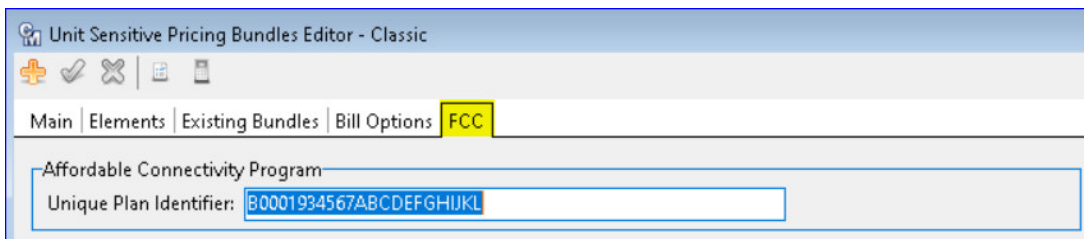
types of:

- Fixed
 - Mobile
 - Both
-
- Download Speed: Enter the download speed for the USP.
 - Upload Speed: Enter an upload speed for the USP.
-
- **Mobile Technology:** A description field for Mobile Technology.
 - **Equipment group box:** Check the equipment type(s) the user has.
 - Router
 - Modem
 - Other – If selected a Description needs to be populated. Any multiples need to be separated by a semicolon.
 - **Data Cap group box:** A “Type” drop-down to select the type of Data Cap for the USP:
 - 0 – No Data Cap (unlimited data)
 - 1 – Yes, Soft Data Cap (De-Prioritization)
 - 2 – Yes, Soft Data Cap (Throttling)
 - 3 – Yes, Hard Data Cap
 - 4 – Yes, Multi-Tiered Data Cap
 - 5 – Yes, Other Data Cap
 - Amount (GB): The Data Cap Amount
 - Additional Data Usage Charge: Data Cap Charge

Maintenance | Common | Bundles: An FCC tab was added to the Bundle Editor. The Affordable Connectivity Program group box contains a field to enter the “Unique Plan Identifier.” Like the USP Editor, the format of the ID for Bundles must contain:

- F, M or B (Fixed, Mobile or Both)
- 10-digit FRN Number
- 15 alphanumeric characters – Example: F0001234567ABC123DEF456GHI

If the Bundle is a Static Bundle the Unique Plan Identifier can be a length of 26 characters. If the Bundle is a Selective Bundle a length of 23 characters is allowed leaving the final 3 digits for the Variant number. The field will not accept the following characters: & * and %.



Tools

Tools | Mass Processing | FCC ACP | ACP Transparency Data Collection: A new “ACP Transparency Data Collection” tool is available to create and export this required FCC report that collects information on price, subscription rates and plan characteristics of the internet service offerings of ACP participating providers. The ACP Transparency Data Collection menu item was also added to Network Suites under the Processing menu. Two tabs for the “Service Plan” and “Subscriber Metrics” are available for those applicable reports. Toolbar buttons can be used to:

- Create New Reports:
- View Selected Report:
- Create ACP File:
- Delete selected Report:

Company	Report Date	Created By	File Name	Unique Plan ID
470	11/01/2023	blockhart		B0001234567A
470	10/01/2023	blockhart	C:\Users\cpunthapa\OneDrive - harriscomput	F0001234587A

Service Plans tab: When highlighted on the “Service Plan” tab clicking the “Create New Reports” button will open the “ACP Transparency Reports” screen with the following options:

- **Report Date:** A calendar drop down to select the snapshot date. The snapshot date will always be the first day of the month and represents the last full month. Example: If the Report Date is August 1st the report results will pull data between July 1-31.
- **Options:** The fields in the Options group box are disabled for Service Plans.
- **Cancel:** Clicking “Cancel” will cancel any changes and return the user to the grid.
- **Create Report:** Clicking “Create Report” will open the “FCC ACP Service Plans” grid, extract all Service Plans that had services in that date range, and a new report row will be added to the grid.

Report Date: 11/1/2023

Options:

UPI:

SAC:

Zipcode:

The “FCC ACP Service Plans” grid is editable to allow the user to add or change the information in the fields. The grid is populated with USP and Bundle information from Customer Master as well as additional ACP fields. Not all the columns are populated with data from Customer Master but are available for the user to input any additional ACP data.

Unique Plan Identifier	Service Plan Name	Legacy Plan	Fixed or Mobile	Mobile Technology	Base Month	Length of Intro	Post-Intro	Months of Contract	Associated Equipment Required	Assoc	Assoc	Assoc	Assoc
M0001234567ABC123DEF456GH	THREE LINES	N	Fixed		\$10.99				N	N	N	N	
F0001234567ABC123DEF456GH	FIBER- UP TO 50 MPS	N	Fixed		\$80.00				Y	Y	Y	N	
B0001234567ABC123DEF456GH	Fixed OR MOBILE Fiber up to	N	Both		\$80.00				Y	Y	Y	N	
B0001694567ABC123DEF456GH	FCC BUNDLE TEST	N			\$90.00				N	N	N	N	
B0001234687ABC123DEF456GH	INTERNET 25/0/25 MBPS	N	Both	4G	\$64.99				Y	Y	N	N	
M0001234687ABC123DEF456GH	500/50 MBPS	N	Mobile	5G	\$104.99				N	N	N	N	
B0001234567ABC123DEF456GH	FCC TESTING	N			\$90.00				N	N	N	N	
F0001234567ABC123DEF456GH	FCC TEST BUNDLE	N			\$90.00				N	N	N	N	
B0001234567ABC123DEF456GH	FIBER- UP TO 50 MPS	N	Mobile	5G	\$80.00				Y	Y	Y	N	
F123456789ABC123DEF234GHI	ACP FCC TEST CODE 1	N	Fixed		\$50.00				N	N	N	N	

Double-clicking a row will open an editor box below the row and allow the user to edit all the fields. The screen can be resized to expand and reveal all the fields for editing. Once edits are complete the “Update” button will update the changed fields and return the user to the grid. Clicking the “Export Grid” button will produce a CSV file of the data.

Subscriber Metrics tab: When highlighted on the “Subscriber Metrics” tab clicking the “Create New Reports” button will open the “ACP Transparency Reports” screen with the following options:

- **Report Date:** A calendar drop-down to select the snapshot date.
- **Options:** A drop-down field to select the following:

- Unique Plan Identifier: (Pulls from the UPI assigned to USPs/Bundles)
 - SAC: (Pulls from Report Area of the tier assigned the USP code)
 - Zip Code: (Pulls from the address on the tier assigned the USP code)
- **Cancel:** Clicking “Cancel” will cancel any changes and return the user to the grid.
 - **Create Report:** Clicking “Create Report” will open the “FCC ACP Subscriber Metrics” grid, extract a summary of the selections on the first screen, and a new report row will be added to the grid.

The grid is populated with the UPI, SAC, and Zip Code information from the first screen.

Unique Plan Identifier	SAC	Zip Co	Total ACP S	ACP Subsci	ACP Subsci	ACP Subsci	Average GE	Average He	ACP Subsci	Average GE	Average So	ACP Subsci	ACP Subsci
F0001234587ABC123DEF456GHI	890123	68008	1	0	15	5	1	\$25.00	\$4.00	1	\$25.00	3	15

Double-clicking a row will open an editor box below the row and allow the user to edit the fields in real-time. Three group boxes allow editing of the following:

- Subscriber Details
- Data Cap Details
- Subscriber Price Details

Once edits are complete clicking the “Update” button will update the changed fields, populate the “Changed Date” field, and return the user to the grid. Clicking the “Export Grid” button will produce a CSV file of the data.

The screenshot shows a web application window titled "FCC ACP Subscriber Metrics". At the top, there is a "Subscription Metrics" tab. Below the tab is a data grid with the following columns: Unique Plan Identifier, SAC, Zip Co, Total ACP Subs, ACP Subsci, ACP Subsci, ACP Subsci, Average GE, Average Ht, ACP Subsci, Average GE, Average So, ACP Subsci, ACP Subsci, ACP. The first row of data is: F0001234587ABC123DEF456GHI, 890123, 68008, 1, 0, 15, 5, 1, \$25.00, \$4.00, 1, \$25.00, 3, 15.

Below the grid is a form for editing the selected row. The form includes the following fields:

- Unique Plan Identifier: F0001234587ABC123DEF456GHI
- SAC: 890123
- Zip Code: 68008

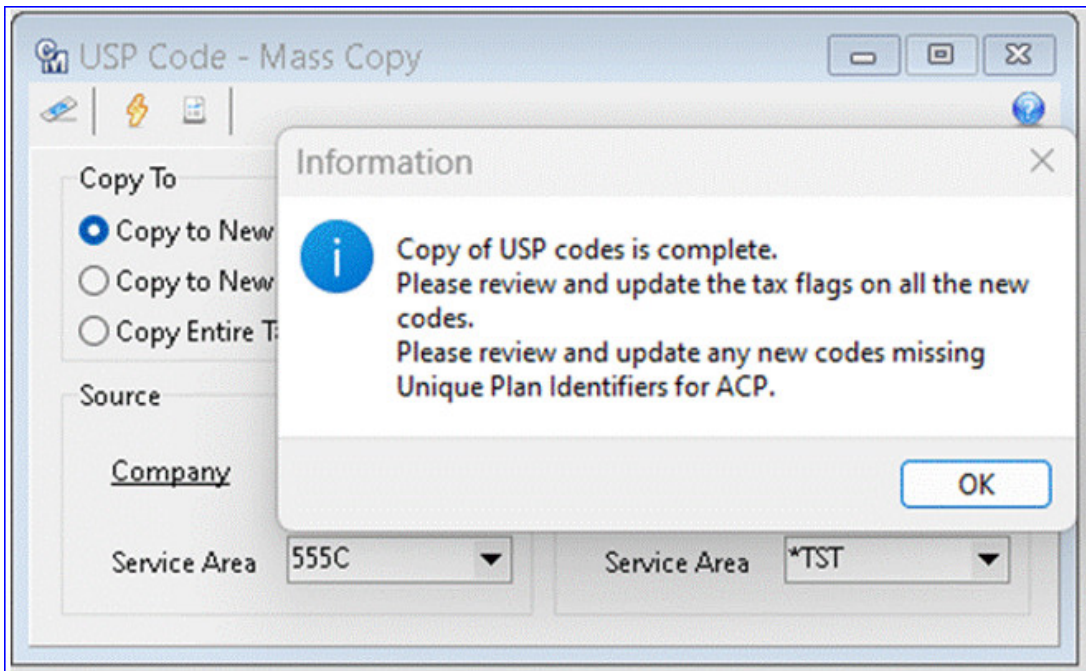
The form is divided into three sections:

- Subscriber Details:**
 - Total ACP Subscribers on Plan: 1
 - ACP Subscribers also Receiving Lifeline Benefit: 0
 - ACP Subscribers receiving Enhanced Tribal Benefit: 15
- Data Cap Details:**
 - ACP Subscribers Hit Hard Cap: 5
 - Average GB Hard Cap Overage: 1
 - Average Hard Cap Overage Amount Paid: \$25.00
 - ACP Subscribers Hit Soft Cap: \$4.00
 - Average GB Soft Cap Overage: 1
 - Average Soft Cap Overage Amount Paid: 25
- Subscriber Price Details:**
 - ACP Subscribers on Introductory Prices: 3
 - ACP Subscribers that Paid a Set-Up or Activation Fee: 15
 - ACP Subscribers Paying \$0 after All Non-ACP Discounts and ACP Benefit Applied: 0

At the bottom right of the form, there are two buttons: "Update" and "Cancel".

At the bottom left of the application, there is a status bar showing "1 Rows" and "Active".

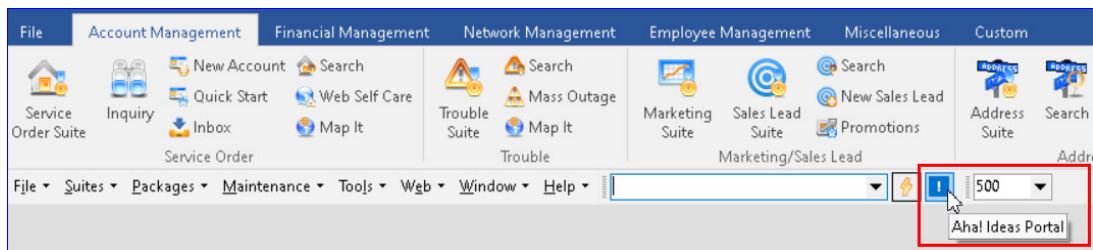
Tools | Mass Processing | USP Copy: USP Mass copy tool is utilized, the new ACP information will be copied, including the Unique Plan Identifier, to the new USP codes. The existing message that appears after executing the copy lets the user know they need to review/update any new codes missing Unique Plan Identifiers for ACP. An asterisk (*) next to a USP row on the tools report indicates the USP code has a Unique Plan Identifier.



Aha! – Create a link in CM to Access

Access Aha! Ideas Portal from Customer Master

If you haven't heard, MACC's Product Team launched a new tool to help gather and maintain great ideas. "Aha!" is a positive and collaborative environment where users of our products can recommend software enhancements and **VOTE** for great ideas entered by their peers. This feature is a web-based tool developed by Aha! and you must register to become a contributor. To make it convenient for our users, an "Aha! Ideas Portal" button was added to the main menu bar in Customer Master.



Users must contact MACC to register their email for access to the Aha! Ideas portal.

Contact your Client Solutions Manager at MACC or send an email to

MACCProdDev@MACCnet.com and provide the email you would like to register.

Clicking the Aha! Ideas Portal button will open the sign-in page in the user's default browser. Users will need to verify their email and create a password. Once a user is in the Aha! portal they can submit enhancement ideas as well as vote for other ideas.

Search all ideas...

+ ADD A NEW IDEA

My ideas	0
My votes	0
Proxy votes	4
My subscriptions	0
My organization	16

FILTER BY CATEGORY

All ideas

1

Allow work orders to be searched by project description

VOTE ▾

No description provided

Guest about 4 hours ago in 1

5

Electronic Signature

VOTE ▾

Add the capability for electronic signatures on purchase orders

Guest 21 days ago in Other 0

Future Consideration

Automate/Provision Reconnect SO with Payments

Automate/Provision Reconnect of Service Order with Payments

Updates were made to the Auto-Reconnect feature in Customer Master to automate/provision reconnection of Service Orders when real-time payments are received via the credit card processors CDS Global, Paymentus, and MACCs Web Self Care product. When real-time payments are made on disconnected accounts, services will automatically be provisioned for reconnection based on the Auto-Reconnect setup. This automation promotes efficiency and streamlines the auto-reconnect process.

Tools | Options | Auto-Reconnects: A “Service Order Class for reconnects” drop-down menu was added to the Tools | Options | Auto-Reconnects screen. The Class selected will be used for the automated reconnect process for real-time payments. The Service Order Class selected will be populated in the service order created behind the scenes as well as any manual payments. The Service Order Effective Date will default to the payment date.

Options

Company: 231 - TIDEWATER TELECOM INC.

General

Service Order Options

Service Order Defaults

Receivables

Returned Payment

Inventory

Billing

Services

E-Rate

Auto-Reconnects

E911

Product Control

Applied Payment

Auto-Reconnect upon receipt of full payment (zero balance)

Auto-Reconnect upon receipt of payment satisfying past-due amount

Pending Payment

Auto-Reconnect upon receipt of full payment (zero balance)

Auto-Reconnect upon receipt of payment satisfying past-due amount

Auto-Complete and Apply Service Orders

Number of days between Last Bill Date and Reconnect Date that are eligible: _____

Prompt for Auto-Reconnect feature on Payment Entry screens

Auto generate reconnect-fee OCC for networks

Tier Status for reconnects: _____

Service Order Class for reconnects:

Code	Description
RECB	REC TDNP IS & PLANT
RECIS	REC TDNP IS ONLY
RECPL	REC TDNP BUNDLE FEATUR
RECSA	REC TDNP TEL SWITCH AC
RECTV	REC TDNP CATV
RECTW	RECONNECT PORT NUMBER
REOVRTV	RECONNECT OPEN VIEW T
SBTDO	SEASONAL DISCONNECT E

In the example, Account 159 is disconnected. A real-time payment is made for the account in the Paymentus portal. The account is automatically reconnected.

The image contains three screenshots from a software interface:

- Left Screenshot:** An 'Inquiry' window for account 159 - JOAN CHE. It shows a table of services with columns for Tier, Status, Active, and Inactive. The table lists:

Tier	Status	Active	Inactive
JOAN CHE	DNP	08/29/2018	07/20/2021
(319) 555-3097	DNP	08/29/2018	07/20/2021
DSL4445567	DNP	08/29/2018	07/20/2021
VID5551253	DNP	08/29/2018	07/20/2021
- Middle Screenshot:** A 'Payment Submitted' confirmation window. It displays:

Confirmation number:	75025021
Payment Date:	May 23, 2023 11:35:31 AM
Payment Type:	Bill Payment
Account Number:	159
Payment Method:	Visa
Card Number:	*****1111
Payment Amount:	\$149.27
Total Amount Charged:	\$149.27
- Right Screenshot:** An account detail window for account 159 - JOAN CHE. It shows a table of services with columns for Tier, Status, Active, and Inactive. The table lists:

Tier	Status	Active	Inactive
JOAN CHE	RNP	08/29/2018	
(319) 555-3097	RNP	08/29/2018	
DSL4445567	RNP	08/29/2018	
VID5551253	RNP	08/29/2018	

Receivables Suite | Processing | eBill | Verify Process eBill Payment Files

In the rare instance that payment(s) did not get processed/applied and needs to be processed via the nightly eBill payment files from Paymentus, the account(s) in question will also automatically be reconnected once processed/applied.

Web Self-Care – User Payment Entry

Real-time payments made using the “Make a Payment” option in Web Self Care from the SSO (Single Sign On) web portal will also automatically provision and reconnect Service Orders.

Develop API to Calix Subscriber and Marketing

API to Calix Subscriber & Marketing Cloud

As demand for broadband and managed services skyrockets, Calix's world-class cloud and software platforms enable broadband providers to simplify operations, excite subscribers, and grow their value. MACC has taken steps to provide seamless integration from Customer Master to Calix to provide a real-time, user-friendly experience. Services, Plant, and Inventory/Equipment updates in Customer Master are sent to Calix in real-time thereby saving user's valuable time. These work efforts allow Support and Marketing Cloud integrations to move from a batch file process to a real-time process. This also aligns MACC for future integrations with Calix to eliminate swivel chair management.

Users must have a relationship with Calix as a new or existing customer and a MACC administrator activates the Calix API. Contact your Client Solutions Manager if your company is interested in the API to Calix Subscriber and Marketing Cloud.

Customer Master Maintenance Tables

Maintenance | Calix | Calix Groups: A maintenance table was created to house Calix Group information. Calix Group Codes represent non-overlapping groupings of internet speeds for Calix Marketing reports. Clicking the Insert or Edit button will change the grid to an editor screen to enter the "Calix Group Code" and "Calix Group Description."

Calix Group Code	Calix Group Description	Changed By	Changed Date
100m+	HIGH SPEED	sklich	9/15/2023 11:44:29 AM
51m-100m	MEDIUM SPEED	sklich	9/15/2023 11:44:01 AM
0m-50m	LOW SPEED	sklich	9/15/2023 11:43:12 AM

3 Rows Active

Maintenance | Common | USP Codes: A “Calix Group Code” drop-down menu was added to the USP Codes Editor screen. The drop-down selection displays the Calix Groups from the maintenance screen to set the applicable Calix Group Code for the USP Code.

Main FCC

USP Code: I1G Service Area: ARL

Description: Fastest Internet 1 Gig

Billing Amount: \$114.95 Bill Frequency: Monthly

Effective Date: 4/1/2022 Inactive Date:

GL Account: 7001.100 Network Type: Internet

Service Type: 1 (0 - 6) Bus/Res: Both

Brand Code:

Calix Group Code: ▼ Capital Credits Percent: 100.0000%

Code	Description
0m-50m	LOW SPEED
100m+	HIGH SPEED
51m-100m	MEDIUM SPEED

Maintenance | Equipment | Equipment Management: A ‘Calix’ checkbox has been added to the Attribute Editor in the Equipment Management screen to flag an attribute for Calix. A “Calix” column was also added to the Attributes dropdown to show attributes flagged for Calix in the Attribute Editor. Calix only allows certain characters for their Device IDs

(alphanumeric, colon, caret, dash). A validation of Device IDs will occur upon Post when the Calix box is checked. A message will display if a Device ID has an invalid character, so the user has an opportunity to correct the ID.

The screenshot shows the 'Attribute Editor' window. The 'Code' field contains 'DATAP1' and the 'Description' field contains 'Data Port 1'. Below these fields, there are checkboxes for 'Predefined', 'Required', 'Calix', and 'Inactive'. The 'Calix' checkbox is checked and highlighted with a red box. Below the checkboxes is a table with the following data:

Value	Inactive
<No Values to display>	

Maintenance | Plant | Plant Attributes: A “Calix” checkbox has been added to the Plant Attributes Editor screen to flag an attribute for Calix.

A “Calix” column was also added to the Plant Attributes grid to show attributes flagged for Calix in the Plant Attribute Editor. A validation of Device IDs will occur upon Post when the Calix box is checked in this editor as well.

The screenshot shows the 'Plant Attributes' grid and the 'Plant Attributes Editor' window. The grid has the following data:

Code	Description	Type	Calix	Changed By	Changed Date
COLOR	COLOR	Character	<input checked="" type="checkbox"/>		
DIS	DISTANCE	Numeric	<input checked="" type="checkbox"/>		
▶ REEL#	REEL NUMBER	Numeric	<input checked="" type="checkbox"/>		

The 'Plant Attributes Editor' window is open for the 'REEL#' attribute. It shows the 'Code' field with 'REEL#', the 'Description' field with 'REEL NUMBER', and the 'Type' dropdown set to 'Numeric'. The 'Calix' checkbox is checked and highlighted with a red box.

Accounting Master

Packages | Inventory | Item: A “Calix” checkbox was added to the Item Attributes Editor in Accounting Master to flag an Item Attribute for Calix. A “Calix” column was also added to the Item Attributes grid to show attributes flagged for Calix. The Item Attributes with a check will be displayed in the Calix Setup Wizard. Additionally, a “Calix” column has been added to the Item Attributes report accessed from the Report button. The column will display a “Y” in the column when an attribute is flagged for Calix. A validation of Device IDs will occur upon “Update” when the Calix box is checked.

Item Attributes Editor

Success Communications
Item: CBL REEL - CABLE REEL

Sequence # Inactive Required Calix

Attribute Name Return Attribute from CM

Description

Default Value

Seq	Attribute Name	Description	Default Value	Required	Calix	Ret
10	ADM1	ADM1		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
20	BOOTSTREAM	BOOTSTREAM LANGUAGE		<input type="checkbox"/>	<input type="checkbox"/>	

Packages | Inventory | Maintenance Tables | Item Attribute Setup: A “Calix” checkbox was added to the Item Attributes Setup in Accounting Master to flag an Item Attribute for Calix. A “Calix” column was also added to the Item Attributes grid to show attributes flagged for Calix. The Item Attributes with a check will be displayed in the Calix Setup Wizard.

Item Attribute Setup

Attribute Name Return Attribute from CM

Description Calix

Name	Description	Return Attribute	Calix	Changed By	C
_Calix Test	Testing for Calix	<input type="checkbox"/>	<input checked="" type="checkbox"/>	qschroeder	7/
ADM1	ADM1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	qschroeder	7/
BOOTSTREAM	BOOTSTREAM LANGUAGE	<input type="checkbox"/>	<input type="checkbox"/>	mcoufal	7/
CABLE CARD MAC	CABLE CARD MAC	<input type="checkbox"/>	<input type="checkbox"/>		

Calix Setup Wizard

Maintenance | Calix | Calix Setup Wizard: A new “Calix Setup Wizard” was created to activate and set up Calix services.

Activation screen: The first screen of the wizard is used to activate Calix API services and select the desired network types to use with Calix. The services activated will determine the additional screens in the wizard to format and notify Calix of updates via the API. A checkbox option for each Calix service is available and when checked will activate the service.

- Calix Support Cloud (Subscriber ID)
- Calix Marketing Cloud
- Calix Cut Through

The following Calix fields will be used with the Calix API for Calix Support Cloud, Calix Marketing Cloud, and Calix Cut Through. These credentials must be obtained from Calix and are required fields:

- Calix Client ID
- Calix Secret
- Calix Refresh Token
- Calix API URL

A Network grid at the bottom of the screen is used to select the networks to be used with Calix service. A “Test Connection” button can be used to test the connection to Calix.

Calix Setup Wizard

Activation

Calix Support Cloud (Subscriber ID)
 Calix Marketing Cloud
 Calix Cut Through

Calix Client ID:

Calix Secret:

Calix Refresh Token:

Calix API URL: Test Connection

	Network
<input type="checkbox"/>	Electric
<input type="checkbox"/>	Gas
<input checked="" type="checkbox"/>	Internet
<input type="checkbox"/>	Security
<input type="checkbox"/>	Sewage
<input type="checkbox"/>	Special Circuit
<input type="checkbox"/>	Telephone
<input type="checkbox"/>	Trash

Services screen: The second screen of the wizard is used to select the services needed for Calix Support Cloud. Any changes made to the selected USPs in Customer Master will be sent to Calix via the API so that Calix mirrors Customer Master. The grid will load with USPs based on the Network types selected on the first screen (Activation) of the wizard. USPs that don't have a network designation will also appear in the grid. Users can check the USPs or use the "Update USP" button to automatically select all Services that currently exist in Calix.

Calix Setup Wizard

Services USP Update

	Company	USP	Svc Area	USP Description	Network	Bus/Res	Group Code
<input type="checkbox"/>	MOUNTAI	BROKE		Broken Contract Fee		Both	
<input type="checkbox"/>	MOUNTAI	EQUIP		EQUIPMENT		Residence	
<input type="checkbox"/>	MOUNTAI	ERATE		Erate Discount		Business	
<input type="checkbox"/>	MOUNTAI	ERINT		Erate Discount - INT	Internet	Business	
<input type="checkbox"/>	MOUNTAI	FUSF		Federal Universal Svc Fund		Both	
<input checked="" type="checkbox"/>	MOUNTAI	I1G	BLA	Fastest Internet 1 Gig	Internet	Both	1 GIG
<input checked="" type="checkbox"/>	MOUNTAI	I1G	ARL	Fastest Internet 1 Gig	Internet	Both	1 GIG
<input checked="" type="checkbox"/>	MOUNTAI	I1GSP	BLA	Fastest Internet 1 Gig Special P	Internet	Both	1 GIG
<input checked="" type="checkbox"/>	MOUNTAI	I250		Faster Internet 250 Mbps	Internet	Business	250 MB
<input checked="" type="checkbox"/>	MOUNTAI	I50		Fast Internet 50	Internet	Both	50 MB
<input checked="" type="checkbox"/>	MOUNTAI	IEQU		Internet Equipment	Internet	Both	
<input checked="" type="checkbox"/>	MOUNTAI	IMWFI		Managed Wifi	Internet	Both	
<input checked="" type="checkbox"/>	MOUNTAI	IROUT		Router Lease	Internet	Both	
<input type="checkbox"/>	MOUNTAI	ISERV		Internet Technical Support & S	Internet	Both	
<input type="checkbox"/>	MOUNTAI	NUSF		NE Universal Svc Fund		Both	
<input type="checkbox"/>	MOUNTAI	OADJ		Miscellaneous Adjustment		Both	
<input type="checkbox"/>	MOUNTAI	OAREF		Refund On Account		Both	
<input type="checkbox"/>	MOUNTAI	OINT		Security Deposit Refund - Inter		Both	
<input type="checkbox"/>	MOUNTAI	OLAB		Labor		Both	

Devices Inventory/Equipment screen: The Inventory/Equipment screen contains a grid that will allow users to select inventory/equipment from Accounting Master and Customer Master. When AM Inventory or CM Equipment updates are made the selected inventory/equipment items will be sent to Calix and are needed for Calix Support Cloud. A right-click menu on the grid allows the user to “Select/Deselect” and “Select All/Deselect All.”

Calix Setup Wizard

Devices - Inventory/Equipment

	Equip. Type	Item	Item Description	Manufacturer	Model	AM Company
<input checked="" type="checkbox"/>	AM	6810 UPS	6810 CyberPower UPS			Mountain Valley Communications
<input checked="" type="checkbox"/>	CM	711 GE ONT	ONT	Calix		
<input checked="" type="checkbox"/>	AM	711GE ONT	711GE ONT (2 POTS, 2GE)			Mountain Valley Communications
<input checked="" type="checkbox"/>	AM	760GX ONT	760GX ONT (8 POTS, 4 GE)	CALIX		Mountain Valley Communications
<input checked="" type="checkbox"/>	AM	844G-1 GigaCent	844G-1 GigaCenter, 2 POT	CALIX		Mountain Valley Communications
<input checked="" type="checkbox"/>	CM	A1000	Set Top Box	Motorola		
<input checked="" type="checkbox"/>	AM	Access Panel	Access Panel			Mountain Valley Communications
<input checked="" type="checkbox"/>	AM	Android	Android			Mountain Valley Communications
<input checked="" type="checkbox"/>	AM	Android	Android			Mountain Valley Wireless
<input checked="" type="checkbox"/>	AM	APC	APC Battery Backup			Mountain Valley Communications
<input checked="" type="checkbox"/>	AM	ARRIS MODEM	Arris Modem			Mountain Valley Communications
<input checked="" type="checkbox"/>	AM	Bug Spray	Bug Spray			Mountain Valley Communications
<input checked="" type="checkbox"/>	AM	Cable	Cable			Mountain Valley Communications
<input checked="" type="checkbox"/>	AM	Cust Int Bund	Customer Internet Bundle			Mountain Valley Communications
<input checked="" type="checkbox"/>	AM	Fiber	Fiber Optic Cable			Mountain Valley Communications
<input checked="" type="checkbox"/>	AM	Gig Install	Gigacenter Installation Bu			Mountain Valley Communications
<input checked="" type="checkbox"/>	AM	Int Bundle	Internet Bundle			Mountain Valley Communications
<input checked="" type="checkbox"/>	AM	IPhone	IPhone			Mountain Valley Communications
<input checked="" type="checkbox"/>	AM	IPhone	IPhone			Mountain Valley Wireless

Back Next Cancel

Devices – Plant screen: The Devices-Plant screen contains a grid that will allow users to select Plant Codes they want to track in Calix Support Cloud. When Plant in Customer Master is updated, the changes will be sent to Calix via the API.

Calix Setup Wizard

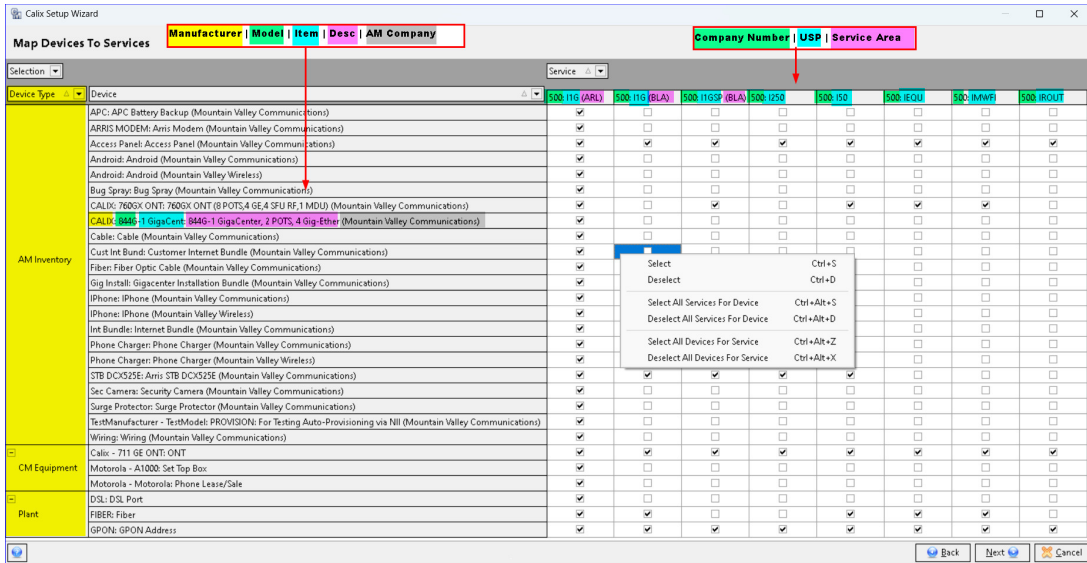
Devices - Plant

	Plant Code	Plant Code Description
<input type="checkbox"/>	CRV	CRV
<input checked="" type="checkbox"/>	DSL	DSL Port
<input checked="" type="checkbox"/>	FIBER	Fiber
<input checked="" type="checkbox"/>	GPON	GPON Address
<input type="checkbox"/>	PAIR	Cable Pair
<input type="checkbox"/>	SPLIT	Splitter Port
<input type="checkbox"/>	TERM	Cabinet

Back Next Cancel

Map Devices to Services screen: The “Map Devices to Services” screen in the wizard is used to map the devices to the services. This can be a one-time setup that uses the current Service and Device selections in the wizard for the user to select which Devices should

track which Services in Calix. The grid is populated based on the user’s AM Inventory, CM Equipment, and Plant device selections in the Calix Setup Wizard. Devices are grouped going down the left side of the grid and display the device information in the “Device” column. Services (USP Codes) go across the top, right side of the grid with checkboxes in the columns to select the service for the device. Right-click options on the grid are available for selecting an entire row or column. Filtering drop-downs are available on the toolbar and the columns in the grid.



Device Endpoints screen: Three grids needed for Calix Support Cloud will be displayed in the “Device Endpoints” screen; a “CM Equipment Endpoint Description,” “CM Plant Endpoint Description,” and an “AM Inventory Description” grid. Each grid will allow the user to drag/drop the endpoints to prioritize and reorder them. Attributes must exist in the CM Equipment, CM Plant, and AM Inventory tables and be flagged as Calix, or they won’t be displayed in the grids.

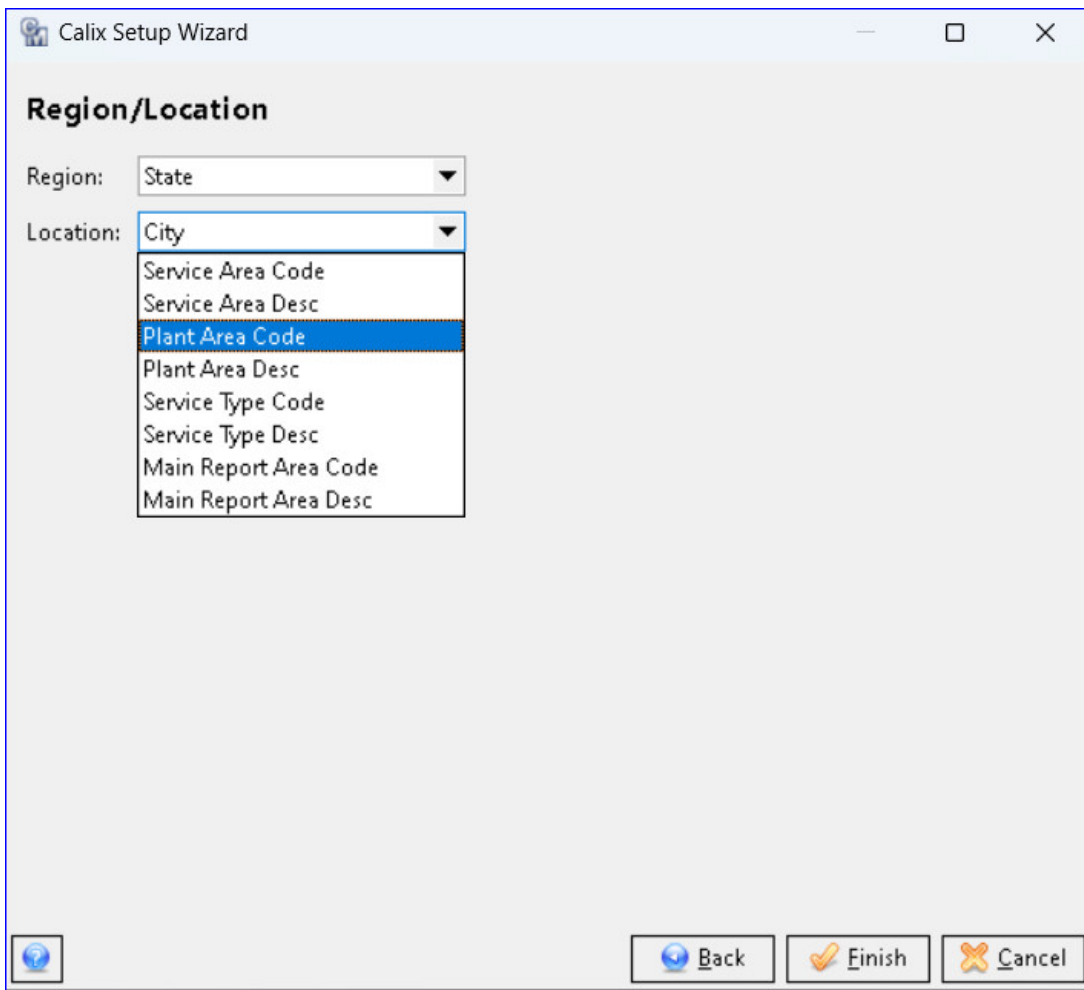
Calix Setup Wizard

Device Endpoints

CM Equip. Endpoint Description	CM Plant Endpoint Description	AM Inventory Description
FSAN for CALIX	FSAN For CALIX	Serial Number
SERIAL NUMBER	SERIAL NUMBER	Subscriber Name
MAC ADDRESS	MACC ADDRESS	Location ID
Subscriber Name	Subscriber Name	User Domain
Location ID	Location ID	IP Address
IP Address	User Domain	
User Domain	IP Address	
Data Port 1	COLOR	
Data Port 2	REEL NUMBER	
	DISTANCE	

Click/Drag on Endpoints to reorder priority

Region/Location screen: The final screen of the wizard, the “Region/Location” screen used with Marketing Cloud will only appear if the “Calix Marketing Cloud” service is activated in the first (Activation) screen. The “Region/Location” screen contains drop-down selections for transmission of region and location data to Calix via the API. A scrollbar along the right side of the drop-down menu can be used to scroll and see all the options. Clicking the “Finish” button will save all the selections in the wizard.

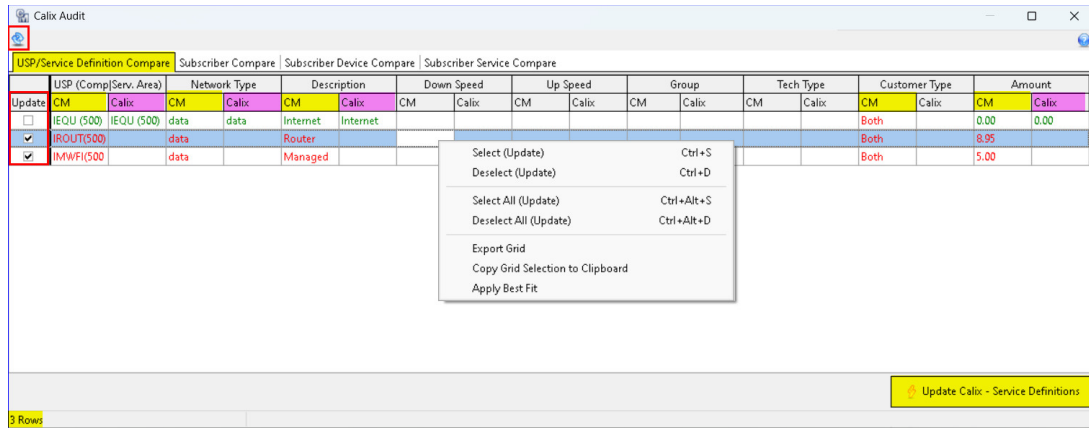


CALIX AUDIT TOOL

Tools | Audit | Calix Audit: The Calix Audit Tool can be used to extract data sets from Calix and return what Calix has in their tables to the tool in Customer Master and identify matches and discrepancies. The tool can then be used to true-up Calix data by selecting discrepancies and updating them with Customer Master data in mass from the tools grid. If Customer Master features need to be updated to match Calix, the user will need to perform changes manually by going to the erroneous feature in Customer Master and changing it. The Calix Audit tool has four data tabs to get and compare different data sets from Calix.

USP/Service Definition Compare tab: The “USP/Service Definition Compare” grid will load with USP codes that have been selected in the Calix Setup Wizard. Only USP records that do not fully match both Calix and CM will be displayed in the grid. If a field is only found in one of the sources (CM/Calix) or if the existing data in Calix does not match the current data in CM, it will be shown in red. If a field has matching data in both sources (CM/Calix) will be shown in green. Checking the “Update” box will update that record in Calix with the

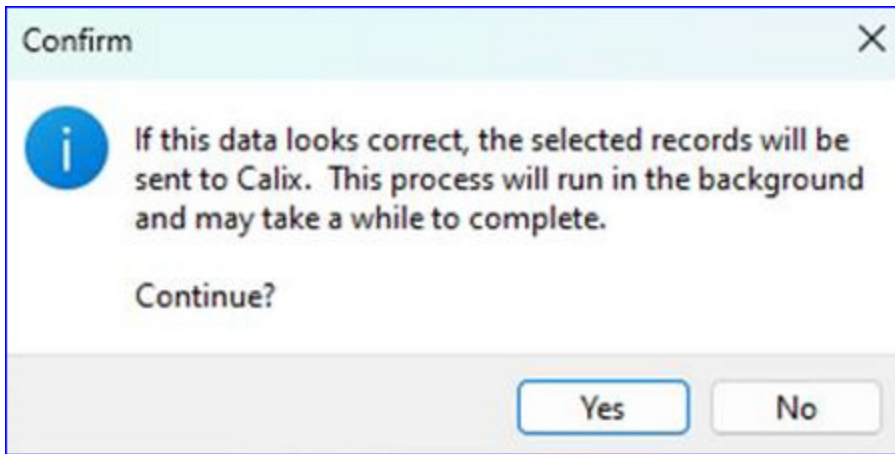
CM value via the API when the “Update Calix – Service Definitions” button is clicked. A right-click menu is available to Select/Deselect records. A “Refresh” button is available on the toolbar. A row count for each of the tabs is displayed at the bottom of the screen



Clicking the “Update Calix – Service Definitions” button will produce the “Service Definitions Audit” report, allowing the user to review a summary of updates that will be sent to Calix.

All Rpt Areas CO # : 470 OCN # : 470a		Calix Audit Tool Report Service Definitions Audit Q Dev DB Comp							Page 1 of 1 9/20/2023 10:58:23 AM PBicket	
	USP (Co.Serv)	Type	Description	Down Speed	Up Speed	Group	Tech Type	Cust Type	Amount	
CM:	02_T (470)	data	Calix Testing	999	999	medium2	Optical Carrier / Fiber to the Premises	Residential	99.00	
Calix:	02_T (470)	data	Calix Testing			medium2		Residential	99.00	
CM:	04_T (470)	voice	Calix Testing Testing Testing Testing Te			low123456789		Residential	92.99	
Calix:	04_T(470)	voice	Calix Testing					Residential	92.99	
CM:	12PCR(471)	other	12-PACK CREDIT					Residential	5.00	
Calix:										

When the report is closed, a message will appear letting the user know if the data looks correct and the records will be sent to Calix. Clicking “Yes” will send the selected records to Calix and the row(s) will be removed from the grid. Values will be updated with CM values in mass and true-up Calix. Once these records are sent to Calix, CM and Calix will be in sync.



Subscriber Compare tab: The Subscriber Compare grid will display both CM and Calix values for each of the subscriber fields such as network and account information. Only network and account records that have at least one mismatched field will be displayed. Matching fields will display in green and mismatched fields will display in red. A scrollbar at the bottom of the screen can be used to scroll to the right and view all the data. Checking the “Update” box will update that record in Calix with the CM value via the API when the “Update Calix – Subscribers” button is clicked

Update	Comp. No.	Account No.	Network No.	Network Desc.	State	Zip	Lat	Lon	Birth Date	Max Down	Cust. Sub Type	Region	Location		
<input type="checkbox"/>	500 500000057	23456789	Internet	Internet	NE	68008	68008	41.4525254 41.4525254 -96.348317 -96.348317		1000	1000	Residential	Residential	NE	BLAJR
<input type="checkbox"/>	500 500000078	INT0023	Internet	Internet	NE	68008	68008	41.4525254 41.4525254 -96.452187 -96.452187				Residential	Residential	NE	BLAJR
<input type="checkbox"/>	500 500000096	319551046	Internet	Internet	NE	68008	68008	41.4525254 41.4525254 -96.348317 -96.348317		1000	1000	Residential	Residential	NE	BLAJR
<input type="checkbox"/>	500 500000107	12345678	Internet	Internet	NE	68008	68008	41.4525254 41.4525254 -96.348317 -96.348317		250	250	Residential	Residential	NE	BLAJR
<input type="checkbox"/>	500 500000108	INT5555	Internet	Internet	WA	98104	98104	47.6015566 -122.33233				Residential	Residential	WA	SEATTLE

5 Rows

Clicking the “Update Calix – Subscribers” button will produce the “Subscribers Audit” report, allowing the user to review a summary of updates that will be sent to Calix. When the report is closed, the records can be sent to Calix.

All Rpt Areas		Calix Audit Tool Report				Page 1 of 772	
CO # : 470		Subscribers Audit				9/20/2023 10:46:53 AM	
OCN # : 470a		Q Dev DB Comp				PBicket	
Company	Account	Network	Network Description	Last Name	Bill Language	Bill Status	Business Name
	Name		First Name	Billing City	Billing State	Billing Zip	Cust Type
	Billing Address 1		Billing Address 2	City	State	Zip	Start Date
	Address 1		Address 2	City	State	Zip	Birth Date
	Latitude		Longitude	Max Down	Phone	Email	
	Region		Location				
CM:							
Calix:	PAT PARRELLI		PAT	PARRELLI	en_US	Disconnected	
	1200 VOSS DR			BLAIR	NE	68008	Residential
	1200 VOSS DR			BLAIR	NE	68008	03-13-2003
	41.5568826		-96.1445011				
470	10	3195550109	Telephone				
CM:	PAT PARRELLI		PAT	PARRELLI	en_US	Disconnected	
	1200 VOSS DR			BLAIR	NE	68008	Residential
	1200 VOSS DR			BLAIR	NE	68008	03-13-2003
	STC		555				
Calix:	PAT PARRELLI		PAT	PARRELLI	en_US	Disconnected	
	1200 VOSS DR			BLAIR	NE	68008	Residential
	1200 VOSS DR			BLAIR	NE	68008	03-13-2003
	41.5568826		-96.1445011				

Subscriber Device Compare: This tab will display any device that is found in CM, but not in Calix. The system looks for all Subscribers in CM to see if they have any CM Equipment, AM Inventory, or Plant items that have been selected in the Calix Setup Wizard. If any items don't match the list of devices retrieved from Calix, they will be displayed in red. This tab will also display any device that is found in Calix, but not in CM, and in this scenario, the Device ID will display in the "Unknown" column. If the "Update" box is checked for one of these records, they will be deleted from Calix when the "Update Calix – Subscriber Devices" button is clicked.

Calix Audit										
USP/Service Definition Compare Subscriber Compare Subscriber Device Compare Subscriber Service Compare										
Update	Comp. No.	Account No.	Account Name	Network No.	Network Type	Item Desc.	CM Equip. Device ID	AM Inv. Device ID	CM Plant Device ID	Unknown
<input type="checkbox"/>	470	952	BETTY BOOP	3195551366	Video	CISCO-A123	00010			
<input type="checkbox"/>	470	982	FRANK N STINE	3195551370	Video	CISCO-A123	00009			
<input type="checkbox"/>	470	982	FRANK N STINE	3195551370	Internet	MOTOROLA-B123	00008			
<input type="checkbox"/>	470	995	JAMES KRAMER	3195551373	Video	CISCO-A123	00099			
<input type="checkbox"/>	470	995	JAMES KRAMER	3195551373	Internet	MOTOROLA-B123	00001			
<input type="checkbox"/>	470	998	MIKE CALLUM	3195551399	Video	CISCO-A123	987654			
<input type="checkbox"/>	470	1001	KEITH RICHARDS	3195555556	Internet	MOTOROLA-B123	987654			
<input type="checkbox"/>	470	1023	DALE DOUGLAS	3195551372	Internet	MOTOROLA-B123	123456789			
<input type="checkbox"/>	470	1049	ALICE PIERRA	1234567890	Internet	MOTOROLA-B123	99988777			
<input type="checkbox"/>	470	1093	JASON SMITH	3195551013	Internet	MOTOROLA-B123	00009			
<input type="checkbox"/>	470	1101	NICK'S GYROS	3195551114	Telephone					10000
<input type="checkbox"/>	470	1101	NICK'S GYROS	3195551114	Internet	MOTOROLA-B123	123654789654321			
<input type="checkbox"/>	470	1101	NICK'S GYROS	3195551114	Telephone	LINE-5555			55504	
<input type="checkbox"/>	470	1101	NICK'S GYROS	3195551114	Internet	APPLE-4S	123			
<input type="checkbox"/>	470	1249	RORY CALHOUN	3195551147	Internet	MOTOROLA-B123	00003			
<input type="checkbox"/>	470	1528	GARY SANCHEZ	3195551123	Internet	MOTOROLA-B123	10000			
<input type="checkbox"/>	470	1581	Whats App SOPP test	N10WhatsApp	False Internet	MOTOROLA-B123	00001			

The Device ID's in Blue are already associated to another Subscriber in Calix, therefore they cannot be updated. Calix only allows a Device ID to be associated to a single Subscriber.

39 Rows

Update Calix - Subscriber Devices

Clicking the "Update Calix – Subscriber Devices" button will produce the "Subscriber Devices Audit" report, allowing the user to review a summary of updates that will be sent to Calix. When the report is closed, the records can be sent to Calix.

All Rpt Areas		Calix Audit Tool Report				Page 1 of 3	
CO # : 470		Subscriber Devices Audit				9/21/2023 3:28:25 PM	
OCN # : 470a		Q Dev DB Comp				PBicket	
Company	Account	Account Name	Network	Network Description			
470	335	KATHY A FRIEND	3195550100	Internet			
Item Description	New CM Equipment ID	New AM Inventory ID	New CM Plant ID	Unknown Calix ID			
MOTOROLA-B123			987654321				
470	444	RANDY HAROLD	3195550180	Video			
Item Description	New CM Equipment ID	New AM Inventory ID	New CM Plant ID	Unknown Calix ID			
CISCO-A123			10001				

Subscriber Service Compare tab: The “Subscriber Service Compare” tab functions just like the Subscriber Compare tab and is a list of services (network USPs) assigned to a subscriber. Matching items will appear in green, and mismatching items will appear in red. Right-click options are the same as the other tabs.

Update	Comp. No.	Account No.	Network No.	Network Desc.	USOC		Type		Technology Type		Customer Type		CM
					CM	Calix	CM	Calix	CM	Calix	CM	Calix	
<input type="checkbox"/>	470	1101	3195551114	Internet	02_T (470)		data		Optical		Residential		1236547
<input type="checkbox"/>	470	1101	3195551114	Telephone	04_T (470)		voice				Residential		1236547
<input type="checkbox"/>	470	1101	3195551114	Internet	IMODM(47		data		Geostation		Both		CX1111
<input type="checkbox"/>	470	1101	3195551114	Telephone	EQTEL(470)		voice				Residential		CX1111
<input type="checkbox"/>	470	1101	3195551114	Internet	EQINT(470)		data				Residential		NICK'S
<input type="checkbox"/>	470	1101	3195551114	Internet	EQINT(470)		data				Residential		NICK'S
<input type="checkbox"/>	470	1101	3195551114	Internet	02_T (470)		data		Optical		Residential		NICK'S
<input checked="" type="checkbox"/>	470	1103	3195551467	Internet	IMODM(47	IMODM(47	data	data	Geostation	Geostation	Both	Both	junepes
<input type="checkbox"/>	470	1103	3195551467	Telephone	EQTEL(470)		voice				Residential		junepes
<input type="checkbox"/>	470	1103	3195551467	Internet	EQINT(470)		data				Residential		junepes
<input type="checkbox"/>	470	1103	3195551467	Internet	EQINT(470)		data				Residential		junepes
<input type="checkbox"/>	470	1103	3195551467	Internet	02_T (470)		data		Optical		Residential		junepes
<input type="checkbox"/>	470	1103	3195551467	Internet	02_T (470)		data				Residential		00009
<input type="checkbox"/>	470	1103	3195551467	Internet	02_T (470)		data				Residential		00009
<input type="checkbox"/>	470	1103	3195551467	Internet	02_T (470)		data				Residential		00009
<input type="checkbox"/>	470	1103	3195551467	Internet	02_T (470)		data				Residential		00009

Clicking the “Update Calix-Subscriber Services” button will produce the “Subscriber Services Audit” report, allowing the user to review a summary of updates that will be sent to Calix. When the report is closed, the records can be sent to Calix.

All Rpt Areas
 CO # : 470
 OCN # : 470a

Calix Audit Tool Report
 Subscriber Services Audit
 Q Dev DB Comp

Page 1 of 42
 9/20/2023 4:29:37 PM
 PBicket

Company	Account	Network	Network Description				
	<u>USP (Co.)Serv</u>	<u>Type</u>	<u>Tech Type</u>	<u>Cust Type</u>	<u>Endpoint 1</u> <u>Endpoint 3</u>	<u>Endpoint 2</u> <u>Endpoint 4</u>	
<u>CM:</u>		other					
<u>Calix:</u>	01_T(470)	other		Residential	123	NICK'S GYROS	
<u>CM:</u>		other					
<u>Calix:</u>	04_T(470)	voice		Residential	NICK'S GYROS	470.TEL:1101:3195551114:0:123 MAIN ST	
470	7	3195550104	Internet				
	<u>USP (Co.)Serv</u>	<u>Type</u>	<u>Tech Type</u>	<u>Cust Type</u>	<u>Endpoint 1</u> <u>Endpoint 3</u>	<u>Endpoint 2</u> <u>Endpoint 4</u>	
<u>CM:</u>	I00DM(470)	data	Geostationary Satellite	Both	00006 470.INT:7:3195550104:0:13250 NORTH CREEK RD	HENRY BAKERSDozen	
<u>Calix:</u>							
<u>CM:</u>	EQTEL(470)	voice		Residential	00006 470.TEL:7:3195550104:0:13250 NORTH CREEK RD	HENRY BAKERSDozen	
<u>Calix:</u>							
<u>CM:</u>	EQINT(470)	data		Residential	00006 470.INT:7:3195550104:0:13250 NORTH CREEK RD	HENRY BAKERSDozen	
<u>Calix:</u>							
<u>CM:</u>	EQINT(470)KSSA	data		Residential	00006 470.INT:7:3195550104:0:13250 NORTH CREEK RD	HENRY BAKERSDozen	

Enroll/De-Enroll API to NLAD

NLAD Enroll/De-Enroll API Automation to USAC

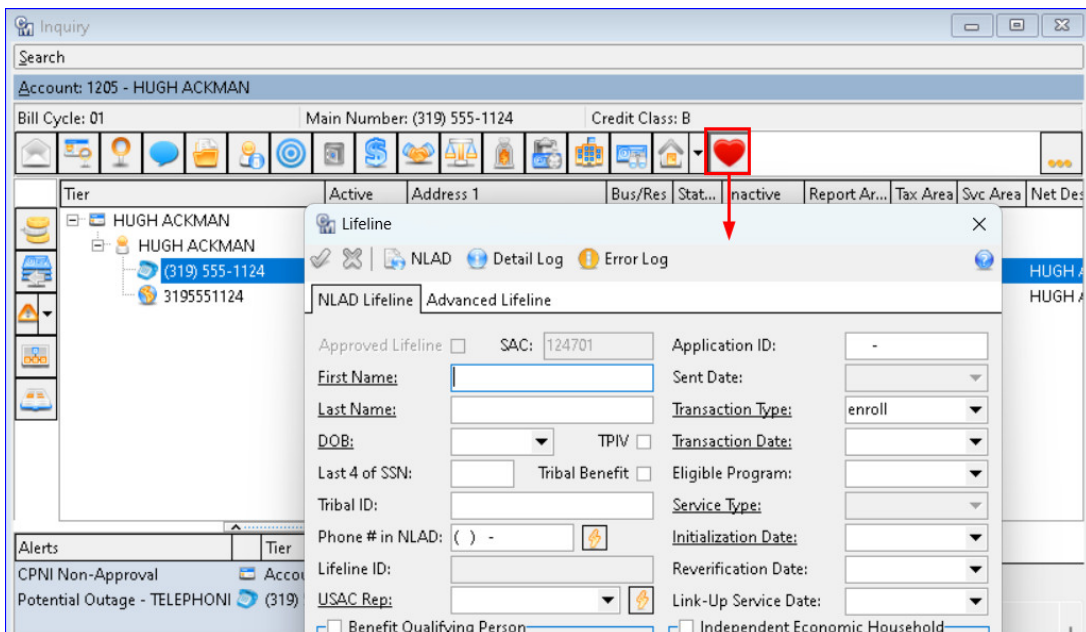
USAC has an API to allow companies to send enrollment and de-enrollment information to USAC for Lifeline services with NLAD, creating efficiency with Lifeline records. MACC has automated our existing interface so users can send a single Lifeline record at the time of entry, eliminating the need to send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

Inquiry | Service Order | Telephone Network | Telephone node | Lifeline: The “USAC Rep” field is now underlined and required in the Lifeline and ACP screens. The ID will be used to pass credentials and retrieve tokens to/from the NLAD API. Upon posting a message will display if the USAC Rep isn’t populated.

The screenshot shows a web form titled "Lifeline". At the top, there are navigation icons for a checkmark, an X, a document labeled "NLAD", a globe labeled "Detail Log", and an information icon labeled "Error Log". Below these are several input fields: "Approved Lifeline" with a checkbox, "SAC:" with a text box containing "290500", "First Name:" with a text box, "Last Name:" with a text box, "DOB:" with a dropdown menu and a "TPIV" checkbox, "Last 4 of SSN:" with a text box and a "Tribal Benefit" checkbox, "Tribal ID:" with a text box, "Phone # in NLAD:" with a text box containing "(319)555-1085" and a lightning bolt icon, "Lifeline ID:" with a text box, and "USAC Rep:" with a dropdown menu and a lightning bolt icon. The "USAC Rep:" field is highlighted with a red rectangular border. At the bottom, there is a checkbox labeled "Benefit Qualifying Person".

Inquiry | NLAD: Revisions were made to un-connect Lifeline from the Service Order process. The Lifeline icon was added to the Inquiry Screen so users can access and manage Lifeline outside of the Service Order for both Lifeline and Advance Lifeline. The Lifeline icon is also available from the Inquiry screen for users who do not have the interface activated. The icon is only visible on the toolbar when highlighted on the Telephone, Internet, or Cellular tier. The existing Lifeline functionality has not changed and remains the same even when accessed outside of the Service Order.

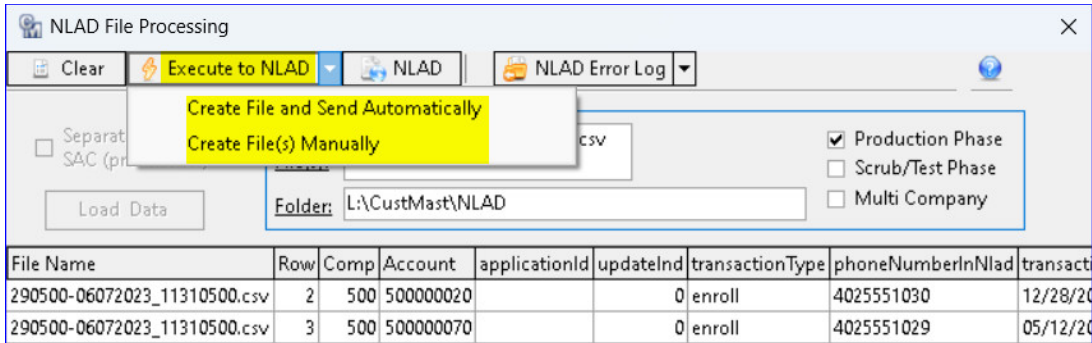
When NLAD API is activated, on the Post/Save in the Lifeline screen, the NLAD record will automatically be sent to USAC via the interface. Users will be able to enroll, de-enroll, transfer, and update subscriber information on an individual basis as needed. If the interface is not activated, the screen will work as it did previously. In addition, NLAD records can be created on a new install, which is sent to USAC when the Service Order is applied.



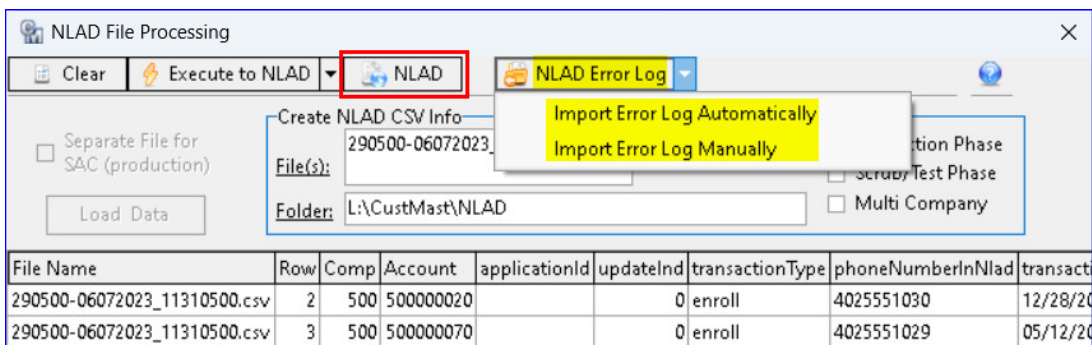
Tools | Mass Processing | Lifeline | NLAD File Processing

The “Create and Upload NLAD File” menu item at Tool | Mass Processing | Lifeline was changed to “NLAD File Processing.” When the NLAD API is activated, the “Create File” button is changed to “Execute to NLAD.” It remains as “Create File” if the interface is not activated. The Execute to NLAD button has a dropdown so users can choose to automatically connect to NLAD via the API with the “Create File and Send Automatically”

option. When an employee has a 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 is changed to “NLAD Error Log.” A drop-down menu was added next to the button, allowing users to “Import Error Log Automatically” via the NLAD website or “Import Error Log Manually.” When an employee has the proper credentials the “NLAD Error Log” button can be clicked to automatically retrieve any potential error log from USAC without selecting it from the drop-down menu. In addition, the NAP button was renamed “NLAD” and will work as it did previously to provide a portal for users to access the NLAD website, whether the API is activated or not







Tools | Reports | Grid Reports | Lifeline: A “Failed Date” and “Failed Reason” table selection was added to the Lifeline grid report. With these options in place, the report can be used to discover NLAD records that failed and why.

Grid Reports

Settings View 

Report Type Lifeline

Custom Reports

  Clear  Add 

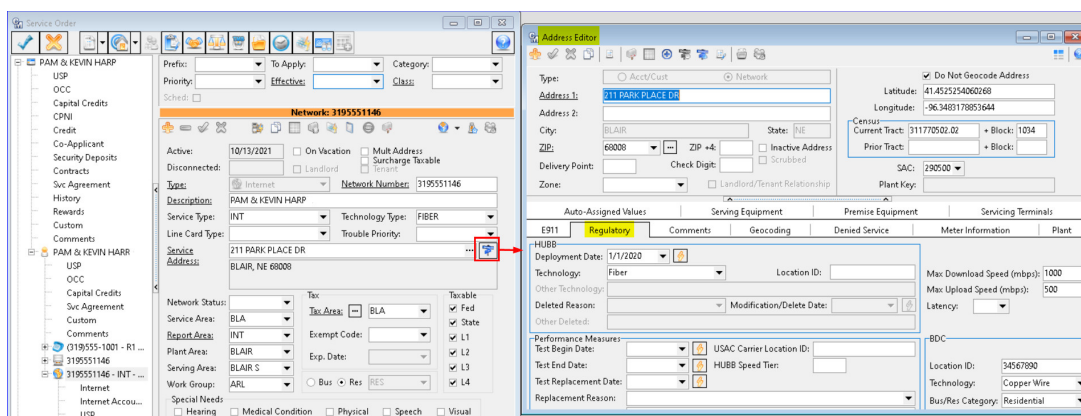
Use	Table Column
<input checked="" type="checkbox"/>	Failed Date
<input checked="" type="checkbox"/>	Failed Reason
<input type="checkbox"/>	Company
<input type="checkbox"/>	Account Number

Service Order View of Address Details

Service Order/Trouble Ticket View of Address Details

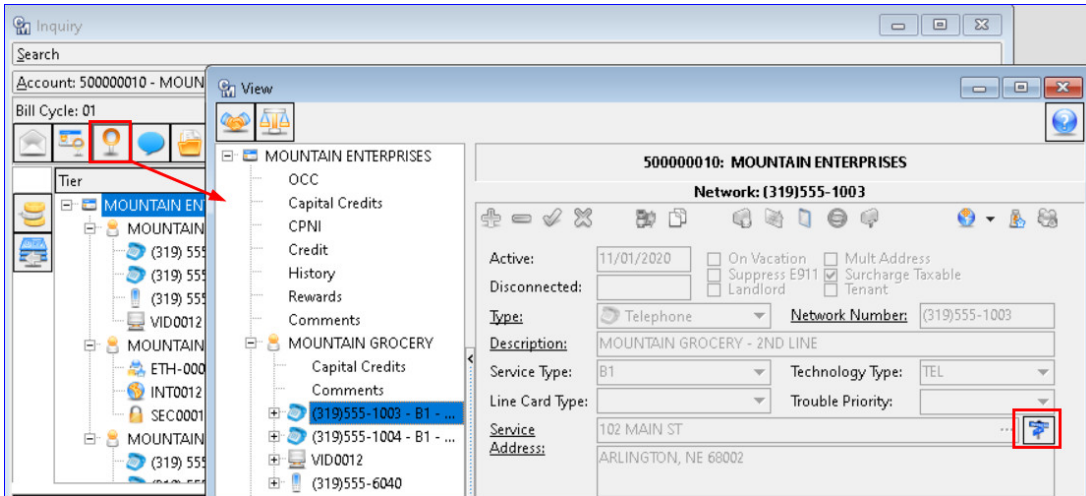
An “Address Editor” button was added next to the address field in Service Orders and Trouble Tickets for quick access to view address-related information without navigating to the Maintenance | Common | Address menu and searching for an address. This is a convenient way to view an address’s BDC, geospatial coordinates, technology, and regulatory information from the Service Order or Trouble Ticket.

Account Management Ribbon | Inquiry | Service Order/Sales Lead | Network Tier: An “Address Editor” button was added next to the network tier’s address field in a Service Order and Sales Lead so users can view address details for that network address without navigating to the Maintenance table. When the button is clicked the existing Address Editor for that network address opens. The tabs along the bottom will open to the last tab viewed for a quick view of address information. Address editing will be allowed based on assigned security roles.

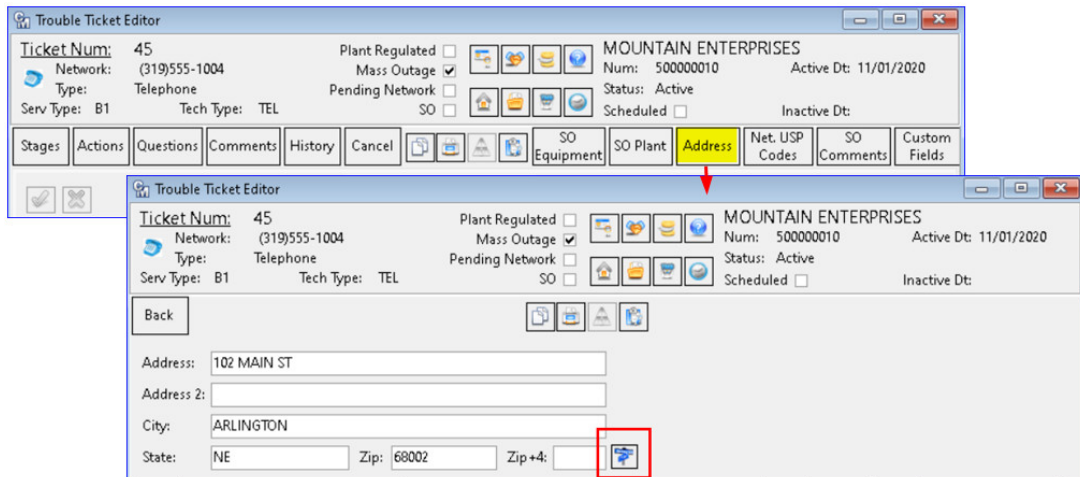


Account Management Ribbon | Inquiry | View: The Address Editor button can also be accessed when viewing a network in the View screen

from Inquiry.



Account Management Ribbon | Inquiry | Trouble Ticket Editor: An “Address Editor” button was also added next to the network tier’s address field in a Trouble Ticket so users can view address details for that network address without navigating to the Maintenance table. Address editing will be allowed based on assigned security roles.



Update Address by Network Grid Report

Plant Added to Address by Network Grid Report

[Reports Suite](#) | [Processing](#) | [Grid Reports](#) | [Address by Network](#): The “Address by Network” grid report was updated to include the following Plant information:

- Plant Code
- Plant Description
- Plant Status

When selected, each Plant Code, associated description, and Status will be in its own row in the report results. In this example, the new Plant Code/Description/Status options are selected and the report results display a row for each Plant Code for each network for a single address:

Grid Reports																
Settings		View		Address By Network												
Table																
Drag a column header here to group by that column																
Address 1	City	State	Zip Code	Latitude	Longitude	Census Tract	Census Block	SAC	Max Download Speed	Max Upload Speed	Network Number	Network Type	Network Description	Plant Code	Plant Description	Plant Status
542 HWY 999	BLAIR	NE	68008	41.5465472	-96.108544	311770502.02	1034	290500	250	100	INTD037	INT	JOHN & MARY JOHNSON	FIBER	014	Assigned
542 HWY 999	BLAIR	NE	68008	41.5465472	-96.108544	311770502.02	1034	290500	250	100	INTD037	INT	JOHN & MARY JOHNSON	GPON	N1-1-1-1-1-13	Assigned
542 HWY 999	BLAIR	NE	68008	41.5465472	-96.108544	311770502.02	1034	290500	250	100	INTD037	INT	JOHN & MARY JOHNSON	SPLIT	1-07	Assigned
542 HWY 999	BLAIR	NE	68008	41.5465472	-96.108544	311770502.02	1034	290500	250	100	INTD037	INT	JOHN & MARY JOHNSON	TERM	Blair West	Assigned
542 HWY 999	BLAIR	NE	68008	41.5465472	-96.108544	311770502.02	1034	290500	250	100	3195551037	TEL	JOHN & MARY JOHNSON	CRV	G1-0016	Assigned
542 HWY 999	BLAIR	NE	68008	41.5465472	-96.108544	311770502.02	1034	290500	250	100	3195551037	TEL	JOHN & MARY JOHNSON	FIBER	014	Assigned
542 HWY 999	BLAIR	NE	68008	41.5465472	-96.108544	311770502.02	1034	290500	250	100	3195551037	TEL	JOHN & MARY JOHNSON	GPON	N1-1-1-1-1-13	Assigned
542 HWY 999	BLAIR	NE	68008	41.5465472	-96.108544	311770502.02	1034	290500	250	100	3195551037	TEL	JOHN & MARY JOHNSON	SPLIT	1-07	Assigned
542 HWY 999	BLAIR	NE	68008	41.5465472	-96.108544	311770502.02	1034	290500	250	100	3195551037	TEL	JOHN & MARY JOHNSON	TERM	Blair West	Assigned
542 HWY 999	BLAIR	NE	68008	41.5465472	-96.108544	311770502.02	1034	290500	250	100	VID0037	CBL	JOHN & MARY JOHNSON	FIBER	014	Assigned
542 HWY 999	BLAIR	NE	68008	41.5465472	-96.108544	311770502.02	1034	290500	250	100	VID0037	CBL	JOHN & MARY JOHNSON	GPON	N1-1-1-1-1-13	Assigned
542 HWY 999	BLAIR	NE	68008	41.5465472	-96.108544	311770502.02	1034	290500	250	100	VID0037	CBL	JOHN & MARY JOHNSON	SPLIT	1-07	Assigned
542 HWY 999	BLAIR	NE	68008	41.5465472	-96.108544	311770502.02	1034	290500	250	100	VID0037	CBL	JOHN & MARY JOHNSON	TERM	Blair West	Assigned

Utility Billing: Budget Auto Calculation Tool

Budget Auto-Calculation Tool

When it's that time of year to compare customer payments with their actual usage for Budget accounts adjustments, an "Auto-Calculate Budget Processing" tool was created to allow users to do an automatic calculation of budget amounts. The tool allows users to auto-calculate the budget amounts or continue to enter manual budget amounts in the Special Billing screen as needed.

Suites | Receivables | Processing | Auto-Calculate Budget Processing: An "Auto-Calculate Budget Processing" tool was created for mass Budget processing calculations. All networks belonging to a budget account are on a budget but each network is calculated separately. The calculations in the processing screen will occur for all accounts in the grid and populate the Budget Amount to the account/networks in the Special Billing screen.

The required fields "Bill Cycle," "Effective Bill Date," "Budget Calculation" (By Address or By Network Tier,) and "Month Average" need to be populated before using the "Load Budget Accounts" button to pull in eligible accounts/networks for processing into the grid. Check boxes for "Include Previous Budget Balance in Calculation" and "Round to Nearest Dollar" can be checked if desired.

Clicking the "Load Budget Accounts" button will load and calculate based on the required field selections and the calculation will display in the "New Budget Amount" column. The "Effective Bill Date" and "New Budget Amount" column fields can be manually edited in the grid. Use the "Execute" button to save changes. If any changes are made to the required fields use the "Recalculate" button to recalculate the accounts/networks in the grid. The grid columns can be filtered and the right-click menu on the grid allows users to export the grid for reporting purposes.

Auto-Calculate Budget Processing

Bill Cycle: 01 Budget Calculations: By Network Tier

Effective Bill Date: 6/19/2023 Month Averages: 12

Include Previous Budget Balance in Calculation Round to Nearest Dollar

Load Budget Accounts

Account Number	Account Name	Network Type	Network Number	Current Budget Amount	Avg. Consumption	Avg. Usage	Avg. Demand Charge	Avg. Recurring Charge	Effective Bill Date	New Budget Amount
23344	SOPHIA KATZ	Electric	E0001	\$1,000.00	100	\$1,000.00			6/19/2023	\$1,000.00
23345	EMILY KATZ	Electric	E0002	\$1,025.00	100	\$1,000.00		\$25.00	6/19/2023	\$1,025.00
23345	EMILY KATZ	Water	W0002	\$525.00	50	\$500.00		\$25.00	6/19/2023	\$525.00
23346	MADDIE KATZ	Electric	E0003	\$1,025.00	100	\$1,000.00		\$25.00	6/19/2023	\$1,025.00
23346	MADDIE KATZ	Water	W0003	\$525.00	50	\$500.00		\$25.00	6/19/2023	\$525.00
23347	MORGAN KATZ	Electric	E0004	\$1,025.00	100	\$1,000.00		\$25.00	6/19/2023	\$1,025.00
23347	MORGAN KATZ	Water	W0004	\$525.00	50	\$500.00		\$25.00	6/19/2023	\$525.00
23348	MARGIE KATZ	Electric	E0005	\$1,025.00	100	\$1,000.00		\$25.00	6/19/2023	\$1,025.00
23348	MARGIE KATZ	Water	W0005	\$525.00	50	\$500.00		\$25.00	6/19/2023	\$525.00

Inquiry | Service Order | Credit Node | Special Billing: An “Auto-Calculate Budget” button was added to the Special Billing screen for quick access to the Auto-Calculate Budget process screen for a single account.

Special Billing

Auto-Calculate Budget

Network Tier	Funding Year	Utility Assistance Amount	Utility Assistance Balance
<No data to display>			

Budget Billing

Network Tier	Network Type	Budget Amount	Effective Bill Date	Changed By	Changed Date
E0002	Electric	\$154.00	4/19/2023	blockhart	5/12/2023 11:18:44 AM
W0002	Water	\$50.00	4/19/2023	blockhart	5/12/2023 11:18:44 AM

\$204.00

Clicking the Auto-Calculate Budget icon will load the current Account/Networks in the Auto-Calculate Budget Processing screen where users can make field selections and/or changes in the grid.

Auto-Calculate Budget Processing

Bill Cycle: 01 Budget Calculation: By Network Tier

Effective Bill Date: 6/19/2023 Month Average: 12

Include Previous Budget Balance in Calculation

Round to Nearest Dollar

Account Number	Account Name	Network Type	Network Number	Current Budget Amount	Avg. Consumption	Avg. Usage	Avg. Demand Charge	Avg. Recurring Charge	Effective Bill Date	New Budget Amount
23345	EMILY KATZ	Electric	E0002	\$1,025.00	100	\$1,000.00		\$25.00	6/19/2023	\$1,025.00
23345	EMILY KATZ	Water	W0002	\$525.00	50	\$500.00		\$25.00	6/19/2023	\$525.00

After executing the changes, the new budget amount is populated on the associated account under the Credit Node in the Special Billing screen.

Special Billing

Utility Assistance

Network Tier	Funding Year	Utility Assistance Amount	Utility Assistance Balance
<No data to display>			

Budget Billing

Network Tier	Network Type	Budget Amount	Effective Bill Date	Changed By	Changed Date
E0002	Electric	\$1,025.00	6/19/2023	sklich	5/18/2023 2:43:53 PM
W0002	Water	\$525.00	6/19/2023	sklich	5/18/2023 2:43:53 PM

\$1,550.00