

What's New in Calero VeraSMART 12.4

Features & Productivity Enhancements

Mobility

Reorganization of Mobile Catalog

Starting in version 12.4, mobility users will experience a change in the organizational structure of Mobility Catalogs.

- The concept of "Wireless Profiles" has been removed and replaced by a Vendor/Device Model/Plan/Feature configuration:
 - can include Accessories
 - can be limited by Security Groups
- VeraSMART now includes Wireless Plans *and* Wireless Features (prior to 12.4, everything was a Plan; there were no Features)
- After upgrade, Accessories will belong to one master catalog, instead of having separate catalogs that need to be maintained for each device model

The new mobility catalog configuration will determine which combination of Vendors/Device Models/Plans/Features/Accessories the end user sees and can select when moving through the mobility procurement process.

Why was the Mobility Catalog Reorganized?

- Enhancements were made to align "Plans" and "Features" relative to the way vendors treat them.
- New configuration ensures Mobile Carrier eBonding is possible.

Upgrade Process

When upgrading to 12.4, VeraSMART will attempt to infer whether previously configured "Plans" are still Plans or are more accurately "Features" – this determination will be based on the layout of data, and specifically based on the way Plans are configured on Device Models.

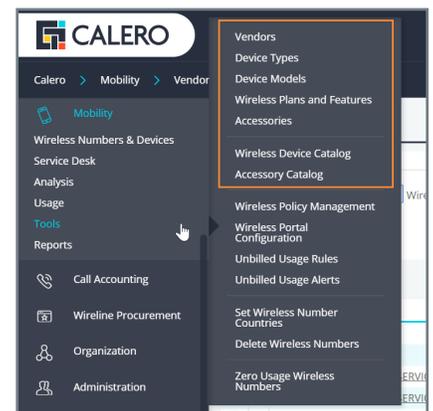
The upgrade process will also attempt to infer the "Feature Groups", and after the upgrade, there will only a single grouping of Features for each Vendor.

Recommendation

The upgrade process is designed to address most mobile catalog situations, but it is possible that there are some scenarios where there is not enough information in the system to properly make predictions.

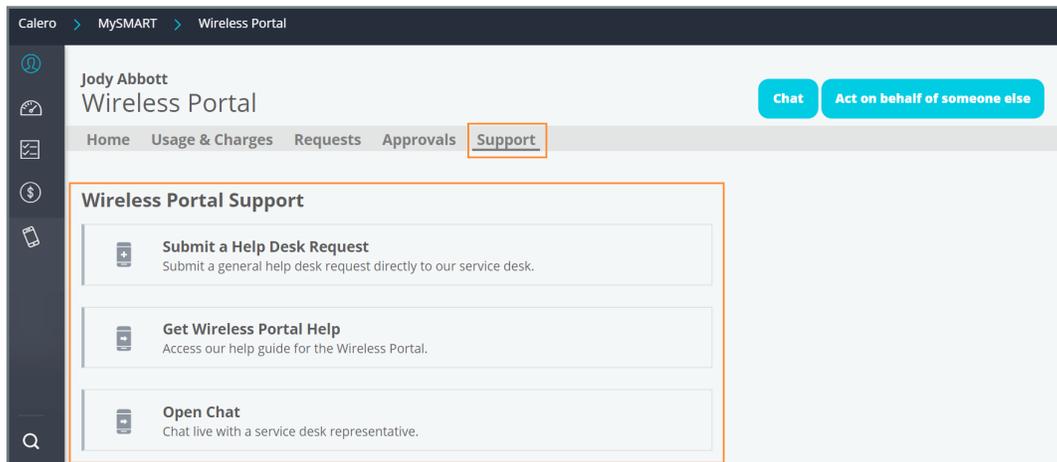
It is recommended that after the upgrade to 12.4, a Mobility Manager evaluates the state of the Plans, Features, and groupings and makes manual adjustments as necessary.

See the document [VeraSMART Mobility Catalog Changes_Upgrading to 12.4](#) for more information.



Wireless Portal 'Support' Tab Hidden

The 'Support' tab in the Wireless Portal can now be hidden by System Administrators.



Mobility > Tools > Wireless Portal Configuration

New Security Role

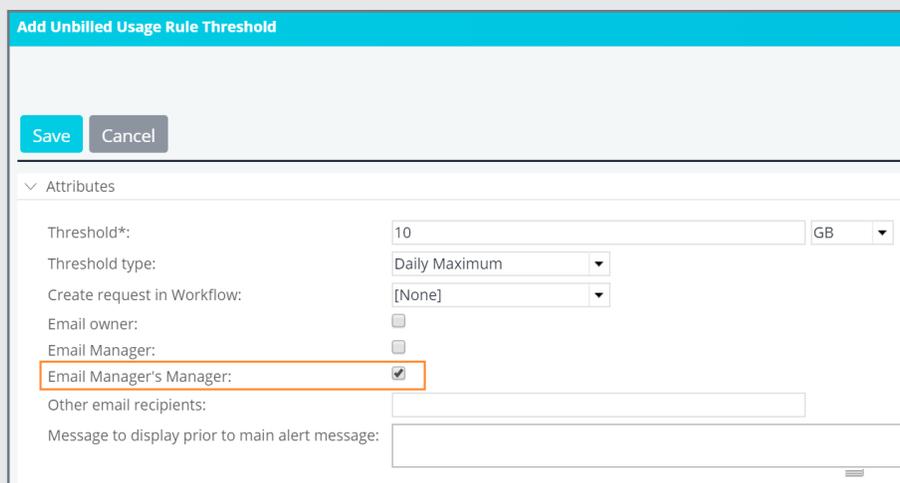
There is a new security role for reassignment of wireless numbers for personnel only - *Mobility Management: Reassign Wireless Number (Personnel only)*.

Unbilled Usage

Unbilled Usage Enhancements

12.4 introduces a number of improvements to the Unbilled Usage functionality.

- A new "Email Manager's Manager" option has been added to the Unbilled Usage threshold configuration page allowing the manager's manager to receive an e-mail.

A screenshot of the 'Add Unbilled Usage Rule Threshold' configuration page. The page has a blue header with the title. Below the header are 'Save' and 'Cancel' buttons. Under the 'Attributes' section, there are several fields: 'Threshold*' (10 GB), 'Threshold type' (Daily Maximum), 'Create request in Workflow' ([None]), 'Email owner' (checkbox), 'Email Manager' (checkbox), 'Email Manager's Manager' (checkbox, checked and highlighted with an orange box), 'Other email recipients' (text input), and 'Message to display prior to main alert message' (text input).

- The Billing Cycle for a wireless number has been reconfigured. It is now the one-month period with the end day determined by the vendor's "Bill Cycle ID".
 - The end day will always be one day before the start day in the next month.
 - Example: Start Day: March 2, 2019 End Day (Bill Cycle ID): April 1, 2019

- Mobility managers now have the ability to add a custom message on threshold alerts. This text will be included at the beginning of the email alert (if an email option is selected).

Add Unbilled Usage Rule Threshold

Save Cancel

Attributes

Threshold*: 10 GB

Threshold type: Daily Maximum

Create request in Workflow: [None]

Email owner:

Email Manager:

Email Manager's Manager:

Other email recipients:

Message to display prior to main alert message: Please read this email carefully and then contact your manager.

- Each unbilled usage alert now stores the account of the wireless number along with alert data. Both Wireless Number and the account number are available on the EZ Share and list view.
- A 'Created Date' field has been added to the Unbilled Usage Alerts list view as well as the Unbilled Usage alerts EZ Share to provide for better sorting and filtering.

See the document *Unbilled Usage User Guide* for more information.

Invoice Management

AP Feed Logs

VeraSMART 12.4 adds logging at the invoice level around AP Feed workflow steps to maintain a history of events. The new EZ-Share entity (AP Feed Log) can be used to export AP Feed log information, including when the feed was:

- Generated
- Regenerated
- Status Changed
- Invoice Removed from Feed
- Invoice Removed from Feed and Feed Deleted

New Invoice Alert

A new type of Invoice Alert – *Duplicate Invoice Number* – now identifies whether there is another invoice with that ID in the database during the import process. If there is, an alert will be generated that will provide the user with the relevant details, including the master account number, invoice date, and import ID number.

Delegate Approvers

Approvers can now assign delegate approvers for use in Invoice Processing approval workflows and other business processes.

A user can designate one delegate approver per business process via the "More Actions" drop-down menu on the MySMART My Approvals page.

Save Cancel

Rule Attributes Match Criteria Actions

Add Criteria

Creation date

Match when: Is in time range below

Between the hours of and (24 Hour Time)

Remove

AP Feed Type Blackout Dates

Version 12.4 adds the option to enable blackout dates for an AP Feed Type.

The screenshot shows the 'General' configuration page for an AP Feed Type. The 'Enable blackout periods' checkbox is checked. Below it, the 'Start Date' is set to 4/1/2019 and the 'End Date' is set to 4/30/2019. Other configuration options include AP Feed Type, EZ-Share, Secondary EZ-Share, Workflow, New status of feed after success, New status of feed after error, Disallow Invoices with future dates, Generate Invoice Trend Analysis, Check for missing, inactive, or invalid GL segments, and Generate a feed with no Invoices.

Other Enhancements

Enhanced Integration Capability

VeraSMART now features improved integration capability for mobility service requests and incidents. Added functionality will allow VeraSMART more flexibility when customer-service requests require interacting with external ITSM systems.

VeraSMART can now support transaction inputs of these types:

- Accessory Order
- Cancel Service
- Change Carrier
- Register Personal Device
- Release Liability
- Remove Personal Device
- Replace Device
- Resume Service
- Suspend Service
- Transfer of Liability
- Update Personal Device
- Upgrade Device

Enhanced ITSM integration will allow a single-incident entry process that can then get forwarded along to downstream systems for management. Alternatively, if customer partners manage mobility requests (outside of Calero), they can now receive forwarded requests to their system.

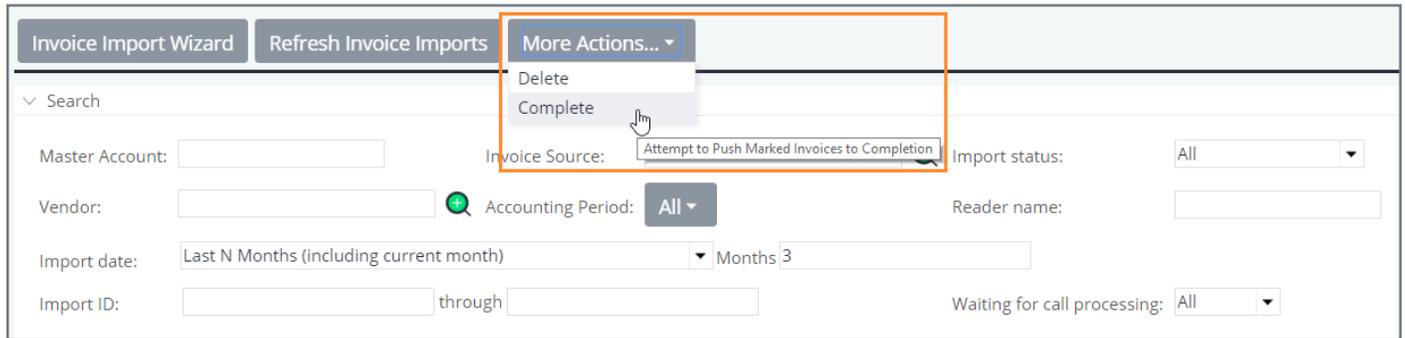
Match Criteria

A new match option is included for date-match criteria: *Is in time range below*. User can specify two integer hours (on a 24-hour time clock) for the chosen (date type) field's hour value to fall between. Example: Between the hours of [X] and [Y].

The screenshot shows the 'Match Criteria' configuration page. The 'Add Criteria' dropdown is expanded to show 'Creation date'. The 'Match when' dropdown is set to 'Is in time range below'. Below this, there are two input fields for hours, followed by 'and' and another input field, with '(24 Hour Time)' to the right. A 'Remove' button is at the bottom.

Complete Invoice Imports

Invoice managers can now manually “Complete” selected imports on the Invoice Imports page – this action will launch a background process that will attempt to finalize the selected imports. They will succeed unless the import is out of balance, a duplicate, or still in progress.



The screenshot shows the 'Invoice Import Wizard' interface. A dropdown menu titled 'More Actions...' is open, showing 'Delete' and 'Complete' options. A mouse cursor is hovering over the 'Complete' option. Below the menu, there are various search and filter fields: 'Master Account', 'Vendor', 'Import date' (set to 'Last N Months (including current month)' with 'Months 3'), 'Invoice Source' (set to 'Attempt to Push Marked Invoices to Completion'), 'Accounting Period' (set to 'All'), 'Import status' (set to 'All'), 'Reader name', 'Import ID' range, and 'Waiting for call processing' (set to 'All').

Multiple Approvals

A configuration option on Workflows now exists that restricts users from making multiple approvals on the same ticket/invoice/request.

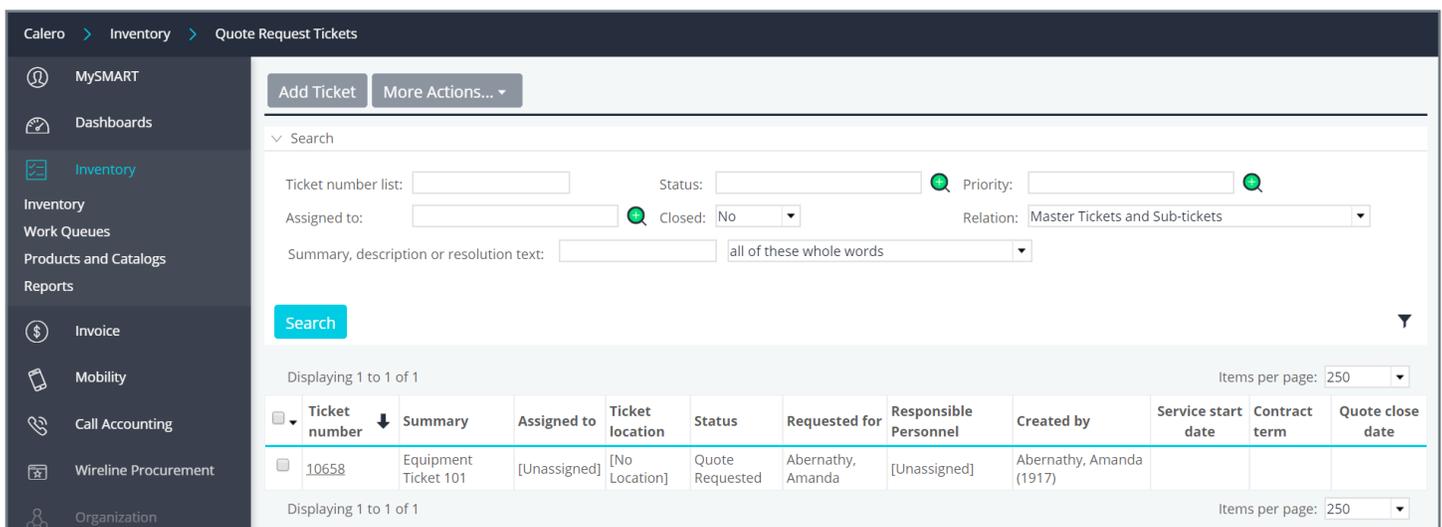
Invoice CDR Imports

The Invoice Import process has been improved to be considered complete even if the CDR hasn't been imported yet – this will allow for invoice processing to continue in a more timely fashion.

Additionally, Invoice Alerts will be generated even if the CDR data is still importing. (The 'Waiting for call processing' column will display 'Yes' on the Invoice Imports page if CDRs are still being imported.)

Vendor Quoting

VeraSMART 12.4 introduces a quote-to-order-management business process for Wireline Services. This process facilitates the entire quoting process, from the initial vendor-bid request all the way through to the creation of an inventory ticket – all manageable through VeraSMART.



The screenshot shows the 'Calero > Inventory > Quote Request Tickets' page. It features a search bar and a table of tickets. The table has columns for Ticket number, Summary, Assigned to, Ticket location, Status, Requested for, Responsible Personnel, Created by, Service start date, Contract term, and Quote close date. A single ticket is displayed with the following details:

Ticket number	Summary	Assigned to	Ticket location	Status	Requested for	Responsible Personnel	Created by	Service start date	Contract term	Quote close date
10658	Equipment Ticket 101	[Unassigned]	[No Location]	Quote Requested	Abernathy, Amanda	[Unassigned]	Abernathy, Amanda (1917)			

This new process supports:

- Creating a quote request within VeraSMART
- Emailing of the quote request to pre-configured vendors
- Vendors can reply with quote details (including their bid) or decline to bid
- A vendor portal that allows the vendor limited VeraSMART functionality to manage their bid
- Comparing quotes from various vendors
- Selecting a winning bid
- Real-time email communication with bidding vendors
- Moving the winning quote to an order to be fulfilled through a VeraSMART business process

This functionality provides visibility into vendor quoting process by providing a tracking mechanism for vendor quotes. It also automates building of inventory once a quote is chosen and provides the ability to compare competing vendor quotes in one location.

See the document [Vendor Quoting User Guide](#) for more information.