



Link Console

Printable Help

Version 10.0

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Abstract

This document is a printable version of Link Console help.

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Table of Contents

Introduction to Link Console.....	3
Log on to Link Console	3
Help Overview.....	4
Search feature.....	5
Search syntax	6
Wildcard expressions	6
Boolean operators	6
Nested expressions	7
Link Service	7
Link Service	7
Configure the Link Service	7
Start or Stop the Link Service.....	8
Link Settings and Options	8
Link Settings and Options	8
Specify Default Link Settings and Options	9
Specify Link Settings for a Customer or Class of Business	13
Settings Level Icons.....	16
Specify Link Options for a Customer or Class of Business	16
Copy Link Settings and Options	18
Delete Link Settings and Options.....	19

Introduction to Link Console

Link Console allows your organization to specify linking criteria for new accounts in Latitude and then link the accounts accordingly. You can configure the link service to run during a specific time period, and you can start and stop the service whenever you want.

Link Console uses a score-based model (link threshold) to determine whether to link accounts. Link Console doesn't link accounts until the specified amount of matching occurs. Link algorithms only run against new accounts in Latitude.

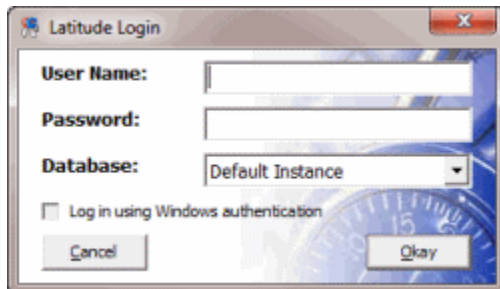
Log on to Link Console

Use the **Latitude Logon** dialog box to log on to Link Console.

To log on to Link Console

1. Do one of the following:
 - On your desktop, click the shortcut to Link Console.
 - Click **Start > All Programs > Latitude Software > Link Console**

The **Latitude Logon** dialog box appears.

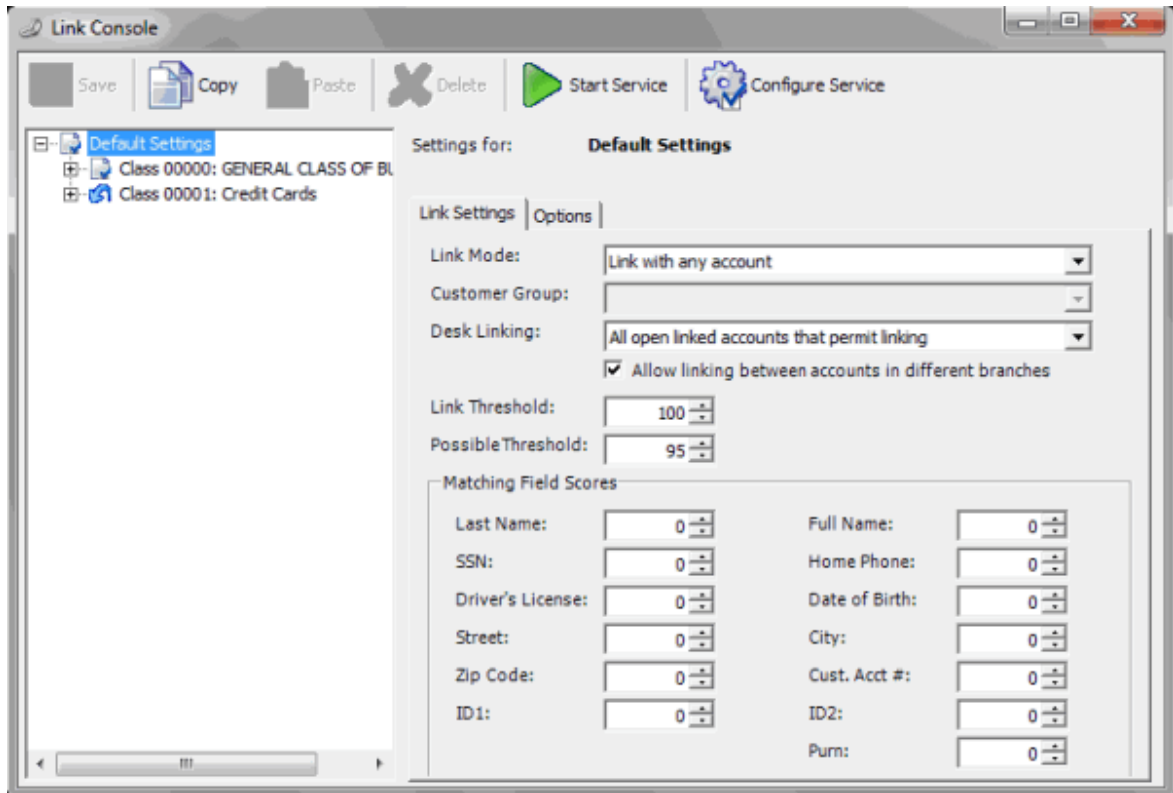


2. In the **User Name** box, type your Latitude user name.
3. In the **Password** box, type your Latitude password. As you type your password, periods display instead of the typed characters.

Note: To log on using Windows authentication, select the **Log in using Windows authentication** check box and provide your Windows user name and password.

4. Click **Okay**. The **Link Console** window appears.

Link Console Printable Help

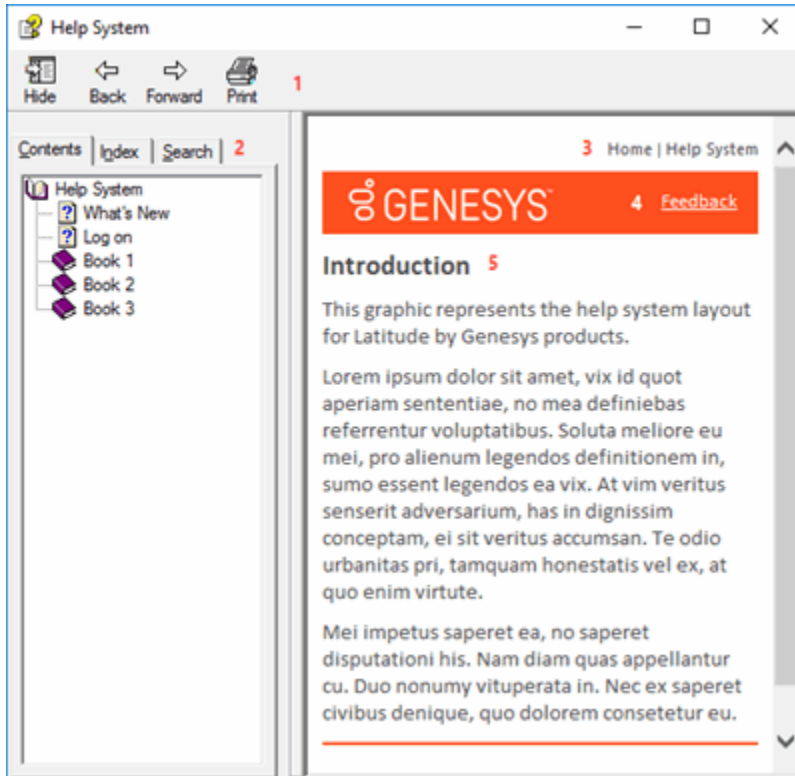


Help Overview

Link Console help provides you with information for using Link Console. Use the table of contents, index, and search features to locate and view a help topic.

To open help

In the "\\Latitude Software\Documents" folder, double-click **LinkConsole.chm**. The **Link Console Help** window appears.



Tip: To adjust the width and height of the window or its panes, click the edge of the window or pane and drag it up or down, left or right.

1. **Toolbar:** Displays options for the help window.
2. **Tabs:** Displays the following:

Contents: Displays the table of contents. To display a topic in the **Content** pane, expand a book and then click the link.

Index: Displays the index. To display a topic in the **Content** pane, type a keyword or phrase in the box (or scroll through the list) and then click the link in the list.

Search: Displays the [search feature](#). To display a topic in the **Content** pane, type a keyword or phrase in the box and then press **Enter**. In the search results, click the link.

3. **Breadcrumbs:** Displays your current location within the help system. When you click a breadcrumb, the related topic displays.
4. **Content toolbar:** Displays an option to send feedback through an email message to Latitude by Genesys Documentation.
5. **Content pane:** Displays the contents of a topic. To view the **Content** pane menu, right-click in the **Content** pane.

Search feature

You can use the search feature to search for topics that contain words or phrases that you specify. You formulate a search query following a specific [set of rules](#). You can include [wildcard expressions](#), [Boolean operators](#), and [nested expressions](#) in your search query. A list of topics that match your search criteria

appear in the search results. When you click a topic title in the search results, the content of that topic appears in the **Content** pane.

Search syntax

The basic rules for formulating search queries are:

- Searches are not case-sensitive, meaning you can type uppercase or lowercase characters.
- You cannot search for a single character or the following reserved words: an, and, as, at, be, but, by, do, for, from, have, he, in, it, not, of, on, or, she, that, the, there, they, this, to, we, which, with, you.
- The search engine ignores punctuation marks and special characters such as @#\$%^&()+=[]\.
- Enclose phrases and terms that include a period (such as a file name with an extension) in double quotation marks.

Wildcard expressions

Wildcard expressions allow you to search for one or more characters using a question mark or asterisk. A question mark represents a single character, while an asterisk represents one or more characters.

Search for...	Example	Result
Topics with text that starts with one or more specified characters and ends in any character or number of characters	log or log*	Returns all topics with text that starts with the specified characters (for example, log, logon, logging).
Topics with text that starts with the specified characters, has a single character that can be anything, and ends in the specified characters	32?57	Returns all topics with text that has any character where you placed a question mark (for example, 32?57 returns 32257, 32457, and 32857).
Topics that contain all the words specified, in any order or placement within the topic	account status	Returns all topics with both account and status, but not necessarily as a phrase or in the order specified. For example, the search returns topics with "the account status..." or "the status of the account..."
Topics that contain the specified phrase	"account status"	Returns all topics with account status as a phrase. For example, the search returns topics with "the account status..." but not "the status of the account..."

Boolean operators

Boolean operators (AND, OR, NOT, NEAR) allow you to create a relationship between terms. If you don't specify an operator, the system uses AND by default.

Search for...	Example	Result
AND	account AND status	Returns all topics with both account and status, but not necessarily as a phrase or in the order specified. For example, the search returns topics with "the account status..." or "the status of the account..."
OR	account OR status	Returns all topics with either account or status, or both.
NOT	account NOT status	Returns all topics with account but not status.
NEAR	account NEAR status	Returns all topics where account is within eight words of status.

Nested expressions

Nested expressions allow you to perform complex searches. For example, queue AND ((collector OR clerical) not supervisor) finds topics containing queue and collector but not supervisor, or containing queue and clerical but not supervisor. As with mathematical expressions, the system evaluates expressions in parentheses first. If there is no parenthesis, the system evaluates the expression from left to right. For example, queue NOT (clerical OR supervisor) finds topics containing queue but not clerical or supervisor. Queue NOT clerical OR supervisor finds topics containing queue but not clerical, or topics containing supervisor.

Link Service

Link Service

Use the **Configure Linking Service** dialog box to configure the link service. You specify when to start and stop the link service, the frequency in which to review new accounts, and the maximum number of accounts to review at one time. The link service runs during the specified time period and analyzes new accounts based on the settings and links accounts accordingly. Link Console flags reviewed accounts to avoid reviewing them again.

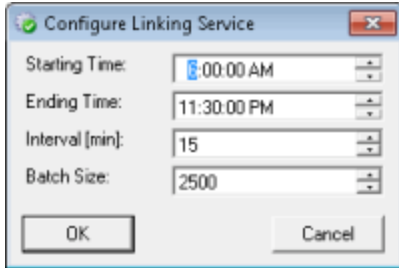
Configure the Link Service

Use the **Configure Linking Service** dialog box to specify the schedule for linking accounts. If you don't have the appropriate permissions in the MSDB SQL Server database, you cannot configure, start, or stop the link service. Your SQL Server administrator sets these permissions in accordance with your organization's security policies.

Note: If you are a hosted client, don't run this service because it runs automatically each night.

To configure the link service

1. In the toolbar, click **Configure Service**. The **Configure Linking Service** window appears.



Starting Time: Time of day to start running the link service.

Ending Time: Time of day to stop running the link service.

Interval (min): Frequency (in minutes) in which to review new accounts.

Batch Size: Maximum number of accounts to process at one time (to prevent system overload). Link Console processes in the next run, accounts not in the first batch run.

2. Complete the information and then click **OK**.

Start or Stop the Link Service

Use the **Link Console** window to start or stop the link service. The link service performs behind-the-scenes processing based on the schedule specified in the **Configure Linking Service** dialog box. Once you start the link service, you can close or open Link Console without affecting the linking process.

If you don't have the appropriate permissions in the SQL Server database, you cannot configure, start, or stop the link service. Your SQL Server administrator sets these permissions in accordance with your organization's security policies.

To start or stop the link service

1. To start the link service, in the toolbar, click **Start Service**. If your organization didn't configure the link service, you cannot start it. For more information, see [Configure the Link Service](#).
2. To stop the link service, in the toolbar, click Stop Service. Link Console stops the link schedule. Link Console doesn't interrupt any linking processes running already.

Link Settings and Options

Link Settings and Options

Use the **Link Settings** and **Options** tabs in the **Link Console** window to specify whether to link new accounts and how to link them. You can specify custom link settings for accounts associated to a class of business or for accounts associated to a customer. Link Console applies default link settings to accounts that don't have custom link settings established.

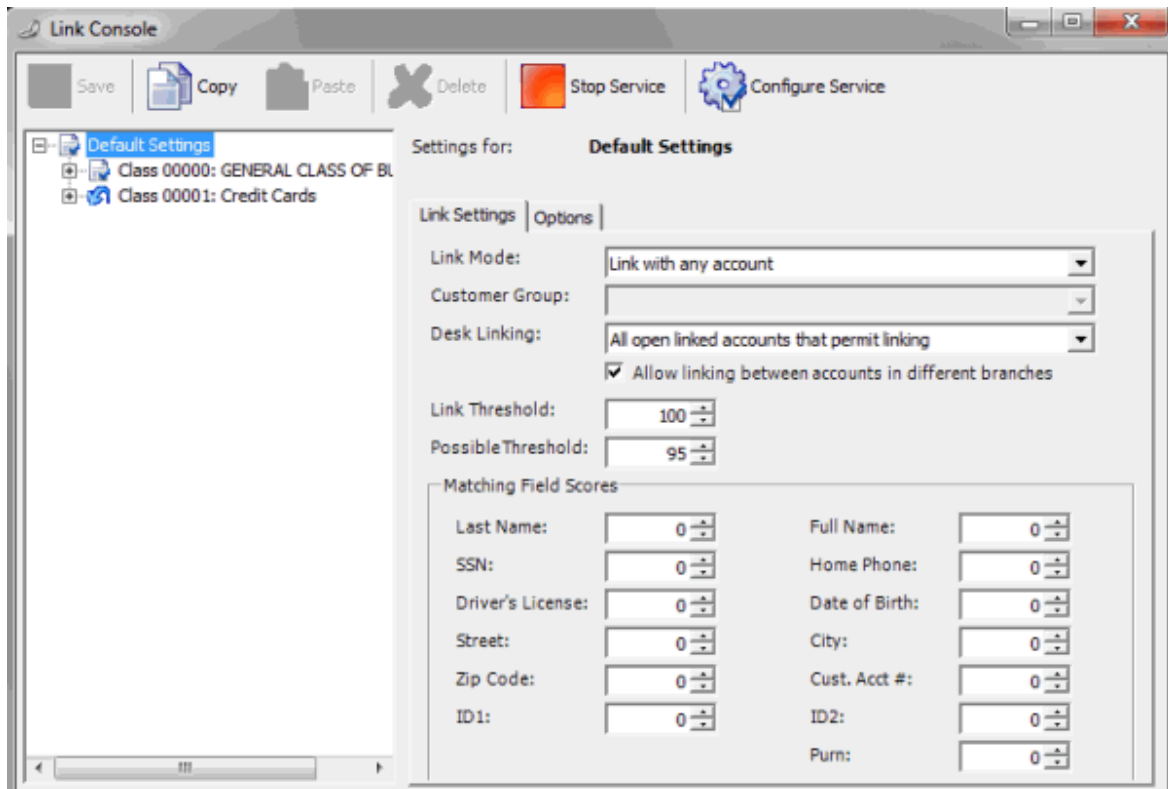
Your organization assigns customers to a class of business in Latitude. For more information, see the *Latitude* documentation.

Specify Default Link Settings and Options

Use the **Link Settings** and **Options** tabs to specify the default link settings and options. Link Console applies default settings and options to all customer accounts that do not have custom link settings applied.

To specify default link settings and options

1. In the **Navigation** pane, click **Default Settings**. The default settings appear on the **Link Settings** tab.



Link Mode: Method for linking accounts. Valid values are:

Do not link: Link Console doesn't link accounts.

Link within same customer: If accounts belong to the same customer, Link Console links the accounts that meet the link threshold criteria.

Link within same class of business: If accounts belong to the same class of business, Link Console links the accounts that meet the link threshold criteria.

Link within custom groups: If accounts belong to a customer with the specified customer group, Link Console links the accounts that meet the link threshold criteria. Typically, this option is not applicable for default settings.

Link with any account: Link Console links with any account that meets the link threshold criteria.

Customer Group: Customer group to link. This option is available if **Link within custom groups** is the **Link Mode**. Typically, this option is not applicable for default settings.

Desk Linking: Defines how the linking service treats a new account when Link Console matches it to a linked account and the desk for an account in that link doesn't permit linking. Valid values are:

All open linked accounts that permit linking: If all open accounts in the existing link belong to a desk that permits linking, the new account joins the link. If there are no open accounts in the existing link, the new account cannot join the link unless all closed accounts belong to desks that allow linking.

Any open linked account that permits linking: If at least one open account in the existing link belongs to a desk that permits linking, the new account joins the link. If there are no open accounts in the existing link, the new account cannot join the link unless at least one closed account belongs to a desk that permits linking.

All accounts linked that permit linking: If all accounts (open and closed) in the existing link belong to a desk that permits linking, the new account joins the link.

Any account linked that permits linking: If at least one account (open or closed) in the existing link belongs to a desk that permits linking, the new account joins the link.

Allow linking between accounts in different branches: If selected, Link Console allows account linking between branches. If accounts belong to separate branches, Link Console moves the accounts to the same desk automatically, if you selected that option on the **Options** tab.

Link Threshold: Level of criteria accounts must meet to warrant linking. Link Console sums the **Matching Field Scores** and if the sum is greater than the threshold, Link Console links the accounts. The higher the value applied to each **Matching Field Score**, the more weight the field has in determining a match.

Possible Threshold: Level of criteria an account must meet for the system to add the account to the list of accounts that almost meet the threshold criteria. Use this list to link accounts manually.

Matching Field Scores: Scores used to determine whether accounts meet enough criteria to warrant linking. The higher the score, the more weight the field has in determining a debtor match.

Last Name: Debtor's last name. Uses an algorithm to determine phonetic similarity.

Note: The system applies the weight assigned to Last Name to the total score only when there is no match on Full Name. If a match occurs for Full Name, the system doesn't apply the weight assigned to Last Name to the total score.

Full Name: Debtor's full name. Uses an algorithm to determine phonetic similarity.

SSN: Debtor's social security number, without formatting.

Home Phone: Debtor's home phone number, without formatting.

Driver's License: Debtor's driver's license number.

Date of Birth: Debtor's date of birth.

Street: Debtor's street address. Link Console removes spaces and only evaluates the first 10 characters.

City: Debtor's city. Link Console removes spaces and only evaluates the first eight characters.

ZIP Code: Debtor's postal code. Link Console removes formatting and only evaluates the first five digits.

County: Debtor's county.

Country: Debtor's country.

Cust Acct #: Customer account number.

ID 1: Unique identifier number one.

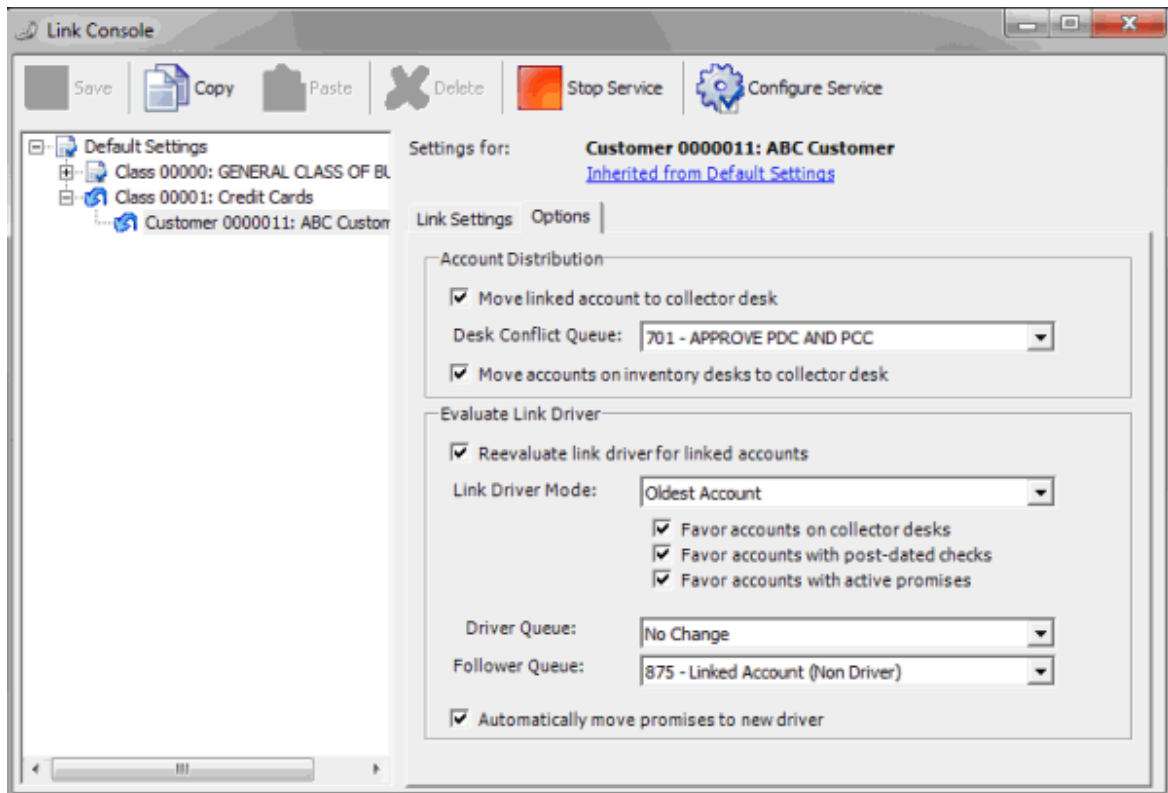
ID 2: Unique identifier number two.

Purn: (Personal Unique Record Number). Alphanumeric code that an outside provider such as a credit bureau assigns to uniquely identify a person.

The following example illustrates how Link Console handles linking when you set the link threshold to 101. The numbers in parentheses indicate the score assigned to the field.

Matching Fields	Score	Action
Last Name (25) + SSN (95)	120	Link accounts
ZIP Code (10) + Full Name(50) + Home Phone (10)	70	Possible table
Full Name (50) + Date of Birth (45) + City (10)	105	Link accounts
Street (25) + City (10) + ZIP Code (10) + Cust. Acct# (10)	55	No action

2. Complete the information and then click the **Options** tab.



The settings in the **Account Distribution** section determine whether Link Console redistributes newly linked accounts to other desks, and how.

Move linked account to collector desk: If selected, Link Console moves linked accounts to a collector desk after linking. The system evaluates all the accounts in the linked group to determine the receiving collector desk. If a collector only worked one account, the desk assigned to that account receives the linked accounts. If there is a conflict (multiple desks, multiple worked), Link Console moves the account to the queue specified in the **Desk Conflict Queue** list box. If cleared, accounts remain assigned to their current desk.

Desk Conflict Queue: Supervisor queue level (700-799) to receive the linked accounts when multiple collectors have worked the accounts. If you selected the **Move linked account to collector desk** check box, specify a desk conflict queue.

Move accounts on inventory desks to collector desk: If selected, Link Console moves linked accounts assigned to an inventory desk to a collector desk after linking.

The settings in the **Evaluate Link Driver** section determine how Link Console sets the link driver once it links new accounts. The link driver is the only account that is queued for collection within the group of linked accounts. You can only set one account as the link driver in the linked group, and that account must have an active status.

Note: Evaluation of the account link driver resets the queue date automatically. Link Console sets the queue date to the current date, unless a collector worked the account today. If a collector worked the account today, Link Console sets the queue date to the following day.

Reevaluate link driver for linked accounts: If selected, your organization wants the link driver set (or reset) for accounts that Link Console just linked.

Link Driver Mode: Account within the group of linked accounts to set as the link driver. If you selected the **Reevaluate link driver for linked accounts** check box, specify an account.

Note: If you selected any of the following check boxes, Link Console ignores the **Link Driver Mode** setting.

Favor accounts on collector desks: If selected, Link Console weighs the account link driver toward an account in the group that belongs to a collector desk.

Favor accounts with post-dated checks: If selected, Link Console weighs the account link driver toward an account in the group with post-dated checks assigned.

Favor accounts with active promises: If selected, Link Console weighs the account link driver toward an account in the group with active promises.

Driver Queue: Queue level to set on the link driver account.

Follower Queue: Queue level to set on follower (non-link driver) accounts.

Automatically move promises to new driver: If selected, Link Console moves existing promise, PDC, and credit card arrangements from a follower account to the link driver account when the link driver account changes.

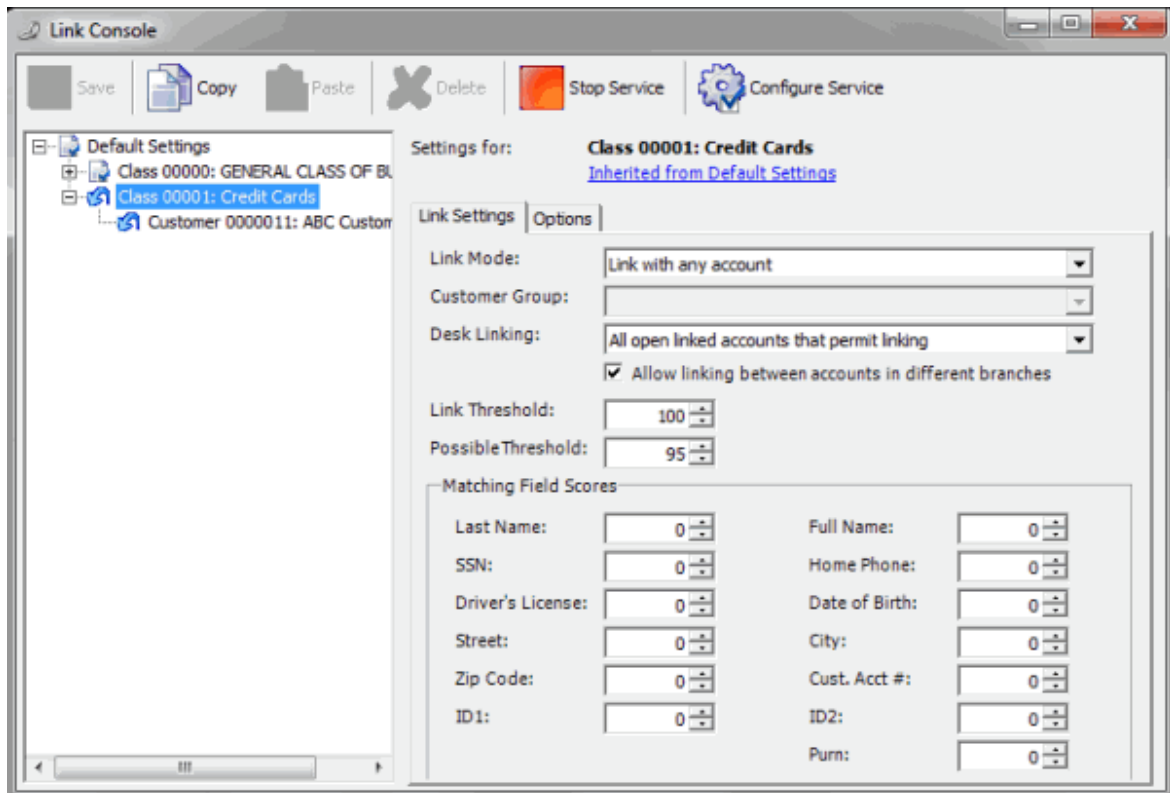
3. Complete the information and then, in the toolbar, click **Save**.

Specify Link Settings for a Customer or Class of Business

Use the **Link Settings** tab to specify the link settings for a customer or class of business. If your organization defined default settings, these custom settings override the default settings.

To specify link settings for a customer or class of business

1. In the **Navigation** pane, do one of the following:
 - To specify settings for a customer, expand a class of business and then click the customer.
 - To specify settings for a class of business, click the class of business.
2. Click the **Link Settings** tab.



Settings for: Level at which the settings apply: default, specific class of business, or specific customer.

Inherited from Default Settings: If your organization didn't define custom settings at the selected level, this link appears. Click the link to display the default settings.

Link Mode: Method for linking accounts. Valid values are:

Do not link: Link Console doesn't link the accounts.

Link within same customer: If accounts belong to the same customer, link the accounts that meet the link threshold criteria.

Link within same class of business: If accounts belong to the same class of business, link the accounts that meet the link threshold criteria.

Link within custom groups: If accounts belong to a customer with the specified customer group, link the accounts that meet the link threshold criteria. Typically, this option is not applicable for default settings.

Link with any account: Link with any account that meets the link threshold criteria.

Customer Group: Customer group to link. This option is available if **Link within custom groups** is the **Link Mode**. Typically, this option is not applicable for default settings.

Desk Linking: Defines how the linking service treats a new account when Link Console matches it to a linked account and the desk for an account in that link doesn't permit linking. Valid values are:

All open linked accounts that permit linking: If all open accounts in the existing link belong to a desk that permits linking, the new account joins the link. If there are no open accounts in the existing link, the new account cannot join the link unless all closed accounts belong to desks that allow linking.

Any open linked account that permits linking: If at least one open account in the existing link belongs to a desk that permits linking, the new account joins the link. If there are no open accounts in the existing link, the new account cannot join the link unless at least one closed account belongs to a desk that permits linking.

All accounts linked that permit linking: If all accounts (open and closed) in the existing link belong to a desk that permits linking, the new account joins the link.

Any account linked that permits linking: If at least one account (open or closed) in the existing link belongs to a desk that permits linking, the new account joins the link.

Allow linking between accounts in different branches: If selected, Link Console allows account linking between branches. If accounts belong to separate branches, Link Console moves the accounts to the same desk automatically, if you selected that option on the **Options** tab.

Link Threshold: Level of criteria accounts must meet to warrant linking. Link Console sums the **Matching Field Scores** and if the sum is greater than the threshold, Link Console links the accounts. The higher the value applied to each **Matching Field Score**, the more weight the field has in determining a match.

Possible Threshold: Level of criteria an account must meet for the system to add the account to the list of accounts that almost meet the threshold criteria. Use this list to link accounts manually.

Matching Field Scores: Scores used to determine whether accounts meet enough criteria to warrant linking. The higher the score, the more weight the field has in determining a debtor match.

Last Name: Debtor's last name. Uses an algorithm to determine phonetic similarity.

Note: The system applies the weight assigned to Last Name to the total score only when there is no match on Full Name. If a match occurs for Full Name, the system doesn't apply the weight assigned to Last Name to the total score.

Full Name: Debtor's full name. Uses an algorithm to determine phonetic similarity.

SSN: Debtor's social security number, without formatting.

Home Phone: Debtor's home phone number, without formatting.

Driver's License: Debtor's driver's license number.

Date of Birth: Debtor's date of birth.

Street: Debtor's street address. Link Console removes spaces and only evaluates the first 10 characters.

City: Debtor's city. Link Console removes spaces and only evaluates the first eight characters.

ZIP Code: Debtor's postal code. Link Console removes formatting and only evaluates the first five digits.

County: Debtor's county.

Country: Debtor's country.

Cust Acct #: Customer account number.

ID 1: Unique identifier number one.

ID 2: Unique identifier number two.

Purn: (Personal Unique Record Number). Alphanumeric code that an outside provider such as a credit bureau assigns to uniquely identify a person.



The following example illustrates how Link Console handles linking when you set the link threshold to 101. The numbers in parentheses indicate the score assigned to the field.

Matching Fields	Score	Action
Last Name (25) + SSN (95)	120	Link accounts
ZIP Code (10) + Full Name(50) + Home Phone (10)	70	Possible table
Full Name (50) + Date of Birth (45) + City (10)	105	Link accounts
Street (25) + City (10) + ZIP Code (10) + Cust. Acct# (10)	55	No action

- Complete the information and then, in the toolbar, click **Save**.

Settings Level Icons

The following table lists the settings level icons that appear in the **Navigation** pane and their description.

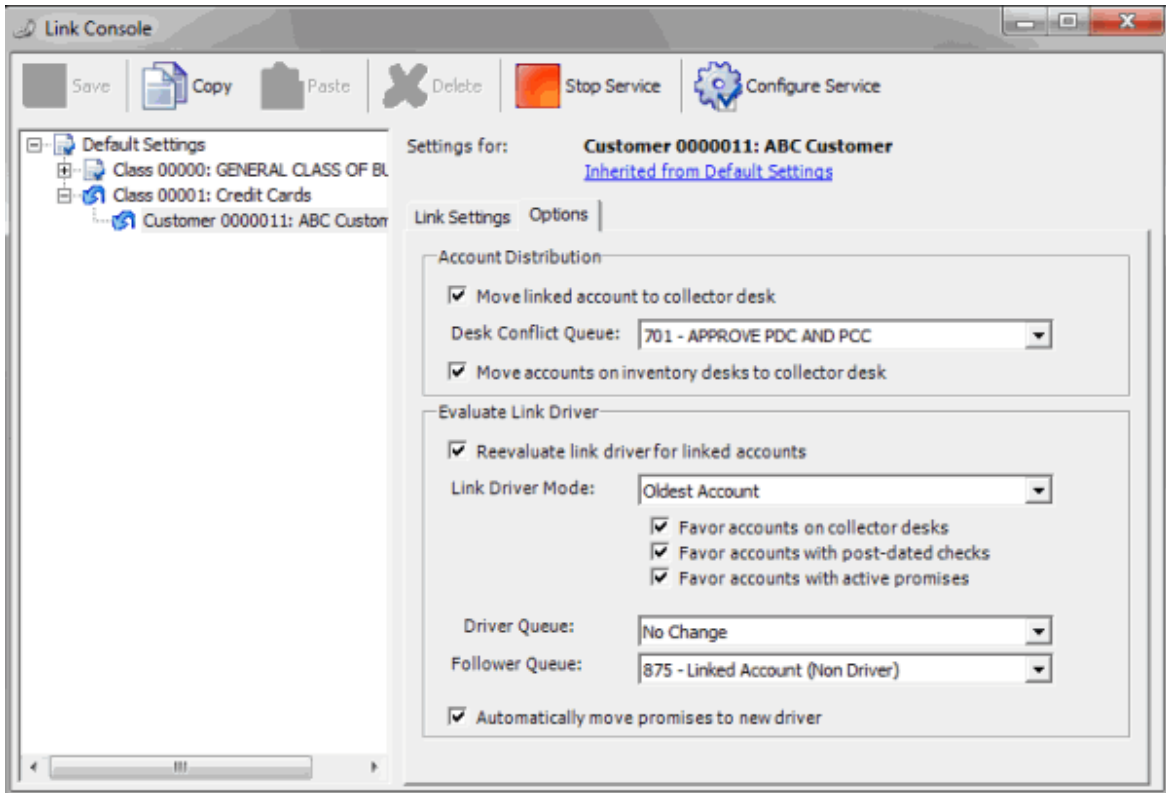
Icon	Description
	Link Console applies default settings at this level.
	Link Console applies custom settings at this level.

Specify Link Options for a Customer or Class of Business

Use the **Options** tab to specify the link options for a customer or class of business. If your organization defined default options, these options override the default options.

To specify link options for a customer or class of business

- In the **Navigation** pane, do one of the following:
 - To specify options for a customer, expand a class of business and then click the customer.
 - To specify options for a class of business, click the class of business.
- Click the **Options** tab.



Account Distribution section: These settings determine whether Link Console redistributes newly linked accounts to other desks, and how.

Move linked account to collector desk: If selected, Link Console moves linked accounts to a collector desk after linking. Link Console evaluates all the accounts in the linked group to determine the receiving collector desk. If a collector only worked one account, the desk assigned to that account receives the linked accounts. If there is a conflict (multiple desks, multiple worked), Link Console moves the account to the queue specified in the **Desk Conflict Queue** list box. If cleared, accounts remain assigned to their current desk.

Desk Conflict Queue: Supervisor queue level (700-799) to receive the linked accounts when multiple collectors have worked the accounts. If you selected the **Move linked account to collector desk** check box, specify a desk conflict queue.

Move accounts on inventory desks to collector desk: If selected, Link Console moves linked accounts assigned to an inventory desk to a collector desk after linking.

Evaluate Link Driver section: These settings determine how Link Console sets the link driver once it links new accounts. The link driver is the only account that is queued for collection within the group of linked accounts. You can only set one account as the link driver in the linked group, and that account must have an active status.

Note: Evaluation of the account link driver resets the queue date automatically. Link Console sets the queue date to the current date, unless a collector worked the account today. If a collector worked the account today, Link Console sets the queue date to the following day.

Reevaluate link driver for linked accounts: If selected, your organization wants the link driver set (or reset) for accounts that Link Console just linked.

Link Driver Mode: Account within the group of linked accounts to set as the link driver. If you selected the **Reevaluate link driver for linked accounts** check box, specify an account.

Note: If you selected any of the following check boxes, Link Console ignores the **Link Driver Mode** setting.

Favor accounts on collector desks: If selected, Link Console weighs the account link driver toward an account in the group that belongs to a collector desk.

Favor accounts with post-dated checks: If selected, Link Console weighs the account link driver toward an account in the group with post-dated checks assigned.

Favor accounts with active promises: If selected, Link Console weighs the account link driver toward an account in the group with active promises.

Driver Queue: Queue level to set on the link driver account.

Follower Queue: Queue level to set on follower (non-link driver) accounts.

Automatically move promises to new driver: If selected, Link Console moves existing promise, PDC, and credit card arrangements from a follower account to the link driver account when the link driver account changes.

3. Complete the information and then, in the toolbar, click **Save**.

Copy Link Settings and Options

Use the **Link Console** window to copy link settings and options from the default settings, a specific customer, or a specific class of business to another customer or class of business. You can also copy link settings and options from a specific customer or class of business to the default settings.

To copy link settings and options

1. In the **Navigation** pane, do one of the following:
 - To copy settings and options from the default settings, click **Default Settings**.
 - To copy settings and options from a customer, expand a class of business and then click the customer.
 - To copy settings and options from a class of business, click the class of business.
2. In the toolbar, click **Copy**. Link Console copies the settings and options to the Clipboard.
3. Do one of the following:
 - To copy the settings and options to the default settings, click **Default Settings**.
 - To copy the settings and options to a customer, expand a class of business and then click the customer.
 - To copy the settings and options to a class of business, click the class of business.
4. In the toolbar, click **Paste**. Link Console copies the settings and options from the Clipboard to the specified customer, class of business, or the default settings.
5. In the toolbar, click **Save**.

Delete Link Settings and Options

Use the **Link Console** window to delete link settings and options for a customer or class of business. If your organization defined default settings and options, Link Console uses the default settings and options in place of the deleted settings and options.

To delete link settings and options

1. In the **Navigation** pane, do one of the following:
 - To delete settings and options for a customer, expand a class of business and then click the customer.
 - To delete settings and options for a class of business, click the class of business.
2. In the toolbar, click **Delete**. A confirmation dialog box appears.
3. Click **OK**. Link Console deletes the settings and options from the specified customer or class of business.