



AIM Receiver Manager

Printable Help

Version 10.0

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Abstract

This document is a printable version of AIM Receiver Manager help.

For copyright and trademark information, see https://help.genesys.com/latitude/10/desktop/Copyright_and_Trademark_Information.htm.

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Introduction to AIM Receiver Manager

AIM Receiver Manager allows you to transfer information between AIM (Agency/Attorney Interface Manager) clients and outside collection agencies and attorneys. It exports and imports data using XML file layouts that are proprietary to AIM.

What's New in AIM Receiver Manager

The following Service Updates (SU) introduced changes and enhancements in AIM Receiver Manager 10.0.

SU 8

Complaints

- Added **Complaint (CCPT)** option to the **Process** tab in the **Client Configuration** window for importing complaints. For more information, see Import Complaints.
- Added **Complaint (ACPT)** option to the **Process** tab in the **Client Configuration** window for exporting complaints. For more information, see Export Complaints.

Disputes

- Added **Dispute (CDIS)** option to the **Process** tab in the **Client Configuration** window for importing disputes. For more information, see Import Disputes.
- Added **Dispute (ADIS)** option to the **Process** tab in the **Client Configuration** window for exporting disputes. For more information, see Export Disputes.

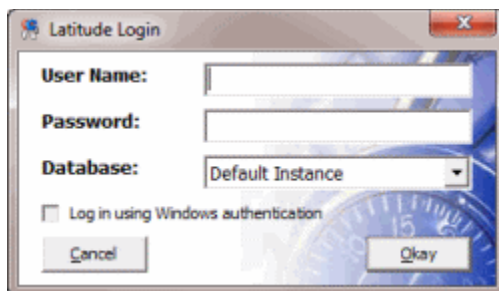
Log on to AIM Receiver Manager

Use the **Latitude Logon** dialog box to log on to AIM Receiver Manager.

To log on to AIM Receiver Manager

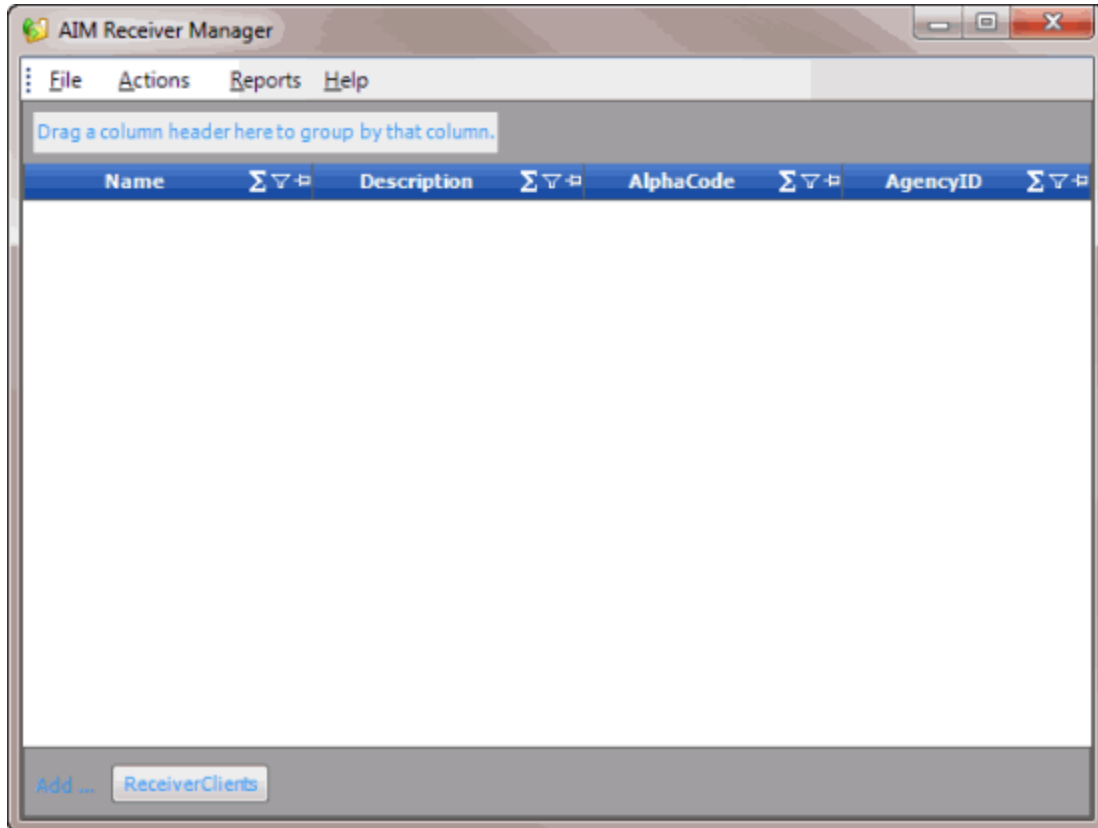
1. Do one of the following:
 - On your desktop, click the shortcut to AIM Receiver Manager.
 - Click **Start > All Programs > Latitude Software > Agency Interface Manager > AIM Receiver**.

The **Latitude Logon** dialog box appears.



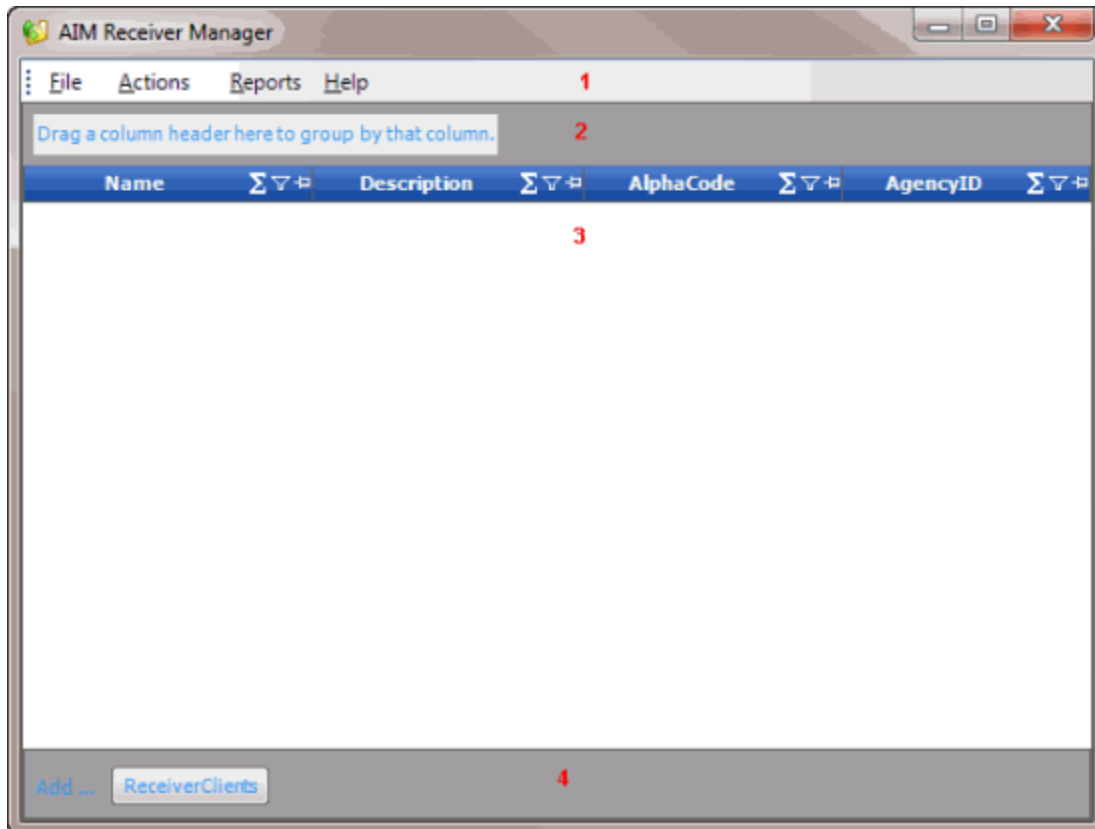
Note: Premises-based clients can use Windows authentication to bind Latitude users to their Windows identity to permit logging on to Latitude automatically. Windows authentication is not available for hosted clients. To log on using Windows authentication, select the **Log in using Windows authentication** check box and provide your Windows user name and password.

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.
4. Click **Okay**. The **AIM Receiver Manager** window appears.



Overview of AIM Receiver Manager Window

The **AIM Receiver Manager** window is the main window in AIM Receiver Manager. It allows you to specify settings for an outside collection agency or attorney, import data received from the customer, and export data to the customer.



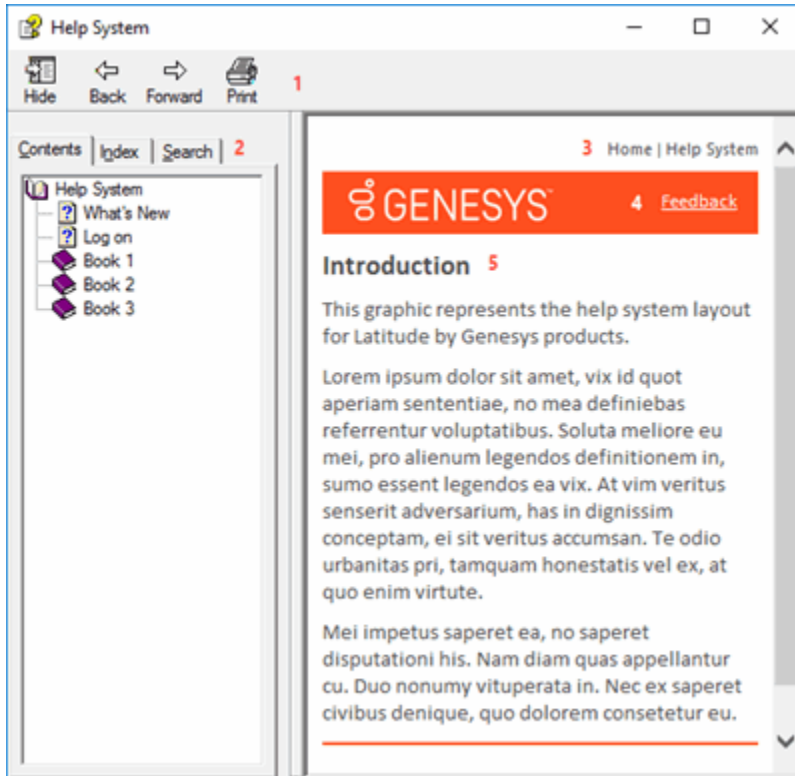
1. **Menu bar:** Displays options for the application.
2. **Grouping bar:** Allows you to drag and drop column headings into the space to group data.
3. **Content pane:** Displays the AIM Receiver clients.
4. **Command bar:** Displays options for adding or displaying information.

Help Overview

AIM Receiver Manager help provides you with information for using AIM Receiver Manager. To locate and view a topic, use the table of contents, index, and search features.

To open help

In menu bar, click **Help** and then click **Help on AIM Receiver Manager**. The **AIM Receiver Manager 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:** Allows you to hide or show the tabs and **Navigation** pane, move forward and backward through topics, and print the currently displayed topic.
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.
 - **Glossary:** If available, displays a list of terms and their definitions. To display a definition, click the term.
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.

Client Configuration

Client Configuration

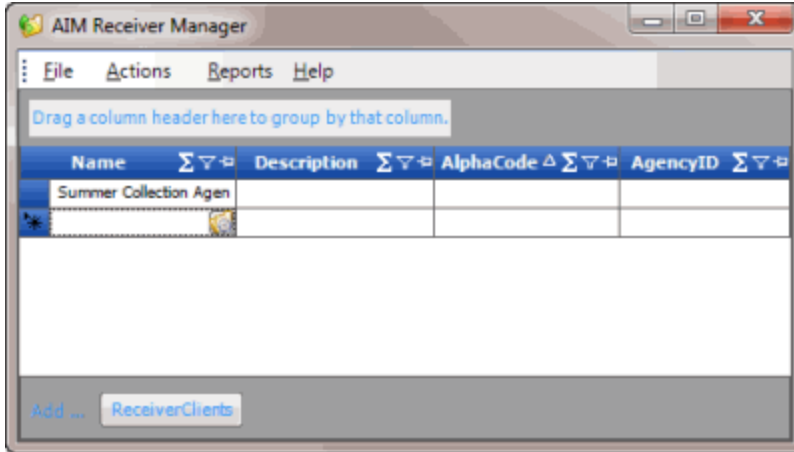
Use the **Client Configuration** window to add clients who outsource accounts to your organization, and configure the client settings. You can also import and export data for a single client. For more information, see [Import Files](#) and [Export Files](#).

Add a Client

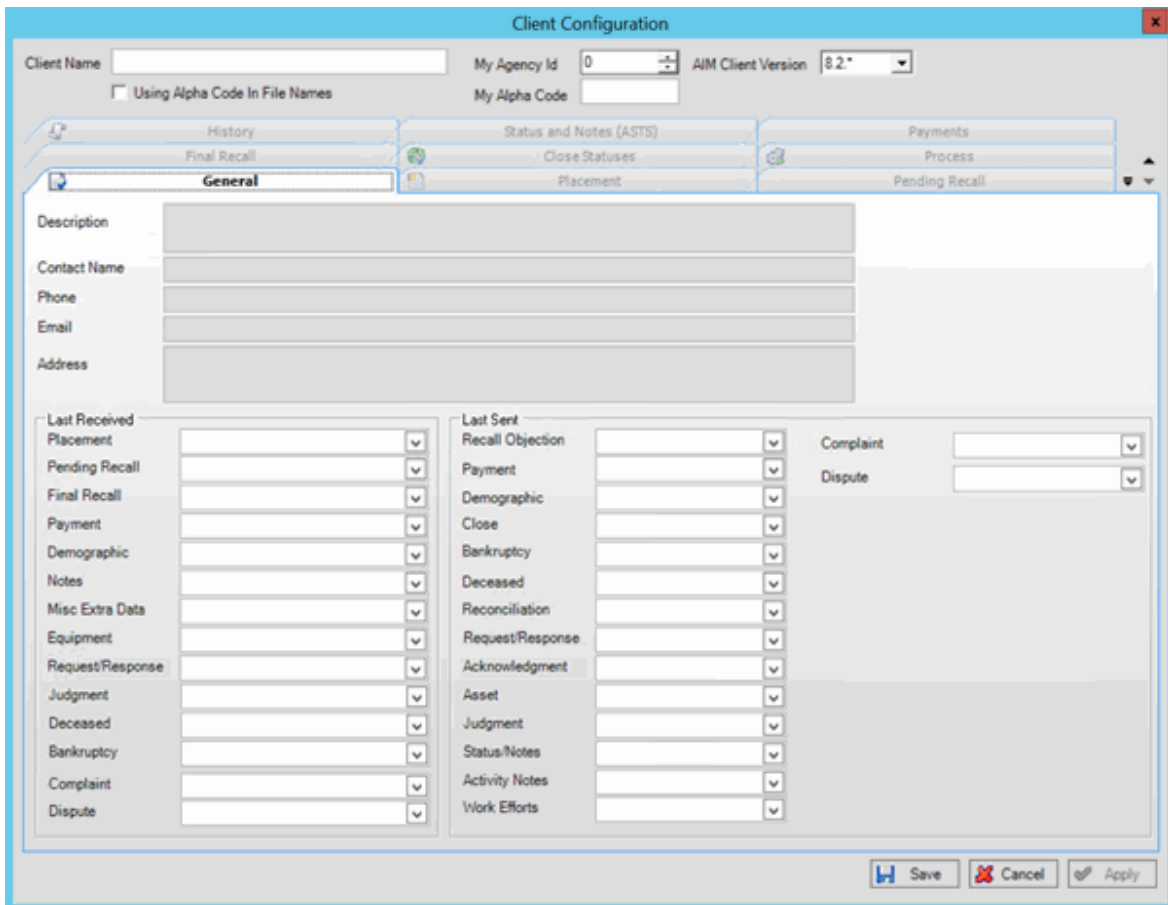
Use the **Client Configuration** window to add a client. Once you add a client, you can configure the client's settings.

To add a client

1. In the lower section of the **AIM Receiver Manager** window, click **ReceiverClients**. AIM Receiver Manager adds a blank row to the data grid.



2. In the Name column of the data grid, click the Client icon. The **Client Configuration** window appears.



Client Name: Name of the client who is outsourcing accounts to your organization.

My Agency ID: Unique numeric code that the client assigned to your organization for identification purposes.

AIM Client Version: The version of AIM that your client uses.

Using Alpha Code in File Names: If selected, AIM Receiver Manager includes the value in **My Alpha Code** when naming the import and export files.

My Alpha Code: Unique alphanumeric code that the client assigned to your organization. The client uses this code to label the folders that contain your import and export files.

3. In the upper section of the window, complete the information and then click **Apply**.
4. Proceed to configure the client.
5. After you configure the client, click **Save**. AIM Receiver Manager adds the client to the data grid in the **AIM Receiver Manager** window.

Configure General Client Settings

Use the **General** tab in the **Client Configuration** window to configure general settings for a client.

To configure general client settings

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

The screenshot displays the 'General' tab of the Client Configuration window. It features a top navigation bar with tabs for 'History', 'Status and Notes (ASTS)', and 'Payments'. The 'General' tab is active, showing a 'Final Recall' button. Below the navigation bar are several input fields: 'Description', 'Contact Name', 'Phone', 'Email', and 'Address'. A large section below contains two columns of dropdown menus. The left column is labeled 'Last Received' and includes dropdowns for Placement, Pending Recall, Final Recall, Payment, Demographic, Notes, Misc Extra Data, Equipment, Request/Response, Judgment, Deceased, Bankruptcy, Complaint, and Dispute. The right column is labeled 'Last Sent' and includes dropdowns for Recall Objection, Payment, Demographic, Close, Bankruptcy, Deceased, Reconciliation, Request/Response, Acknowledgment, Asset, Judgment, Status/Notes, Activity Notes, and Work Efforts. The 'Complaint' and 'Dispute' dropdowns are currently empty.

Description: Description of the client.

Contact Name: Name of the contact person at the client's organization.

Phone: Contact person's phone number.

Email: Contact person's email address.

Address: Contact person's mailing address.

Last Received: This section displays the dates that you last received the type of data from the client. The system populates this information when you import data from a file.

Last Sent: This section displays the dates that you last sent the type of data to the client. The system populates this information when you export data to a file.

2. In the upper section of the tab, complete the information and then click **Apply**.

Configure Account Placements

Use the **Placement** tab in the **Client Configuration** window to configure account placement settings for a client. You can specify which customer and desk to assign to accounts that a client places with your organization.

To configure account placement settings

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
2. Click the **Placement** tab.

The screenshot shows the 'Placement' tab in the Client Configuration window. The window has a title bar with 'Placement' and a close button. Below the title bar, there are three tabs: 'History', 'Status and Notes (ASTS)', and 'Payments'. The 'Placement' tab is active. The main content area has a heading: 'Choose the customer and desk to import accounts into when a placement file is received.' There are three radio buttons: 'From Placement File' (selected), 'Use Predefined Customer', and 'Customer Mapping Logic'. Below the radio buttons is a dropdown menu for 'Use Predefined Customer'. Below that is a table with two columns: 'Client Customer' and 'Agency Customer'. The table is currently empty. Below the table is a button labeled 'Add ...' and a button labeled 'New Customer Mapping'. Below the table is a checkbox labeled 'Use Desk from Placement File' and a dropdown menu for 'Desk'.

Use Desk from Placement File: If selected, the import file contains the desk to assign to accounts.

Desk: Desk to assign to accounts.

3. Do one of the following:
 - If the import file contains the customer to assign to accounts, click **From Placement File**.
 - To specify the customer to assign to accounts, click **Use Predefined Customer** and then, in the list box, click the customer.

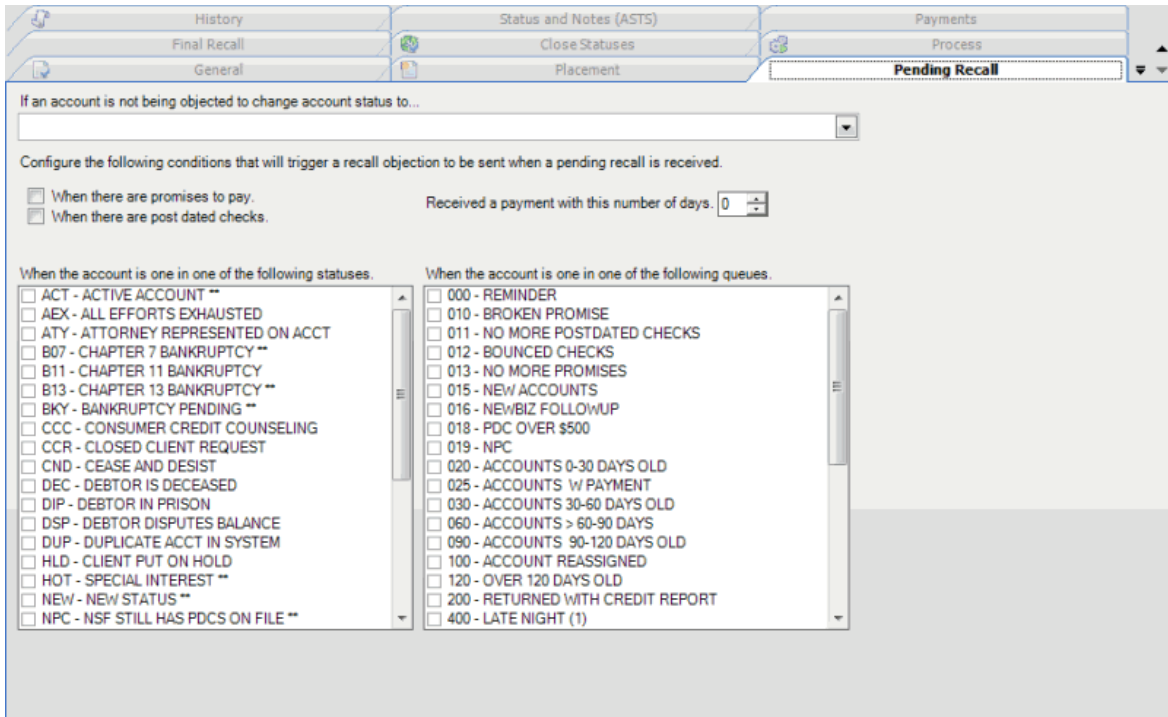
- If the import file contains customer codes that you can map to existing customers, click **Customer Mapping Logic** and then do the following:
 - a. Click **New Customer Mapping**. AIM Receiver Manager adds a blank row to the data grid.
 - b. In the Client Customer column of the data grid, type the code included in the file that identifies the client.
 - c. In the Agency Customer column of the data grid, type the code for the existing customer to map to the client customer code.
- 4. Do one of the following:
 - If the import file contains the desk to assign to accounts, click **Use Desk from Placement File**.
 - If the import file doesn't contain the desk to assign to accounts, in the **Desk** list box, click the desk to assign to accounts.
- 5. Complete the information and then click **Apply**.

Configure Pending Recalls

Use the **Pending Recall** tab in the **Client Configuration** window to configure pending recalls and objections for a client.

To configure pending recalls

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
2. Click the **Pending Recall** tab.



[Account Status]: Status to change an account to when you aren't objecting to an account recall.

When there are promises to pay: If selected, when AIM Receiver Manager receives a pending recall request for an account with a promise-to-pay arrangement, it triggers a recall objection.

When there are post dated checks: If selected, AIM Receiver Manager receives a pending recall request for an account with post-dated check or credit card transactions, it triggers a recall objection.

Received a payment with this number of days: Number of days after AIM Receiver Manager receives a payment that it no longer triggers a recall objection. If AIM Receiver Manager receives a payment before the number of days have passed, it triggers a recall objection.

When the account is in one of the following statuses: If a check box is selected, that account status triggers a recall objection.

When the account is in one of the following queues: If a check box is selected, that work queue triggers a recall objection.

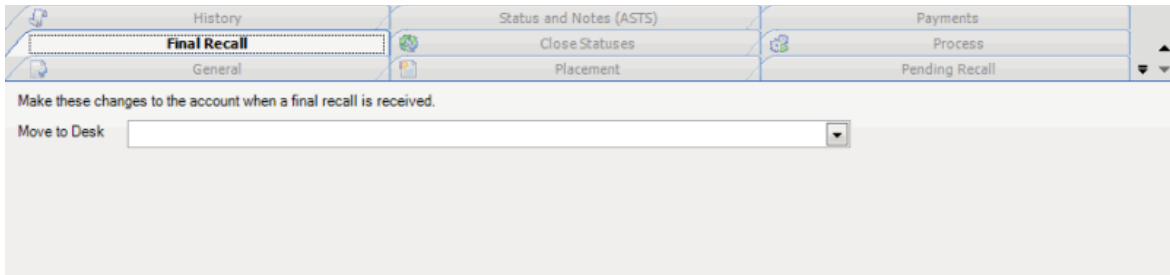
3. Complete the information and then click **Apply**.

Configure Final Recalls

Use the **Final Recall** tab in the **Client Configuration** window to configure final recalls for a client.

To configure final recalls

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
2. Click the **Final Recall** tab.



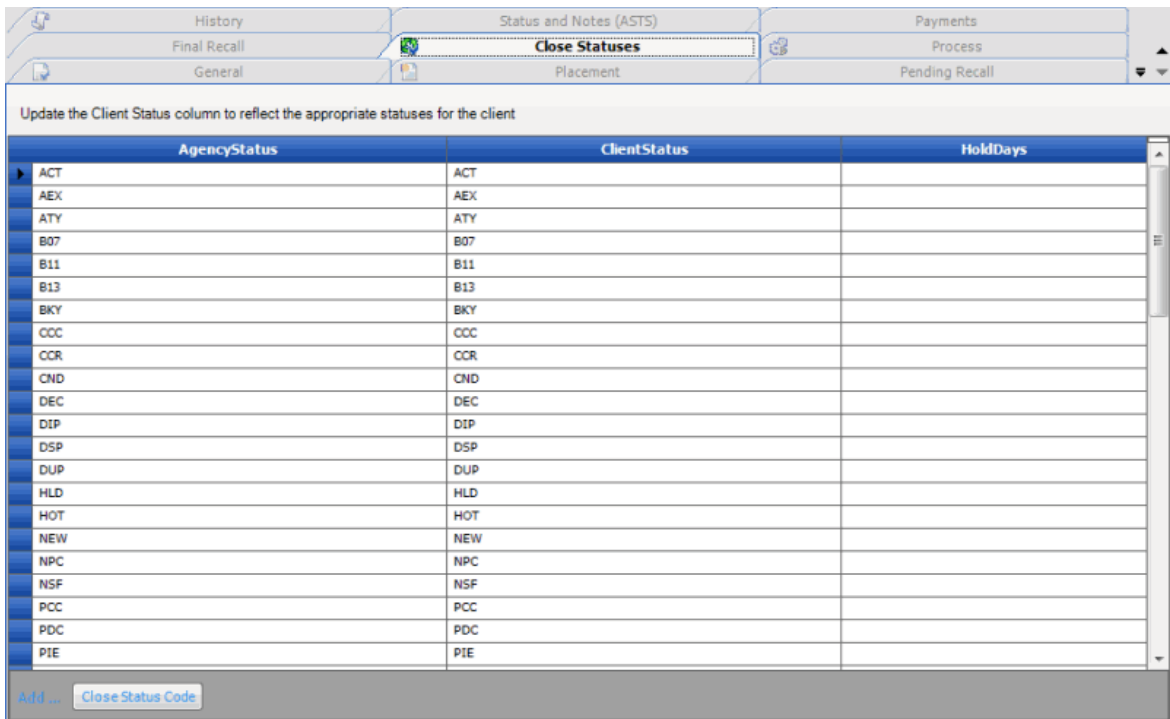
3. In the **Move to Desk** list box, click the desk to move accounts to when AIM Receiver Manager receives a final recall and then click **Apply**.

Configure Close Status Codes

Use the **Close Statuses** tab in the **Client Configuration** window to map close status codes your organization uses to close status codes the client uses.

To configure close status codes

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
2. Click the **Close Statuses** tab.



AgencyStatus: Status codes your organization assigns to accounts.

ClientStatus: Status codes that the client uses that corresponds to your organization's status codes.

HoldDays: Number of days to hold an account assigned to the status before returning the account to the customer. This box allows you to assign different hold days than the ones

configured in Latitude. To use the hold days configured in Latitude, ensure that this box is blank. For more information, see the *Status Codes* topic.

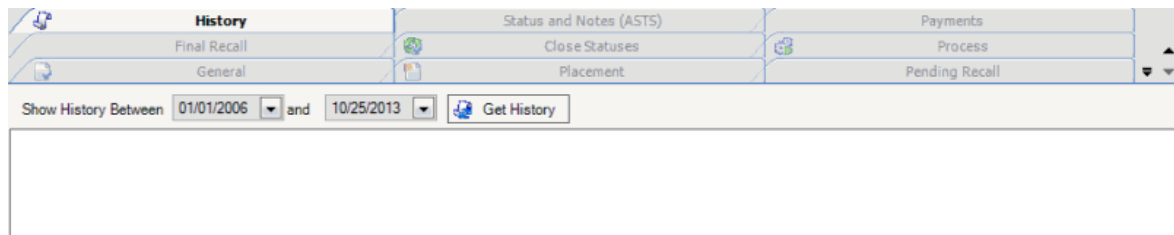
3. To add a close status code, click **Close Status Code**. AIM Receiver Manager adds a blank row to the data grid.
4. Complete the information and then click **Apply**.

View Client History

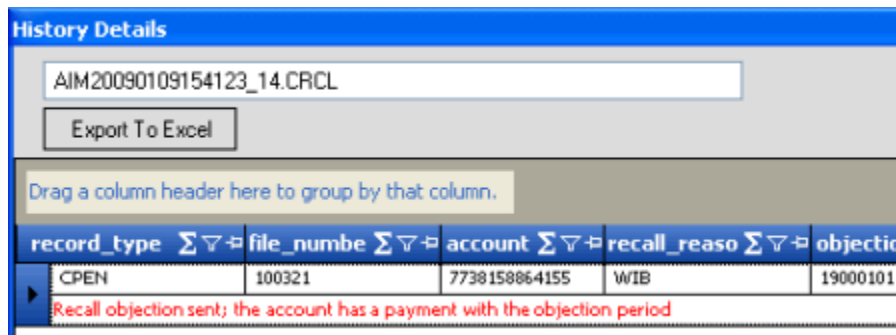
Use the **History** tab in the **Client Configuration** window to view transaction history for a client.

To view client history

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
2. Click the **History** tab.



3. Specify the date range for which to view transaction history and then click **Get History**. Transactions that occurred within the specified time frame appear in the data grid.
4. To view detail for a transaction, in the data grid, click in the File Name box and then click the Detail icon. The **History Details** dialog box appears.



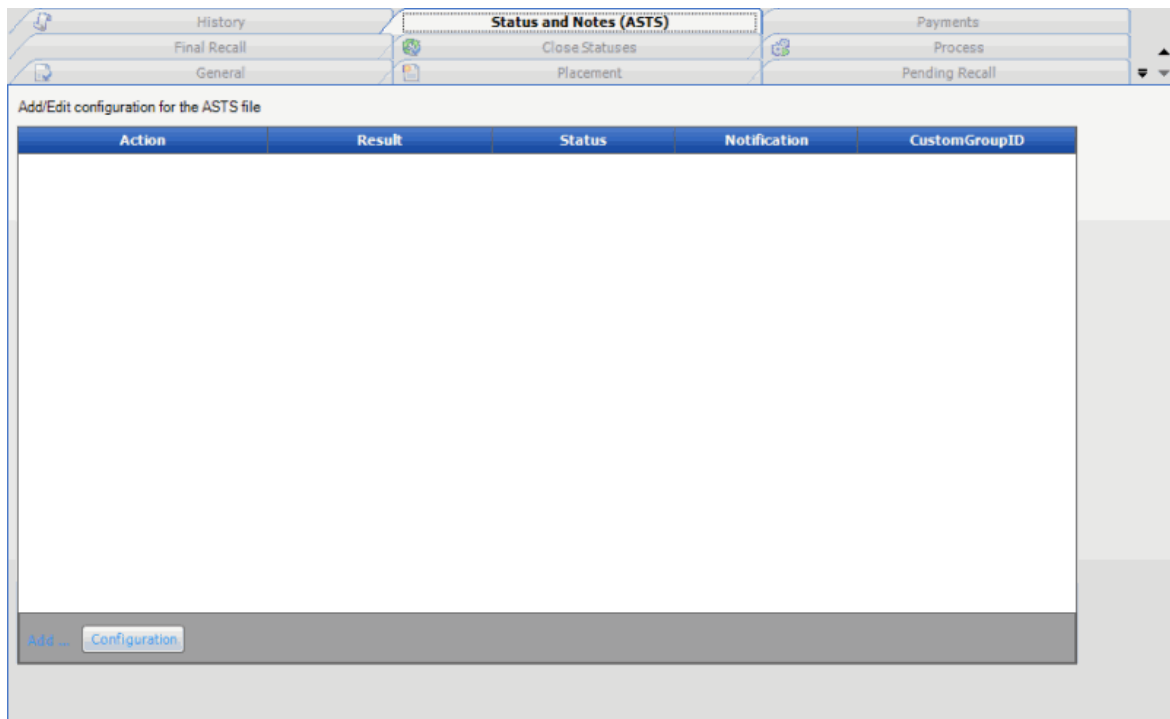
5. To export the data to Microsoft Excel, do the following:
 - a. Click **Export to Excel**. The **Save As** dialog box appears.
 - b. In the **File name** box, type a name for the file and then click **Save**.

Configure Statuses and Notes

Use the **Status and Notes** tab in the **Client Configuration** window to configure action and result codes for account status and note changes.

To configure statuses and notes

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
2. Click the **Status and Notes** tab.



Action: Action code assigned to the account note.

Result: Result code assigned to the account note.

Status: Status code assigned to the account.

Notification: Notification queue assigned to the account.

CustomGroupID: Custom group assigned to the account.

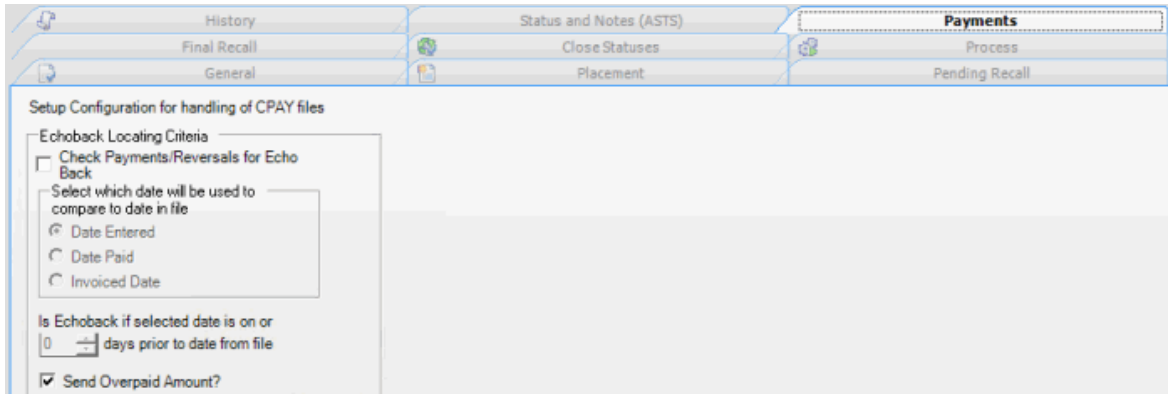
3. To add a status code, click **Configuration**. AIM Receiver Manager adds a blank row to the data grid.
4. Complete the information and then click **Apply**.

Configure Payments

Use the **Payments** tab in the **Client Configuration** window to configure payments for a client. You can configure the system to check payment and adjustment transactions for echo-back to prevent recording duplicate transactions. Echo-back is when you send a payment file to the agency or attorney who holds the account and then receive a payment file that contains that same payment or adjustment.

To configure payments

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
2. Click the **Payments** tab.



3. To check payment and adjustment transactions for echo-back, do the following:
 - a. Select the **Check Payments/Reversals for Echo Back** check box.
 - b. Do one of the following:
 - To compare the date in the payment file to the date you added the payment to the system, click the **Date Entered** check box.
 - To compare the date in the payment file to the payment date, click the **Date Paid** check box.
 - To compare the date in the payment file to the payment invoice date, click the **Invoiced Date** check box.
 - c. Type or select the maximum number of days after the date in the payment file that AIM Receiver Manager considers the transaction an echo-back.
4. To send an overpayment amount, select the **Send Overpaid Amount** check box and then click **Apply**.

Configure Requests and Responses

Use the **Request/Response** tab in the **Client Configuration** window to configure requests and responses for a client.

To configure requests and responses

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
2. Click the **Request/Response** tab.

The screenshot shows the 'Request/Response' configuration window in AIM Receiver Manager. At the top, there are tabs for 'Request/Response', 'History', 'Status and Notes (ASTS)', and 'Payments'. Below these are buttons for 'Final Recall', 'Close Statuses', and 'Process'. The main content area is split into two sections: 'Configure Request Codes' and 'Configure Response Codes'. Each section features a table with three columns: 'Code', 'Description', and 'DefaultText'. Below each table is an 'Add ...' button with a sub-button labeled 'Request Code' or 'Response Code'.

Configure Request Codes

Code: Code that identifies the request.

Description: Description of the request.

DefaultText: Default text to include in the request.

Configure Response Codes

Code: Code that identifies the response.

Description: Description of the response.

DefaultText: Default text to include in the response.

3. To add a request code, click **Request Code**. AIM Receiver Manager adds a blank row to the data grid.
4. To add a response code, click **Response Code**. AIM Receiver Manager adds a blank row to the data grid.
5. Complete the information and then click **Apply**.

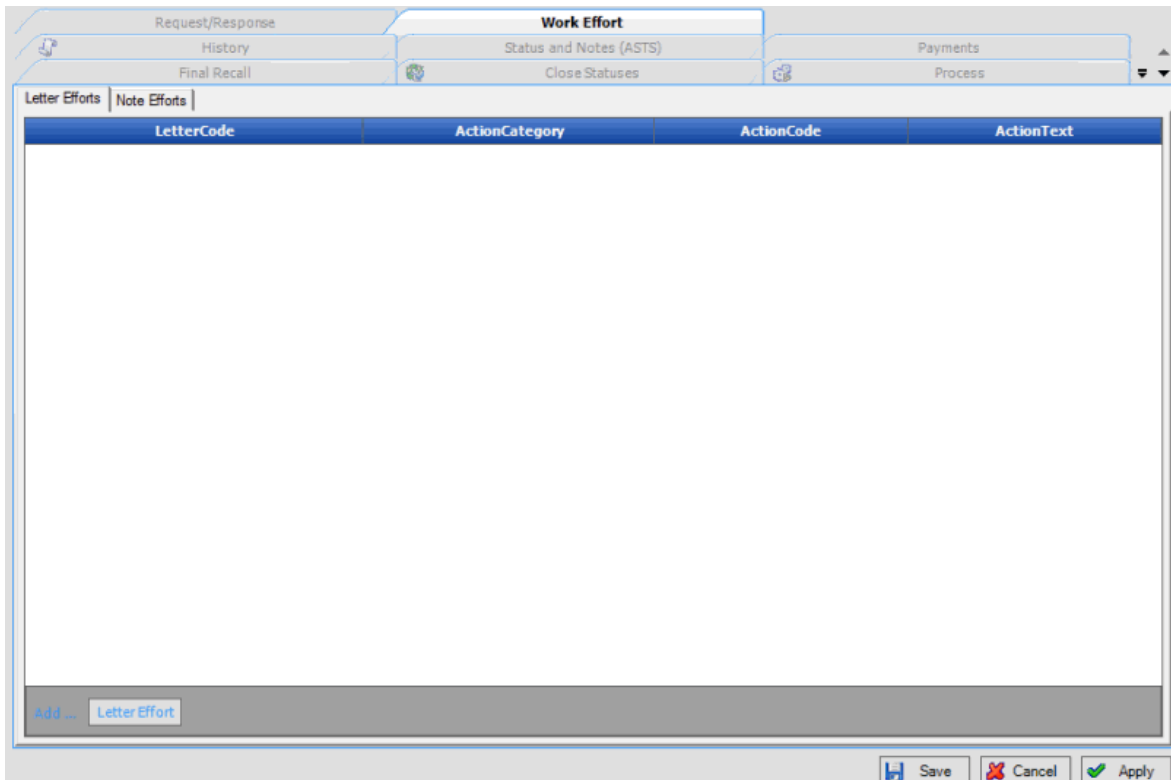
Configure Letter Work Efforts

Use the **Letter Efforts** tab on the **Work Effort** tab in the **Client Configuration** window to configure work efforts related to letters.

To configure letter work efforts

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

2. Click the **Work Effort** tab and then click the **Letter Efforts** tab.



Letter Code: Code that identifies a letter in Letter Console.

Action Category: Category that your organization assigned to group the letter action.

Action Code: Code that your organization assigned to identify the letter action.

Action Text: Comment or description that your organization associated to the letter action.

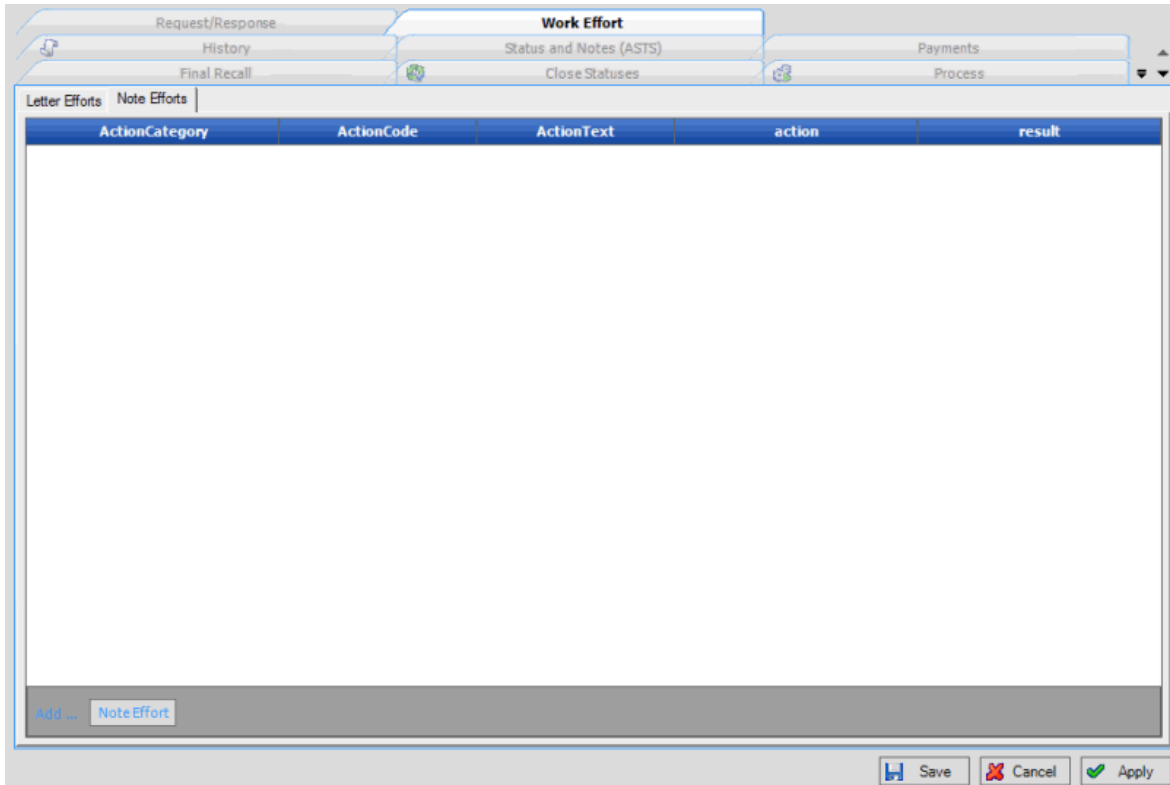
3. To add a letter effort, click **Letter Effort**. AIM Receiver Manager adds a blank row to the data grid.
4. Complete the information and then click **Apply**.

Configure Note Work Efforts

Use the **Note Efforts** tab on the **Work Effort** tab in the **Client Configuration** window to configure work efforts related to notes. You can configure a note work effort using an action and result code together, or just one of the two.

To configure note work efforts

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
2. Click the **Work Effort** tab and then click the **Note Efforts** tab.



Action Category: Category that your organization assigned to group the note action.

Action Code: Code that your organization assigned to identify the note action.

Action Text: Comment or description that your organization associated to the note action.

Action: Unique code that identifies an action in Latitude.

Result: Unique code that identifies the result of an action in Latitude.

3. To add a note effort, click **Note Effort**. AIM Receiver Manager adds a blank row to the data grid.
4. Complete the information and then click **Apply**.

Import Overview

Import Overview

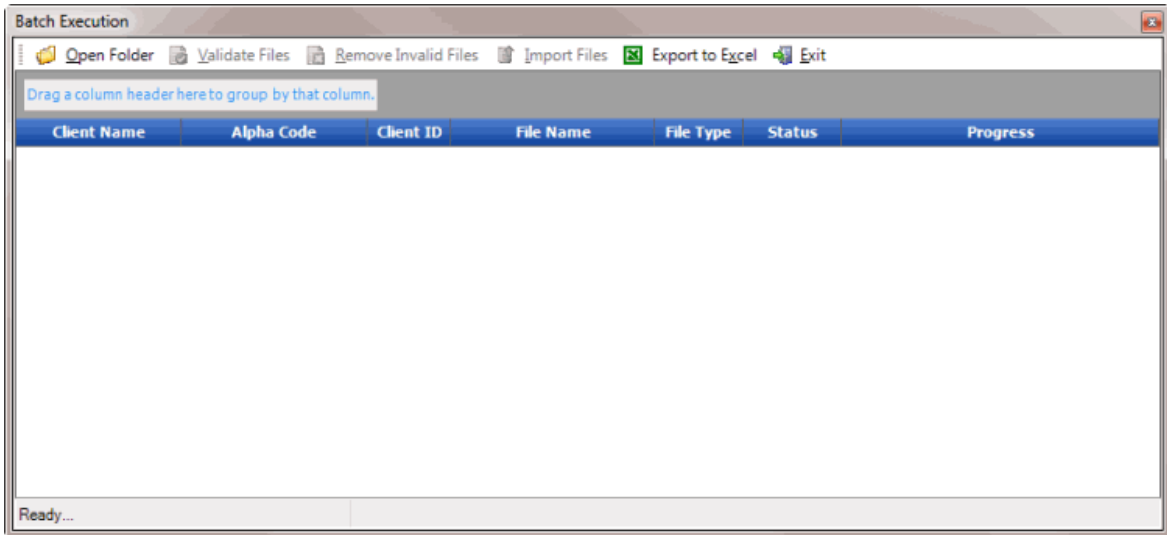
You have two options for importing AIM client data into AIM Receiver. The first option is to import client data from all the files in one or more client folders. The second option is to import client data for a specific client and type of data (for example, payments, recalls, notes).

Import All Files in a Folder

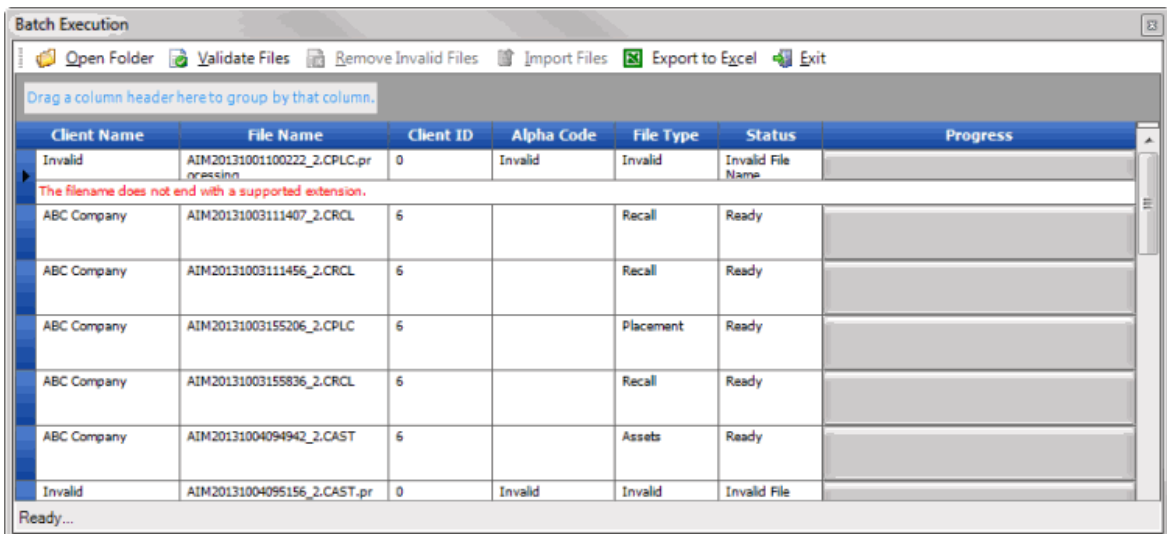
Use the **Batch Execution** window to import AIM client data from all the files in a folder. You can select a folder for a specific client and only import those files, or, you can select a folder at a higher level and import files for multiple clients. AIM Receiver Manager flags for removal invalid files and files that AIM Receiver Manager processed previously.

To import all files in a folder

1. In the menu bar, click **Actions > Import > Import All Files From Folder**. The **Batch Execution** window appears.



2. In the toolbar, click **Open Folder**. The **Browse for Folder** dialog box appears.
3. Click the folder for the import files and then click **OK**. The files appear in the **Batch Execution** window. The Status column indicates whether a file is ready for validation or has errors. If a file has errors, AIM Receiver Manager displays the errors in the window.



4. In the toolbar, click **Validate Files**. The system verifies whether the file structure is valid. If a file is invalid, the **Processed** check box is selected.

Client Name	File Name	Client ID	Alpha Code	File Type	Status	Progress	Record Count	Processed
Invalid	AIM20131001100222_2.C PI_C_processing	0	Invalid	Invalid	Invalid File Name		0	<input type="checkbox"/>
The filename does not end with a supported extension.								
ABC Company	AIM20131003111407_2.C RCI	6		Recall	Invalid		0	<input type="checkbox"/>
File is an invalid XML file.								
ABC Company	AIM20131003111456_2.C RCI	6		Recall	Invalid		0	<input type="checkbox"/>
File is an invalid XML file.								
ABC Company	AIM20131003155206_2.C PI_C	6		Placement	Invalid		0	<input type="checkbox"/>
File is an invalid XML file.								
ABC Company	AIM20131003155836_2.C RCI	6		Recall	Invalid		0	<input type="checkbox"/>
File is an invalid XML file.								
ABC Company	AIM20131004094942_2.C AST	6		Assets	Invalid		0	<input type="checkbox"/>
File is an invalid XML file.								
Invalid	AIM20131004095156_2.C	0	Invalid	Invalid	Invalid File		0	<input type="checkbox"/>

- In the toolbar, click **Remove Invalid Files**. AIM Receiver Manager deletes invalid files from the data grid, and only displays the valid files. If AIM Receiver Manager imported a file previously, the **Processed** check box is selected.
- To delete files that AIM Receiver Manager processed previously to prevent duplicate processing, click the file and then press the **Delete** key. In the confirmation dialog box, click **Yes**. AIM Receiver Manager deletes the file.
- In the toolbar, click **Import Files**. A progress bar shows that status of the import process.
- When the import is complete, in the toolbar, click **Exit**.
- To review any processing errors, do the steps to [View Client History](#).
- To view batch numbers for imported payments, open the **Payment Entry** window in Latitude. AIM Receiver Manager notes the exceptions for payment reversals without a matching payment.

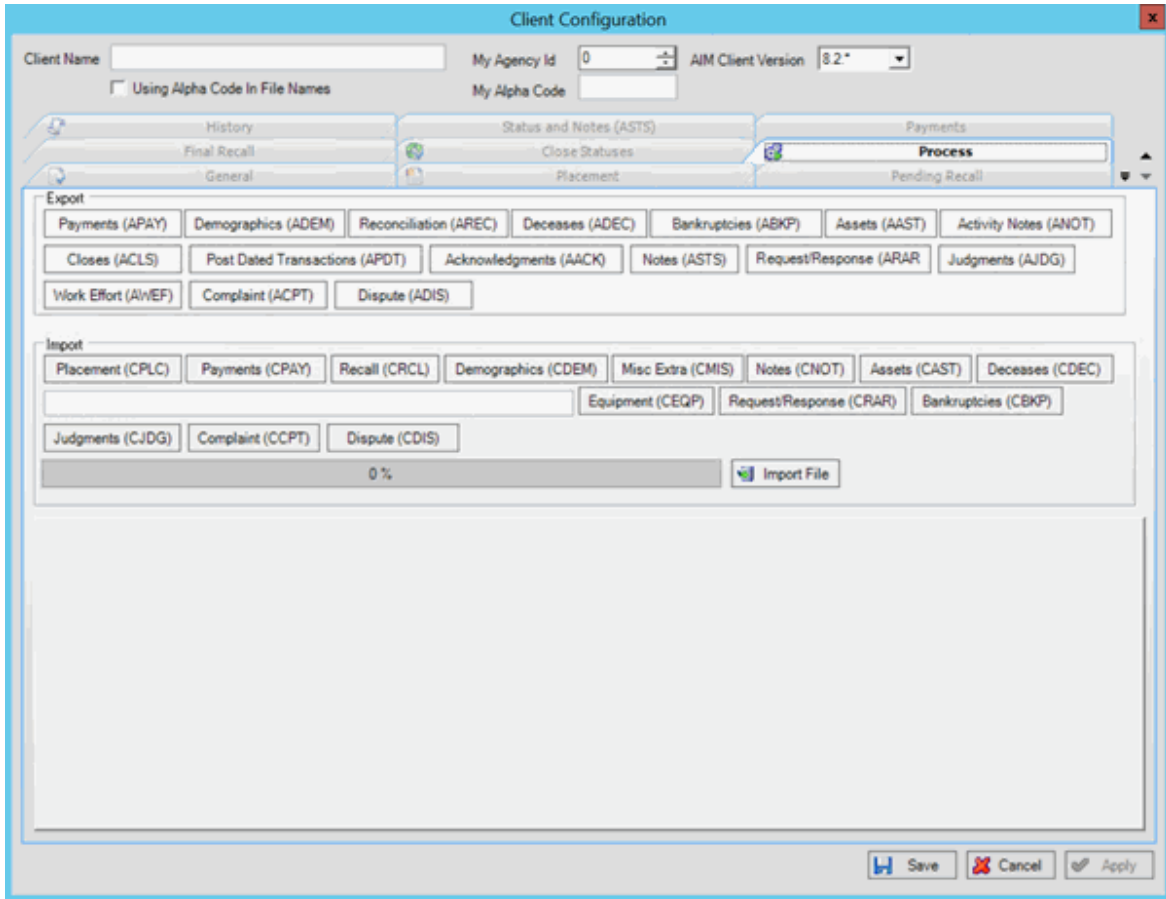
Import Assets

Use the **Process** tab in the **Client Configuration** window to import debtor assets that the client added or updated after placing the accounts with your organization.

To import assets

- In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

2. Click the **Process** tab.



3. In the **Import** section, click **Assets (CAST)**. The **Open** dialog box appears.
4. Click the Assets file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
5. Click **OK**. Data from the file appears in the preview window.
6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
7. Click **OK**.
8. To review any processing errors, click the **History** tab.

Import Account Notes

Use the **Process** tab in the **Client Configuration** window to import notes that the client added or updated after placing the accounts with your organization. The import file only includes user notes, not system notes.

To import account notes

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

Client Configuration

Client Name My Agency Id AIM Client Version Using Alpha Code In File Names My Alpha Code

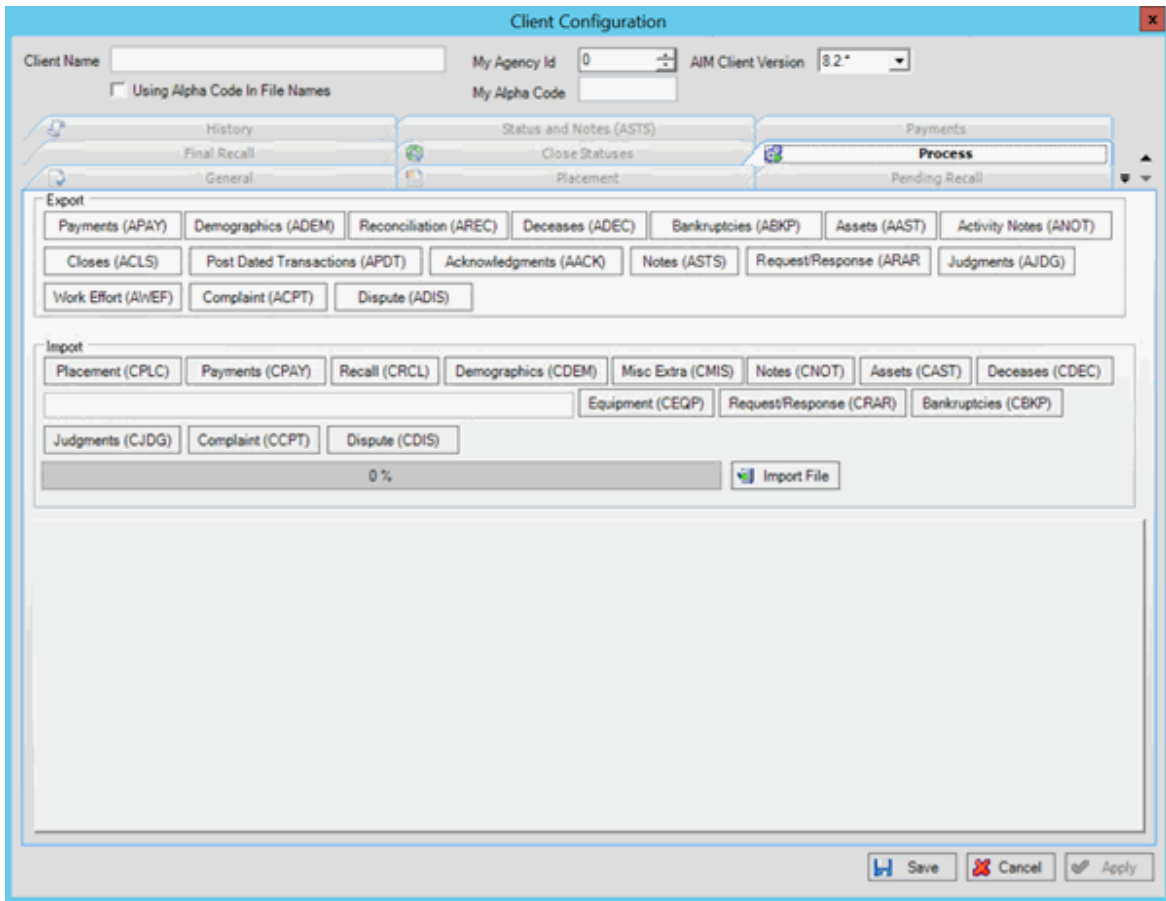
History: Final Recall, **General**
Status and Notes (ASTS): Close Statuses, Placement
Payments: Process, Pending Recall

Description: ABC Agency
Contact Name:
Phone: 555-555-5555
Email: aadams@abcagency.com
Address: 1000 Main St, Jacksonville, FL 32256

Last Received: Placement, Pending Recall, Final Recall, Payment, Demographic, Notes, Misc Extra Data, Equipment, Request/Response, Judgment, Deceased, Bankruptcy, Complaint, Dispute
Last Sent: Recall Objection, Payment, Demographic, Close, Bankruptcy, Deceased, Reconciliation, Request/Response, Acknowledgment, Asset, Judgment, Status/Notes, Activity Notes, Work Efforts
Complaint:
Dispute:

Save Cancel Apply

2. Click the **Process** tab.



3. In the **Import** section, click **Notes (CNOT)**. The **Open** dialog box appears.
4. Click the Notes file to import and then, in the **Import** section, click **Open**. A notification dialog box appears, which shows the number of records in the file.
5. Click **OK**. Data from the file appears in the preview window.
6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
7. Click **OK**.
8. To review any processing errors, click the **History** tab.

Import Account Placements

Use the **Process** tab in the **Client Configuration** window to import accounts the client is placing with your organization.

To import account placements

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

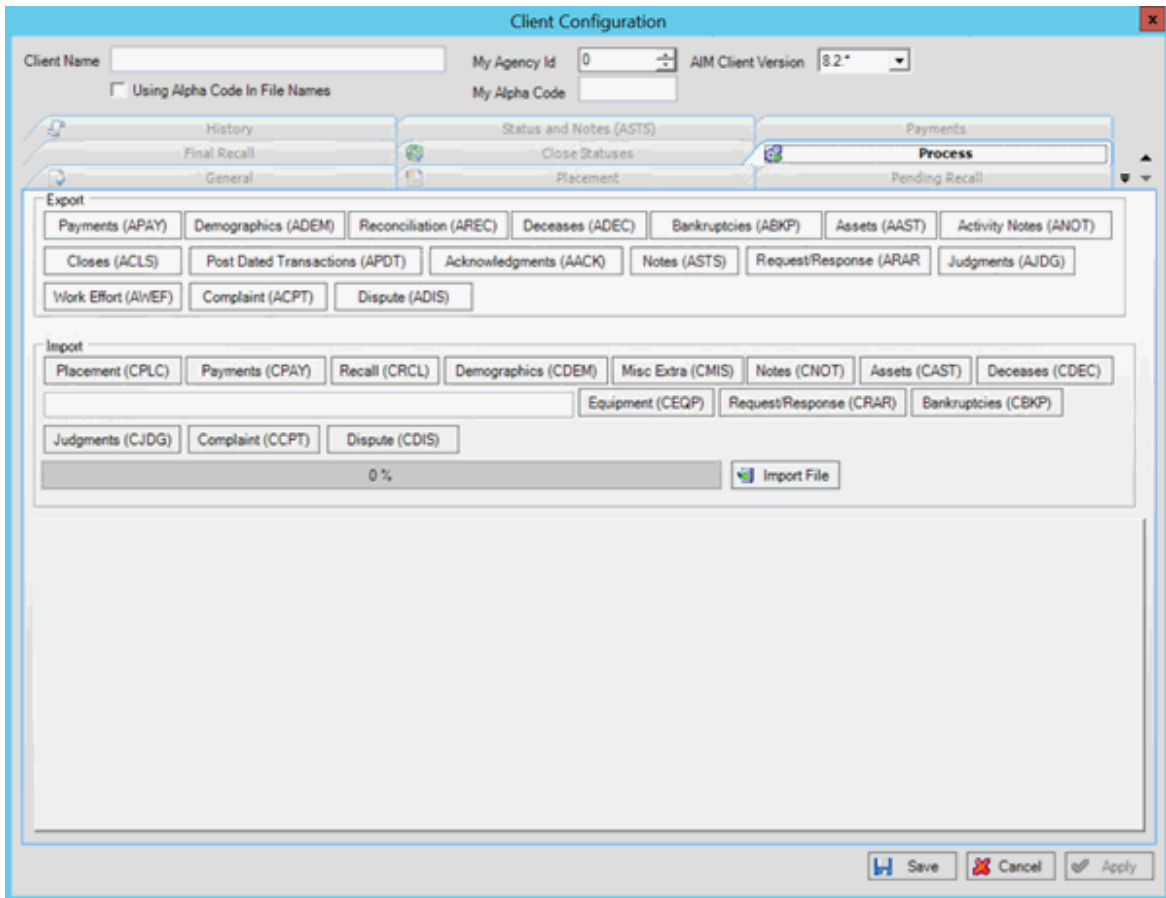
2. Click the **Placement** tab.

Client Customer	Agency Customer
Default Customer	ABC Agency

At the bottom of the table area is a button: 'Add ... New Customer Mapping'. Below the table are two more options: 'Use Desk from Placement File' (checkbox) and 'Desk' (dropdown menu showing 'COLLECTOR DESK').

3. Verify that you selected the correct customer and desk to which to move the accounts before importing the placement data.

- Click the **Process** tab.



- In the **Import** section, click **Placement (CPLC)**. The **Open** dialog box appears.
- Click the Placement file to import and then click **Open**. A notification dialog box appears, which shows the number of records and total account balance in the file.
- Click **OK**. Data from the file appears in the preview window.
- To review debtor information, click the plus sign (+) next to a file number. An account can have multiple debtors associated to it.
- After reviewing the data, click **Import File**. When the import process is complete, a notification dialog box appears.
- Click **OK**.
- To review any processing errors, click the **History** tab.

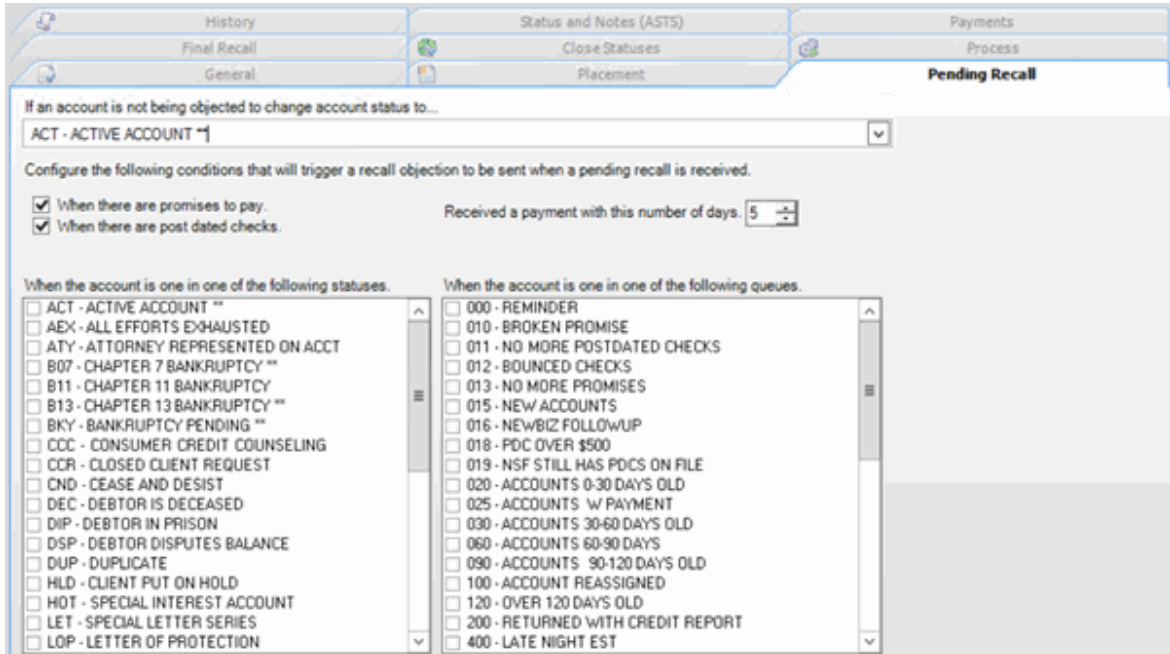
Import Account Recalls

Use the **Process** tab in the **Client Configuration** window to import pending and final recalls received from the client for accounts that the client placed with your organization. For pending recalls, AIM Receiver Manager creates an objection file automatically for accounts that match the criteria specified on the **Pending Recall** tab. For final recalls, AIM Receiver Manager closes and returns accounts to the

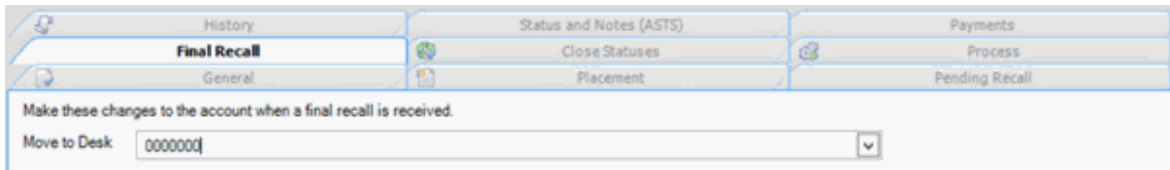
client with a queue level of "999" and a status of "RCL." Also, AIM Receiver Manager moves accounts to the desk specified on the **Final Recall** tab.

To import account recalls

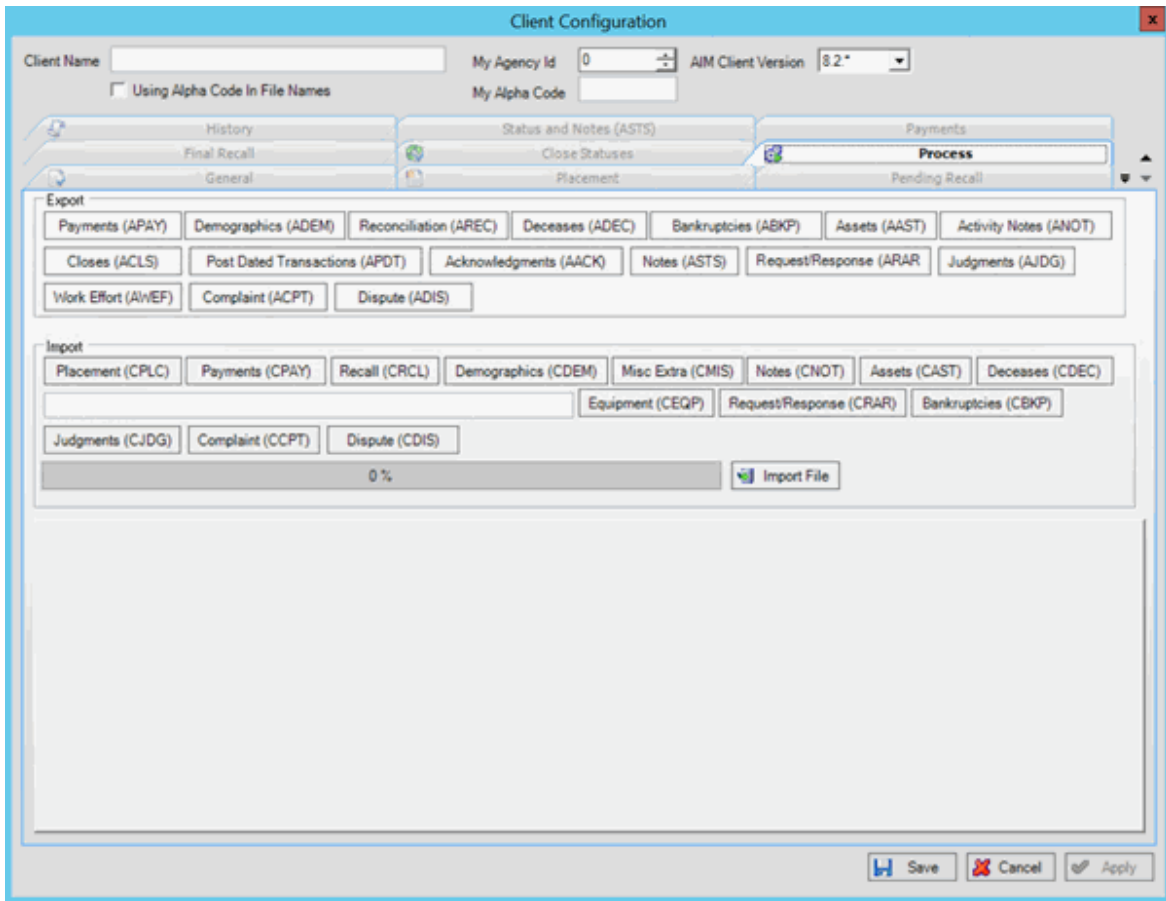
1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
2. Click the **Pending Recall** tab.



3. Verify that the configuration is correct.
4. Click the **Final Recall** tab.



5. Verify that the configuration is correct.
6. Click the **Process** tab.



7. In the **Import** section, click **Recall (CRCL)**. The **Open** dialog box appears.
8. Click the Recall file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
9. Click **OK**. Data from the file appears in the preview window.
10. Review the data and then click **Import File**.
11. If the import file contains pending recalls, AIM Receiver Manager creates an objection file and displays a dialog box. In the dialog box, click the folder to save the file to and then click **Save**.
12. In the notification dialog box, click **OK**.
13. To review any processing errors, click the **History** tab.

Import Bankruptcy Data

Use the **Process** tab in the **Client Configuration** window to import bankruptcy data that the client added or updated after placing the accounts with your organization.

To import bankruptcy data

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

Client Configuration

Client Name My Agency Id AIM Client Version 8.2.*

Using Alpha Code In File Names My Alpha Code

History Status and Notes (ASTS) Payments

Final Recall Close Statuses Process

General Placement Pending Recall

Description ABC Agency

Contact Name

Phone 555-555-5555

Email aadams@abcagency.com

Address 1000 Main St, Jacksonville, FL 32256

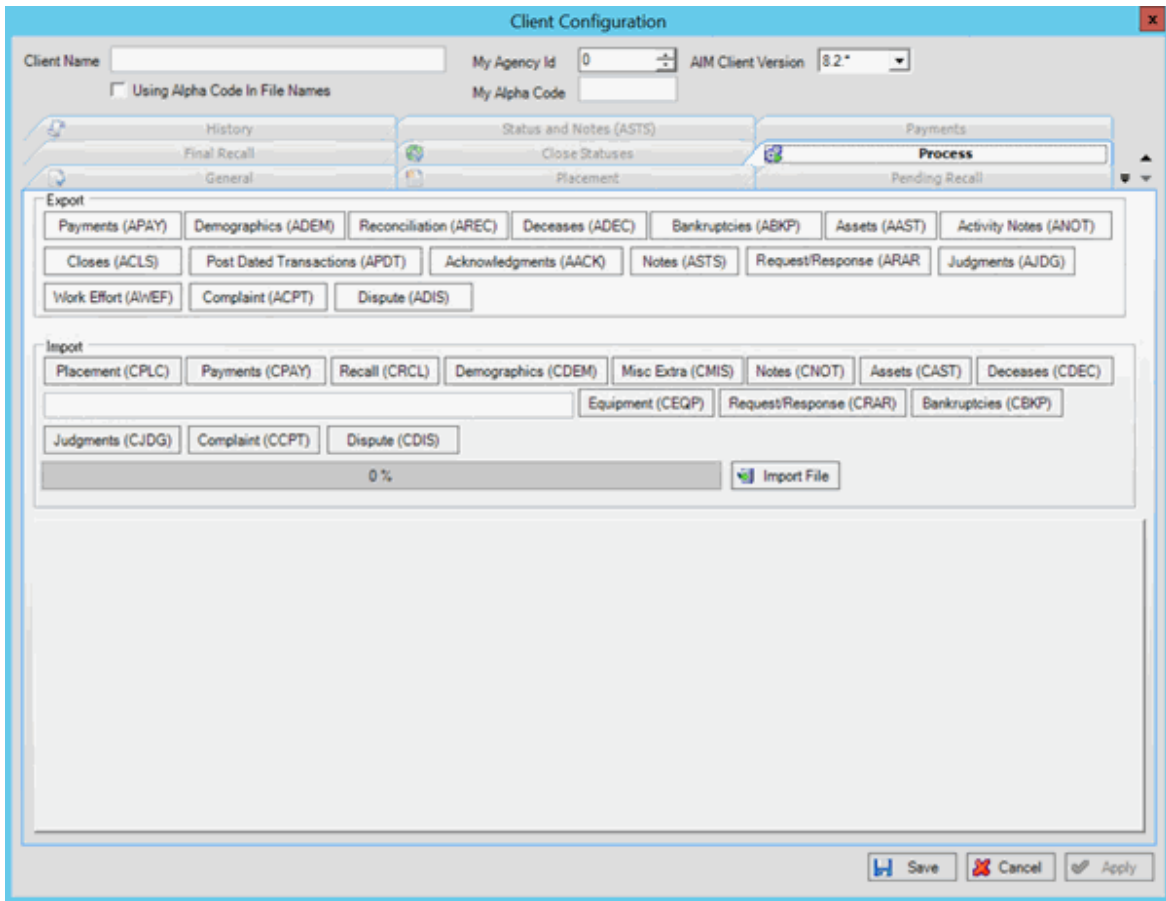
Last Received Placement Pending Recall Final Recall Payment Demographic Notes Misc Extra Data Equipment Request/Response Judgment Deceased Bankruptcy Complaint Dispute

Last Sent Recall Objection Payment Demographic Close Bankruptcy Deceased Reconciliation Request/Response Acknowledgment Asset Judgment Status/Notes Activity Notes Work Efforts

Complaint Dispute

Save Cancel Apply

2. Click the **Process** tab.



3. In the **Import** section, click **Bankruptcies (CBKP)**. The **Open** dialog box appears.
4. Click the Bankruptcy file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
5. Click **OK**. Data from the file appears in the preview window.
6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
7. Click **OK**.
8. To review any processing errors, click the **History** tab.

Import Deceased Debtor Data

Use the **Process** tab in the **Client Configuration** window to import deceased debtor data that the client added or updated after placing the accounts with your organization.

To import deceased debtor data

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

Client Configuration

Client Name My Agency Id AIM Client Version 8.2.*

Using Alpha Code In File Names My Alpha Code

History Status and Notes (ASTS) Payments

Final Recall Close Statuses Process

General Placement Pending Recall

Description ABC Agency

Contact Name

Phone 555-555-5555

Email aadams@abcagency.com

Address 1000 Main St, Jacksonville, FL 32256

Last Received Placement Pending Recall Final Recall Payment Demographic Notes Misc Extra Data Equipment Request/Response Judgment Deceased Bankruptcy Complaint Dispute

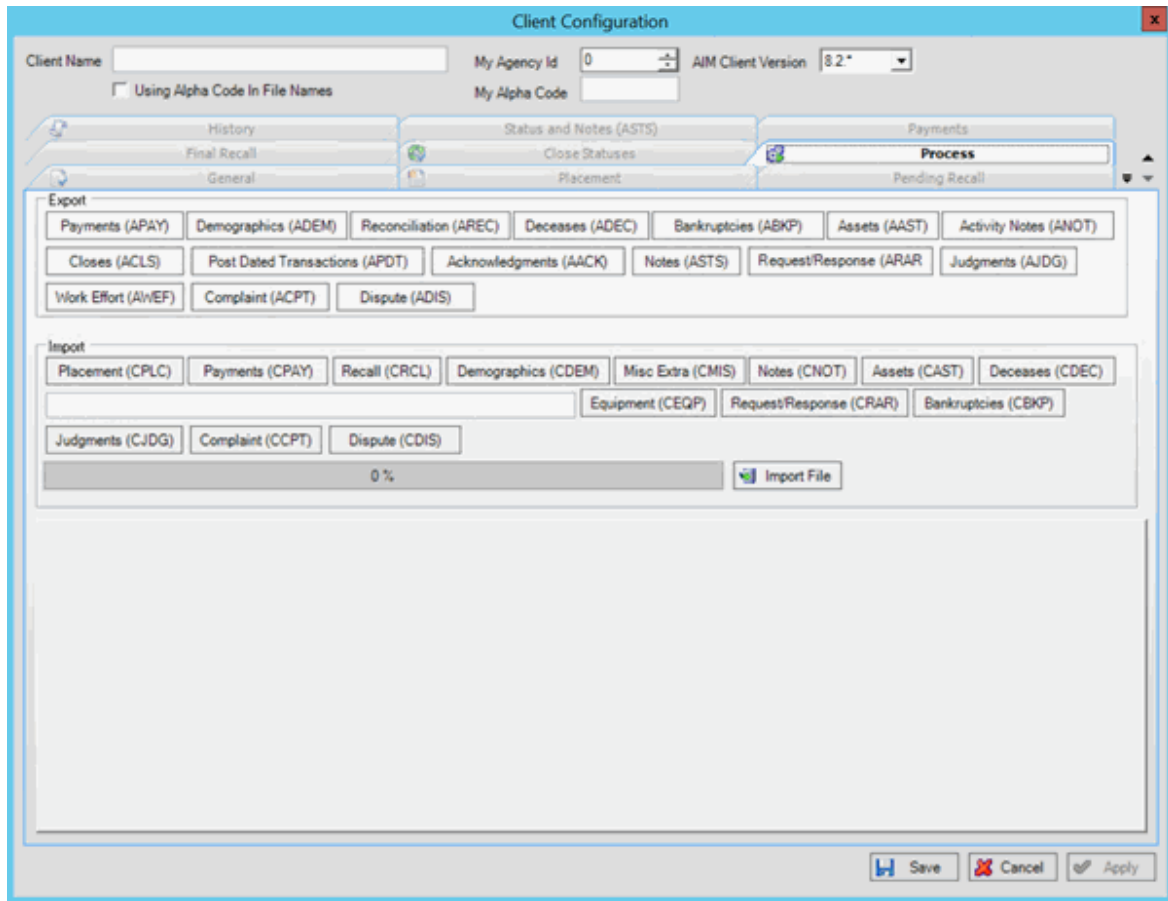
Last Sent Recall Objection Payment Demographic Close Bankruptcy Deceased Reconciliation Request/Response Acknowledgment Asset Judgment Status/Notes Activity Notes Work Efforts

Complaint

Dispute

Save Cancel Apply

2. Click the **Process** tab.



3. In the **Import** section, click **Deceases (CDEC)**. The **Open** dialog box appears.
4. Click the Deceased file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
5. Click **OK**. Data from the file appears in the preview window.
6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
7. Click **OK**.
8. To review any processing errors, click the **History** tab.

Import Demographic Data

Use the **Process** tab in the **Client Configuration** window to import demographic data (phones and addresses) that the client added or updated after placing the accounts with your organization.

To import demographic data

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

Client Configuration

Client Name My Agency Id AIM Client Version 8.2.*

Using Alpha Code In File Names My Alpha Code

History: Final Recall, **General**, Placement

Status and Notes (ASTS): Close Statuses, Pending Recall

Payments: Process

Description: ABC Agency

Contact Name:

Phone: 555-555-5555

Email: aadams@abcagency.com

Address: 1000 Main St, Jacksonville, FL 32256

Last Received: Placement, Pending Recall, Final Recall, Payment, Demographic, Notes, Misc Extra Data, Equipment, Request/Response, Judgment, Deceased, Bankruptcy, Complaint, Dispute

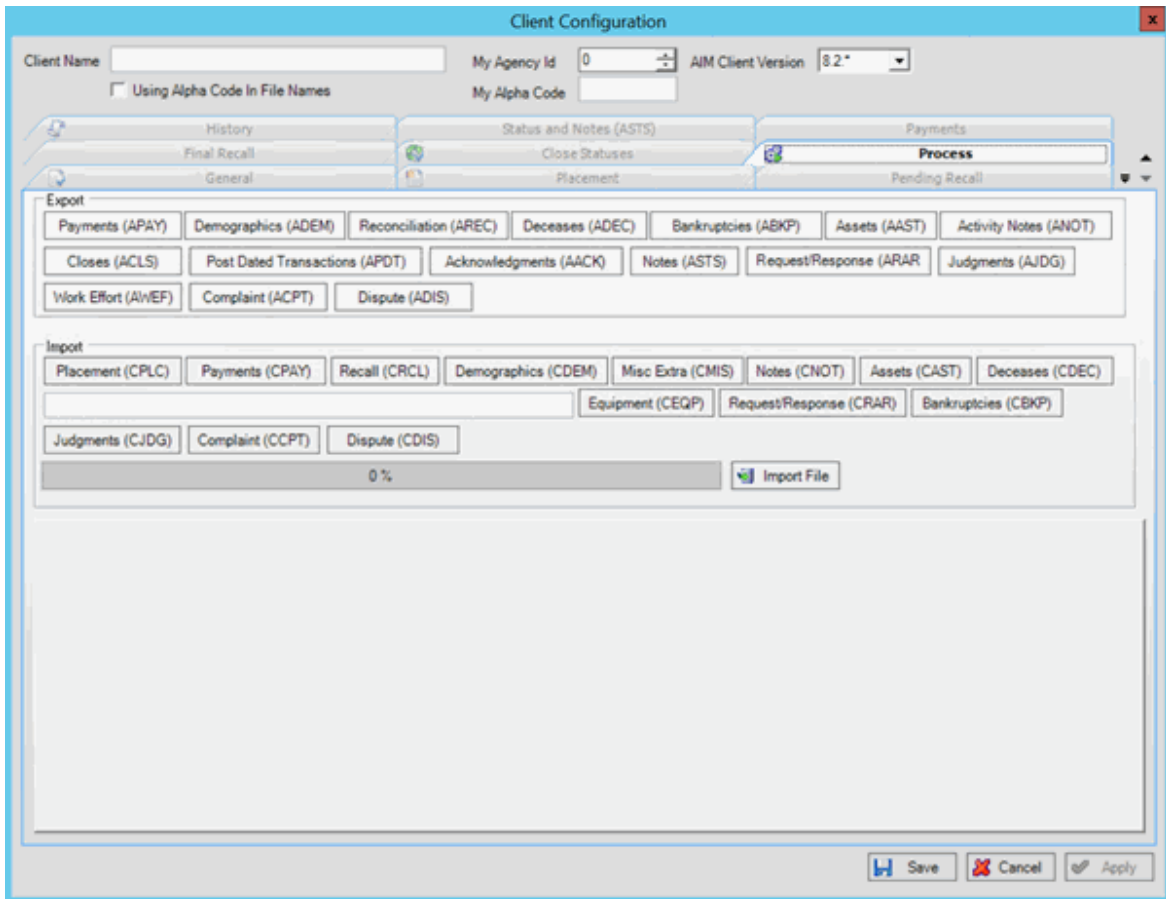
Last Sent: Recall Objection, Payment, Demographic, Close, Bankruptcy, Deceased, Reconciliation, Request/Response, Acknowledgment, Asset, Judgment, Status/Notes, Activity Notes, Work Efforts

Complaint:

Dispute:

Save Cancel Apply

2. Click the **Process** tab.



3. In the **Import** section, click **Demographics (CDEM)**. The **Open** dialog box appears.
4. Click the Demographic file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
5. Click **OK**. Data from the file appears in the preview window.
6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
7. Click **OK**.
8. To review any processing errors, click the **History** tab.

Import Equipment

Use the **Process** tab in the **Client Configuration** window to import equipment that the client added or updated after placing the accounts with your organization.

To import equipment

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

Client Configuration

Client Name My Agency Id AIM Client Version

Using Alpha Code In File Names My Alpha Code

History Status and Notes (ASTS) Payments
Final Recall Close Statuses Process
General Placement Pending Recall

Description

Contact Name

Phone

Email

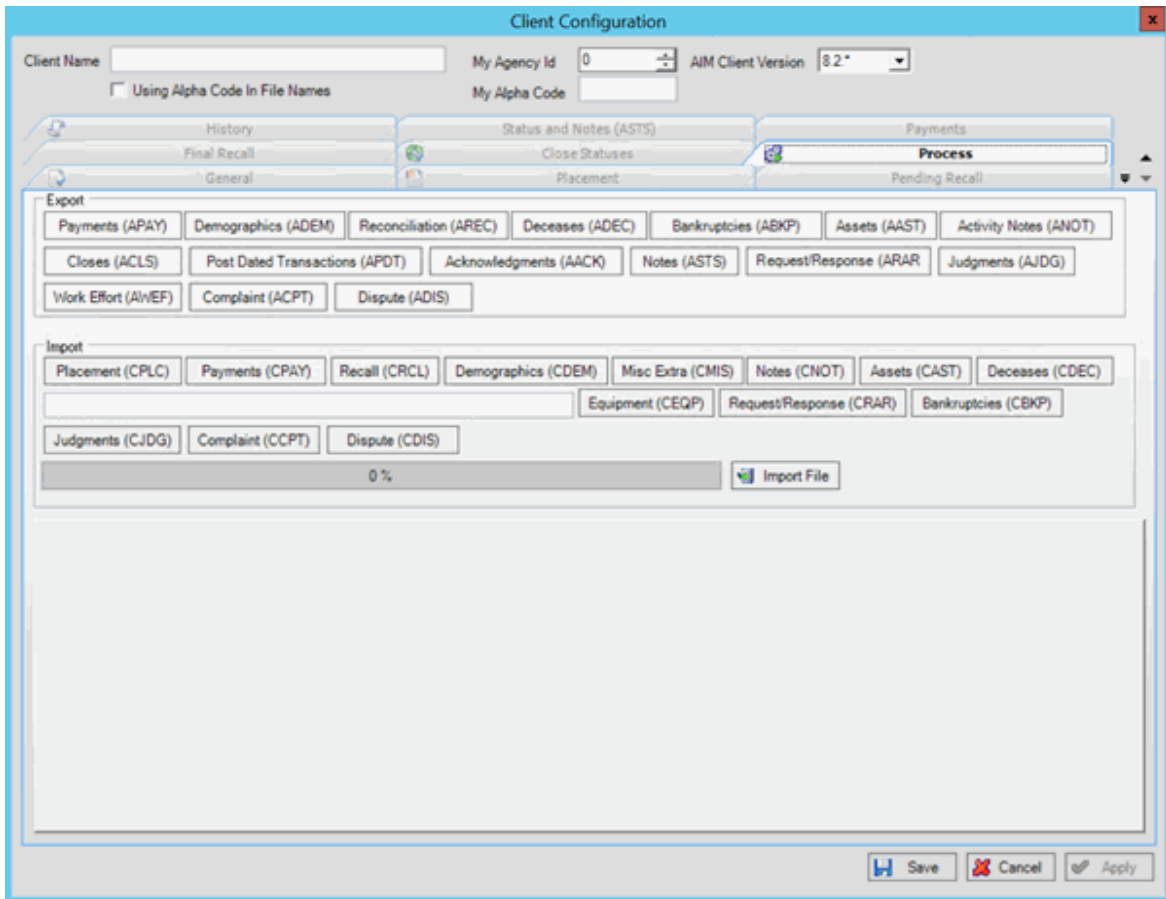
Address

Last Received
Placement
Pending Recall
Final Recall
Payment
Demographic
Notes
Misc Extra Data
Equipment
Request/Response
Judgment
Deceased
Bankruptcy
Complaint
Dispute

Last Sent
Recall Objection
Payment
Demographic
Close
Bankruptcy
Deceased
Reconciliation
Request/Response
Acknowledgment
Asset
Judgment
Status/Notes
Activity Notes
Work Efforts

Complaint
Dispute

2. Click the **Process** tab.



3. In the **Import** section, click **Equipment (CEQP)**. The **Open** dialog box appears.
4. Click the Equipment file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
5. Click **OK**. Data from the file appears in the preview window.
6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
7. Click **OK**.
8. To review any processing errors, click the **History** tab.

Import Judgment Data

Use the **Process** tab in the **Client Configuration** window to import judgment data that the client added or updated after placing the accounts with your organization.

To import judgment data

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

Client Configuration

Client Name My Agency Id AIM Client Version

Using Alpha Code In File Names My Alpha Code

History Status and Notes (ASTS) Payments

Final Recall Close Statuses Process

General Placement Pending Recall

Description

Contact Name

Phone

Email

Address

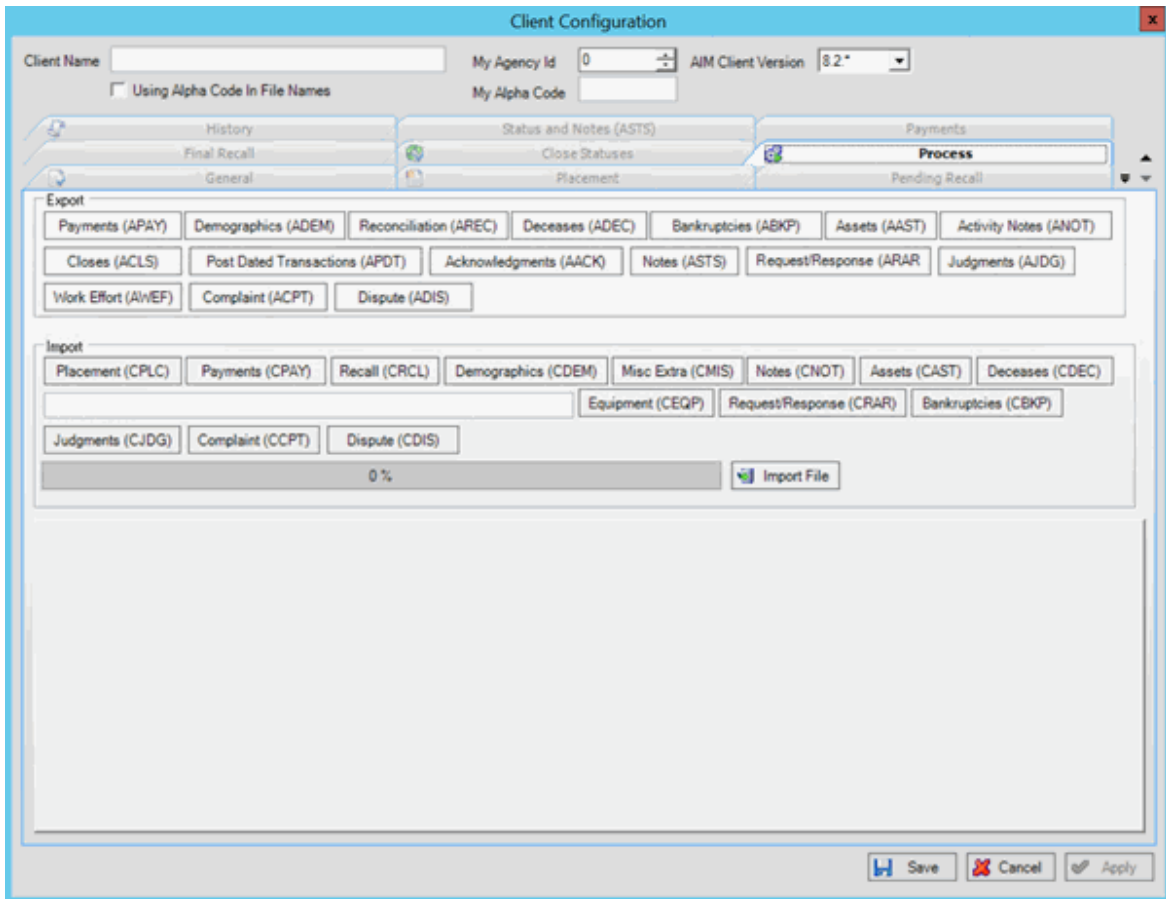
Last Received Placement Pending Recall Final Recall Payment Demographic Notes Misc Extra Data Equipment Request/Response Judgment Deceased Bankruptcy Complaint Dispute

Last Sent Recall Objection Payment Demographic Close Bankruptcy Deceased Reconciliation Request/Response Acknowledgment Asset Judgment Status/Notes Activity Notes Work Efforts

Complaint

Dispute

2. Click the **Process** tab.



3. In the **Import** section, click **Judgments (CJDG)**. The **Open** dialog box appears.
4. Click the Judgment file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
5. Click **OK**. Data from the file appears in the preview window.
6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
7. Click **OK**.
8. To review any processing errors, click the **History** tab.

Import Miscellaneous Extra Data

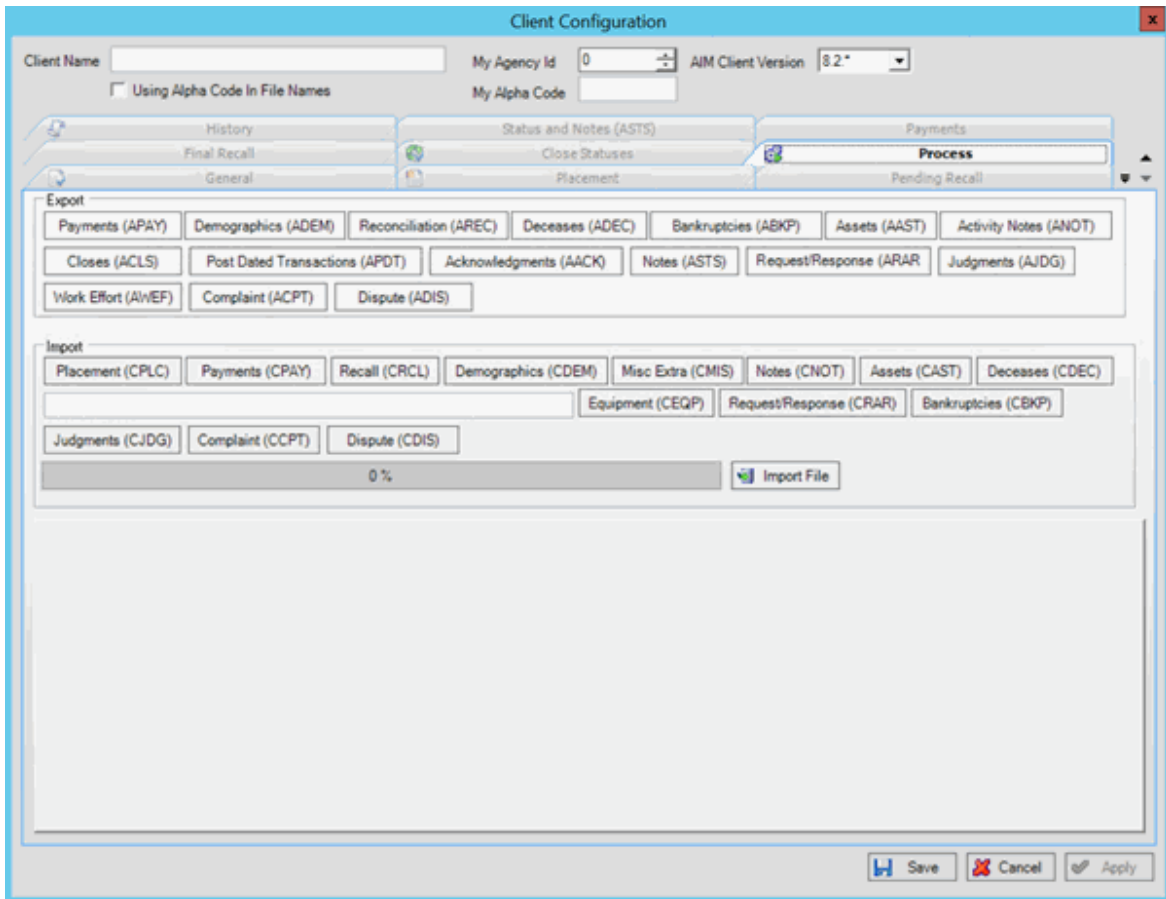
Use the **Process** tab in the **Client Configuration** window to import miscellaneous extra data that the client added or updated after placing the accounts with your organization.

To import miscellaneous extra data

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

AIM Receiver Manager Printable Help

2. Click the **Process** tab.



3. In the **Import** section, click **Misc Extra (CMIS)**. The **Open** dialog box appears.
4. Click the Miscellaneous Extra Data file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
5. Click **OK**. Data from the file appears in the preview window.
6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
7. Click **OK**.
8. To review any processing errors, click the **History** tab.

Import Payments

Use the **Process** tab in the **Client Configuration** window to import payments that the client added or updated after placing the accounts with your organization.

To import payments

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

Client Configuration

Client Name My Agency Id My Alpha Code AIM Client Version

Using Alpha Code In File Names

History Status and Notes (ASTS) Payments

Final Recall Close Statuses Process

General Placement Pending Recall

Description ABC Agency

Contact Name

Phone 555-555-5555

Email aadams@abcagency.com

Address 1000 Main St, Jacksonville, FL 32256

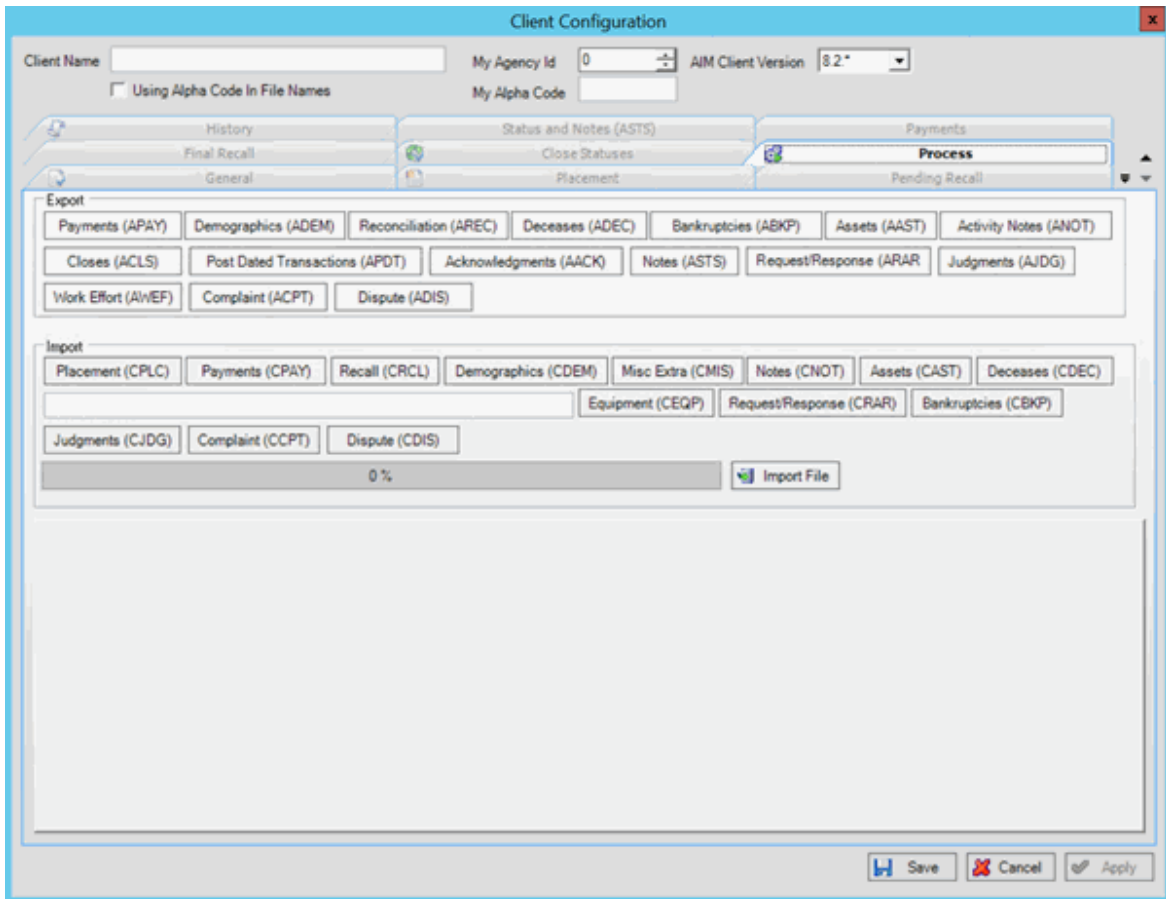
Last Received Placement Pending Recall Final Recall Payment Demographic Notes Misc Extra Data Equipment Request/Response Judgment Deceased Bankruptcy Complaint Dispute

Last Sent Recall Objection Payment Demographic Close Bankruptcy Deceased Reconciliation Request/Response Acknowledgment Asset Judgment Status/Notes Activity Notes Work Efforts

Complaint Dispute

Save Cancel Apply

2. Click the **Process** tab.



3. In the **Import** section, click **Payments (CPAY)**. The **Open** dialog box appears.
4. Click the Payment file to import and then click **Open**. A notification dialog box appears, which shows the number of records and total payments in the file.
5. Click **OK**. Data from the file appears in the preview window.
6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
7. Click **OK**.
8. To review any processing errors, click the **History** tab.

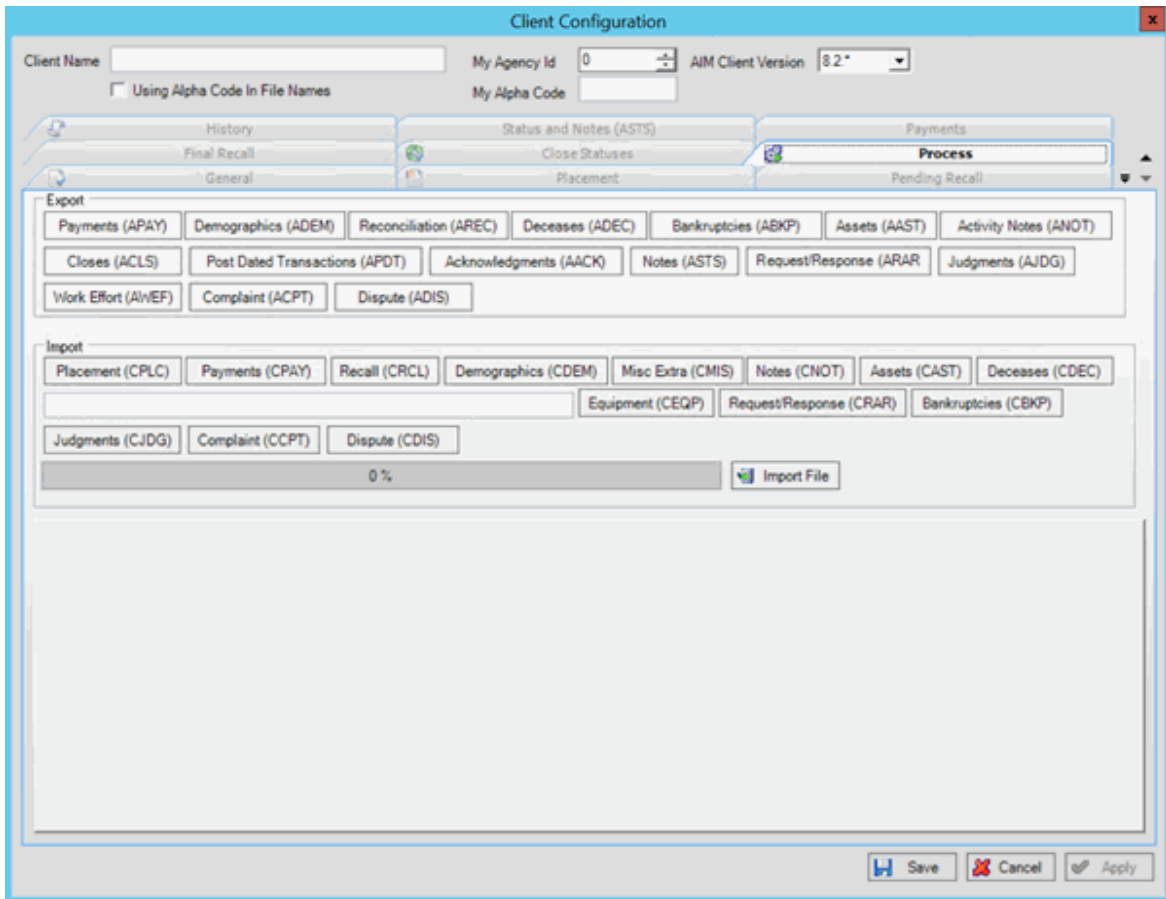
Import Requests and Responses

Use the **Process** tab in the **Client Configuration** window to import account placement and recall requests from the client.

To import requests and responses

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

2. Click the **Process** tab.



3. In the **Import** section, click **Request/Response (CRAR)**. The **Open** dialog box appears.
4. Click the Request/Response file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
5. Click **OK**. Data from the file appears in the preview window.
6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
7. Click **OK**.
8. To review any processing errors, click the **History** tab.

Export Overview

Export Overview

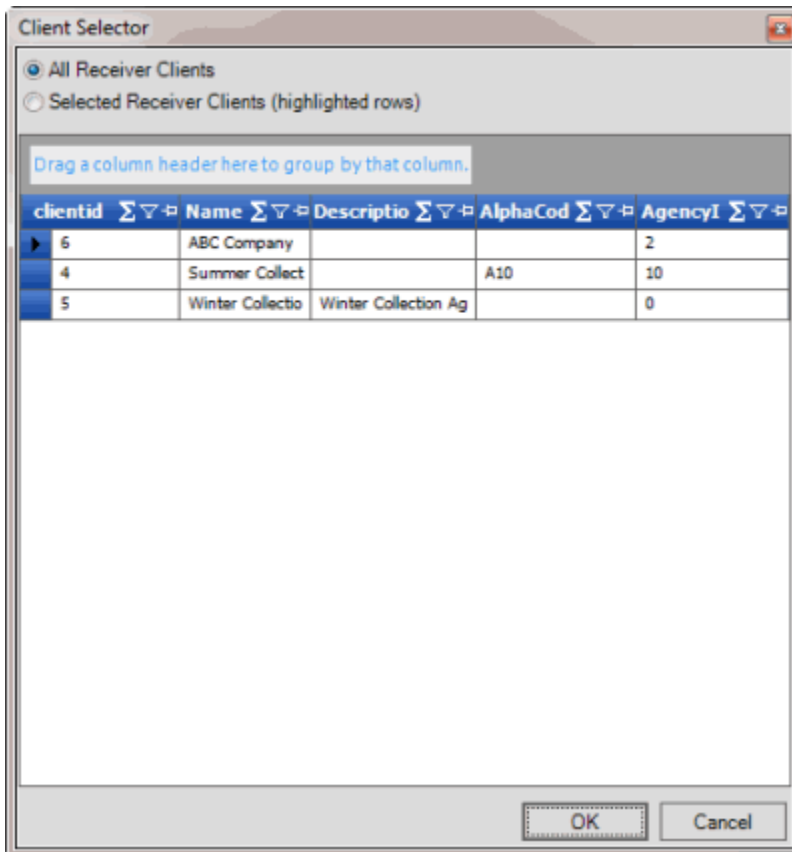
You have two options for exporting data from AIM Receiver. The first option is to export data for one or more clients for a specific type of data (for example, payments, recalls, notes). The second option is to export data for a specific client and type of data. Your client imports the exported data into AIM and AIM updates the account information in Latitude.

Export Data for Multiple Clients

Use the **Export** option in the **Actions** menu to export account updates for a specific type of data for clients that placed accounts with your organization. Data types include bankruptcy, account closings, deceased debtor, demographics, notes, post-dated transactions, and reconciliation. For information about exporting acknowledgments or payments, see [Export Acknowledgments for One or More Clients](#) or [Export Payments for One or More Clients](#).

To export data for multiple clients

1. In the menu bar, click **Actions** > **Export** > and then click the type of data to export. The **Browse for Folder** dialog box appears.
2. Click the folder to export the files to and then click **OK**. The **Client Selector** dialog box appears.



3. Do one of the following:
 - To export data for all clients, click **All Receiver Clients**.
 - To export data for specific clients, click **Selected Receiver Clients** and then click the clients to include in the export file.

Tip: To select multiple sequential clients, press and hold the **Shift** key and then click the first and last sequential client. To select multiple non-sequential clients, press and hold the **Ctrl** key and then click each client.

4. Click **OK**. A notification dialog box appears.

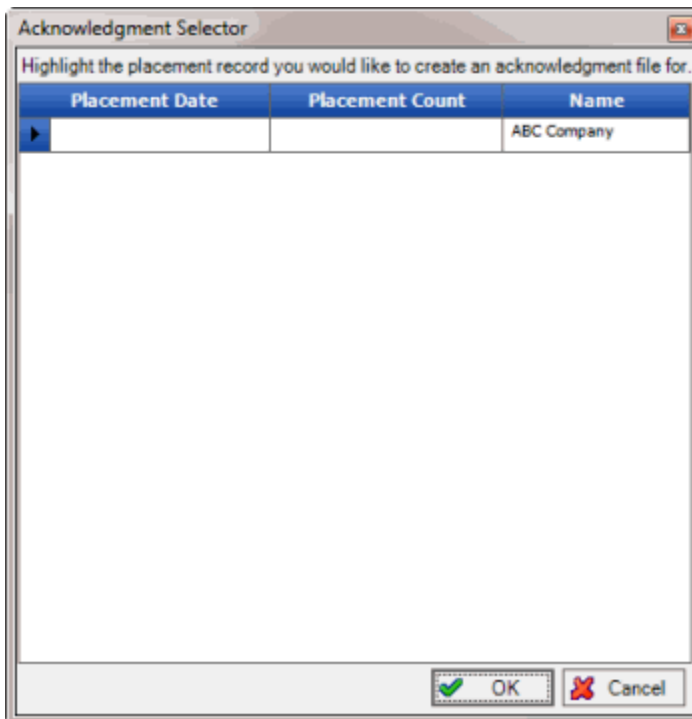
5. Click **OK**.

Export Acknowledgments for Multiple Clients

Use the **Export** option in the **Actions** menu to export acknowledgments indicating that your organization received data for the accounts that clients placed with your organization.

To export acknowledgments for multiple clients

1. In the menu bar, click **Actions > Export > Acknowledgments**. The **Browse for Folder** dialog box appears.
2. Click the folder to export the files to and then click **OK**. The **Acknowledgment Selector** dialog box appears.



3. Click the account placements to acknowledge.

Tip: To select multiple sequential placements, press and hold the **Shift** key and then click the first and last sequential placement. To select multiple non-sequential placements, press and hold the **Ctrl** key and then click each placement.

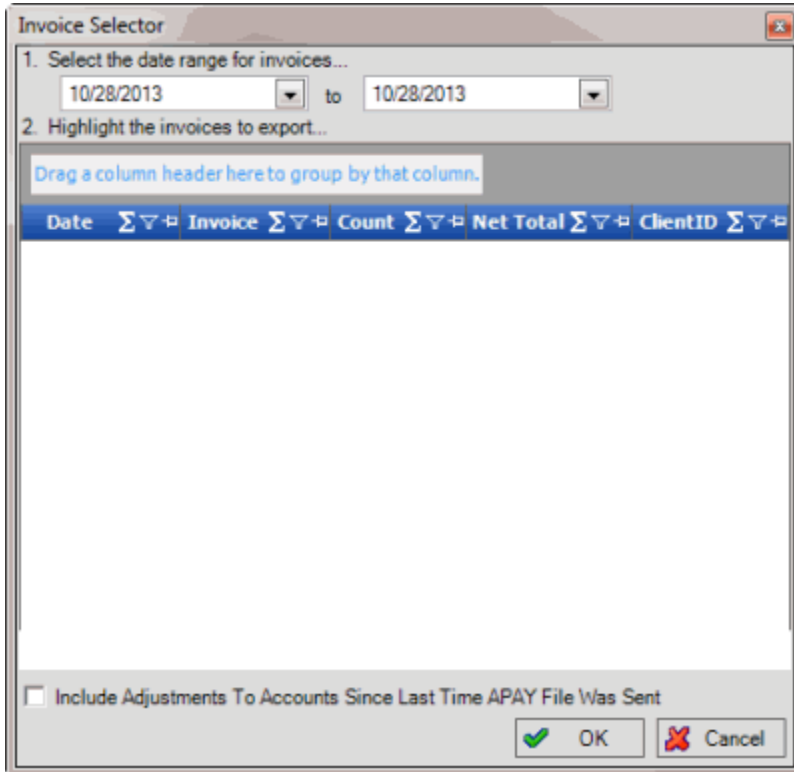
4. Click **OK**. A notification dialog box appears.
5. Click **OK**.

Export Payments for Multiple Clients

Use the **Export** option in the **Actions** menu to export payments and adjustments that your organization received for accounts that clients placed with your organization.

To export payments for multiple clients

1. In the menu bar, click **Actions > Export > Payments**. The **Browse for Folder** dialog box appears.
2. Click the folder to export the files to and then click **OK**. The **Invoice Selector** dialog box appears.



3. Specify the date range for the invoices to include in the export file. The dialog box displays all invoices that your organization generated during the specified date range.
4. Click the invoices to include in the export file. The **Net Total** signifies the total payments and reversals combined.

Tip: To select multiple sequential invoices, press and hold the **Shift** key and then click the first and last sequential invoice. To select multiple non-sequential invoices, press and hold the **Ctrl** key and then click each invoice.

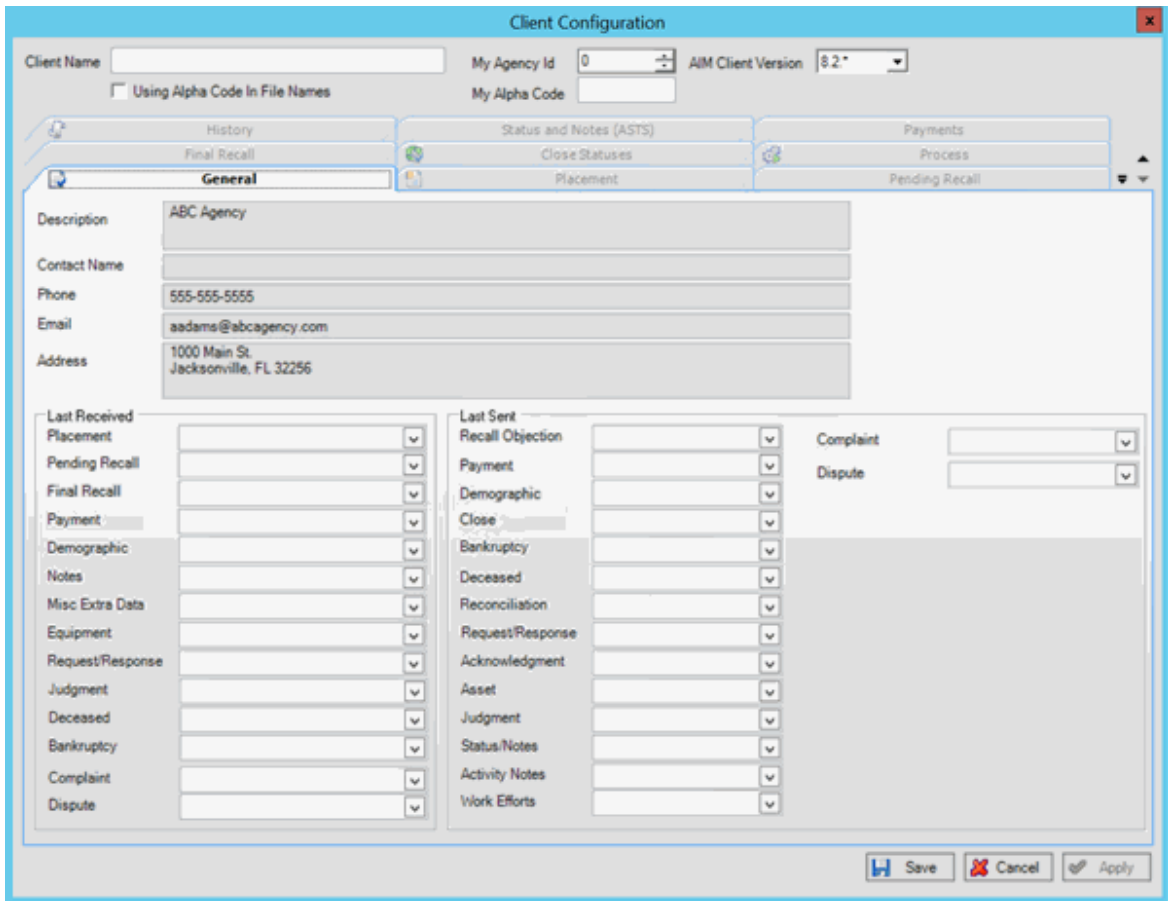
5. To include invoiced DA (decreasing adjustment) or DAR (decreasing adjustment reversal) transactions in the export file, select the **Include Adjustments to Accounts Since Last Time APAY File Was Sent** check box.
6. Click **OK**. The **Save As** dialog box appears.
7. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
8. Click **OK**.

Export Account Closings

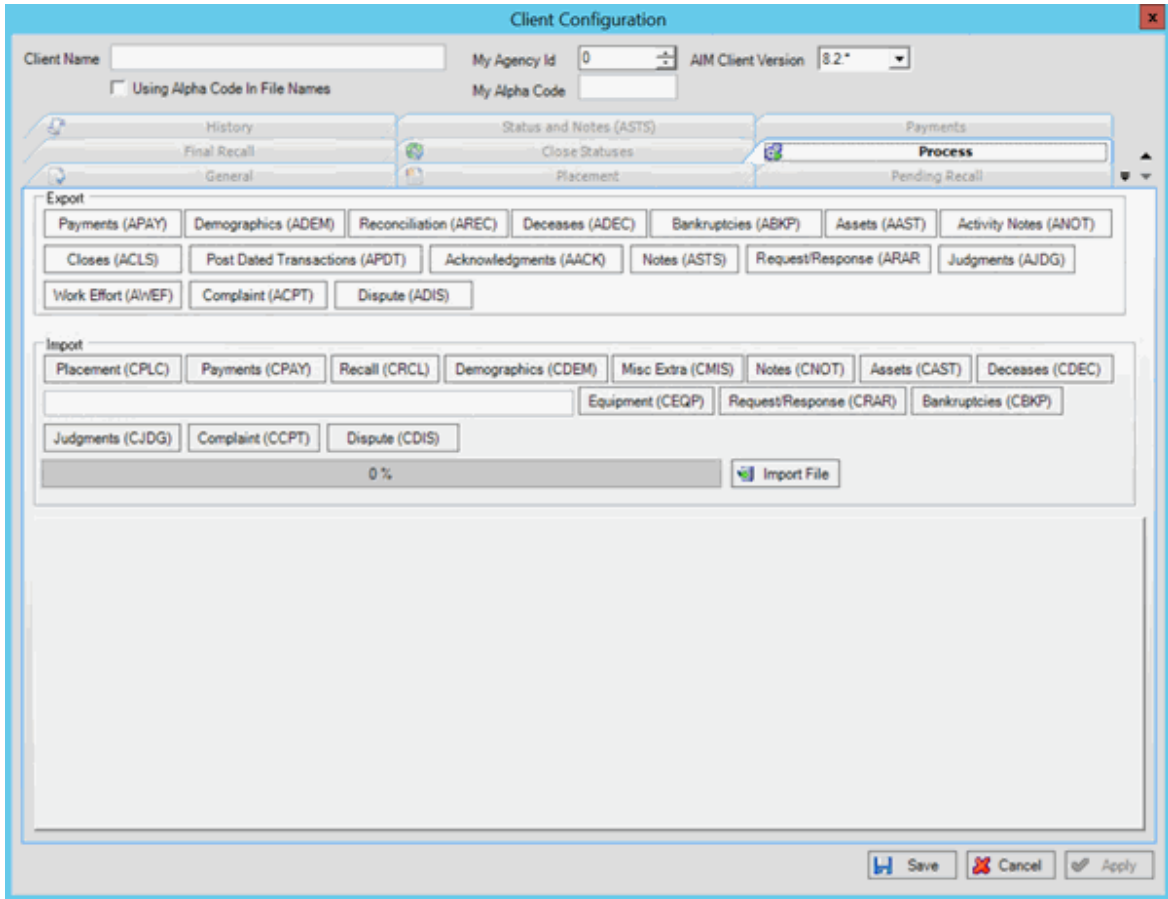
Use the **Process** tab in the **Client Configuration** window to export data for accounts that your organization has closed for the client. You cannot export account closings without assigning the number of hold days. For more information, see [Configure Close Status Codes](#).

To export account closings

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.



2. Click the **Process** tab.



3. In the **Export** section, click **Closes (ACLS)**. The **Save As** dialog box appears.
4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
5. Click **OK**.

Export Account Notes

Use the **Process** tab in the **Client Configuration** window to export notes that your organization added or updated for accounts that the client placed with your organization.

To export account notes

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

Client Configuration

Client Name My Agency Id AIM Client Version

Using Alpha Code In File Names My Alpha Code

History Status and Notes (ASTS) Payments

Final Recall Close Statuses Process

General Placement Pending Recall

Description

Contact Name

Phone

Email

Address

Last Received Placement Pending Recall Final Recall Payment Demographic Notes Misc Extra Data Equipment Request/Response Judgment Deceased Bankruptcy Complaint Dispute

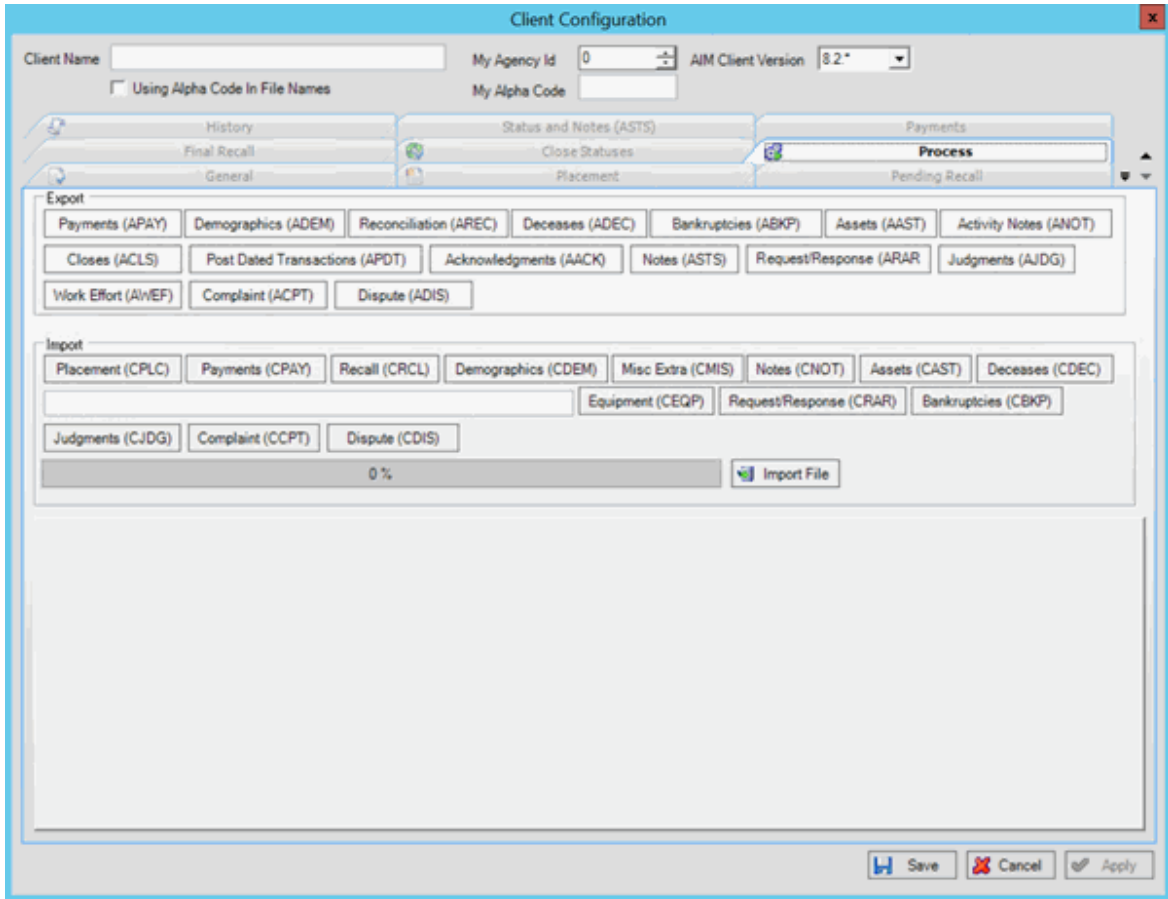
Last Sent Recall Objection Payment Demographic Close Bankruptcy Deceased Reconciliation Request/Response Acknowledgment Asset Judgment Status/Notes Activity Notes Work Efforts

Complaint

Dispute

Save Cancel Apply

2. Click the **Process** tab.



3. In the **Export** section, click **Notes (ANOT)**. The **Save As** dialog box appears.
4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
5. Click **OK**.

Export Acknowledgments

Use the **Process** tab in the **Client Configuration** window to export acknowledgments indicating that your organization received data for the accounts that the client placed with your organization.

To export acknowledgments

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

Client Configuration

Client Name My Agency Id AIM Client Version

Using Alpha Code In File Names My Alpha Code

History Status and Notes (ASTS) Payments

Final Recall Close Statuses Process

General Placement Pending Recall

Description

Contact Name

Phone

Email

Address

Last Received Placement Pending Recall Final Recall Payment Demographic Notes Misc Extra Data Equipment Request/Response Judgment Deceased Bankruptcy Complaint Dispute

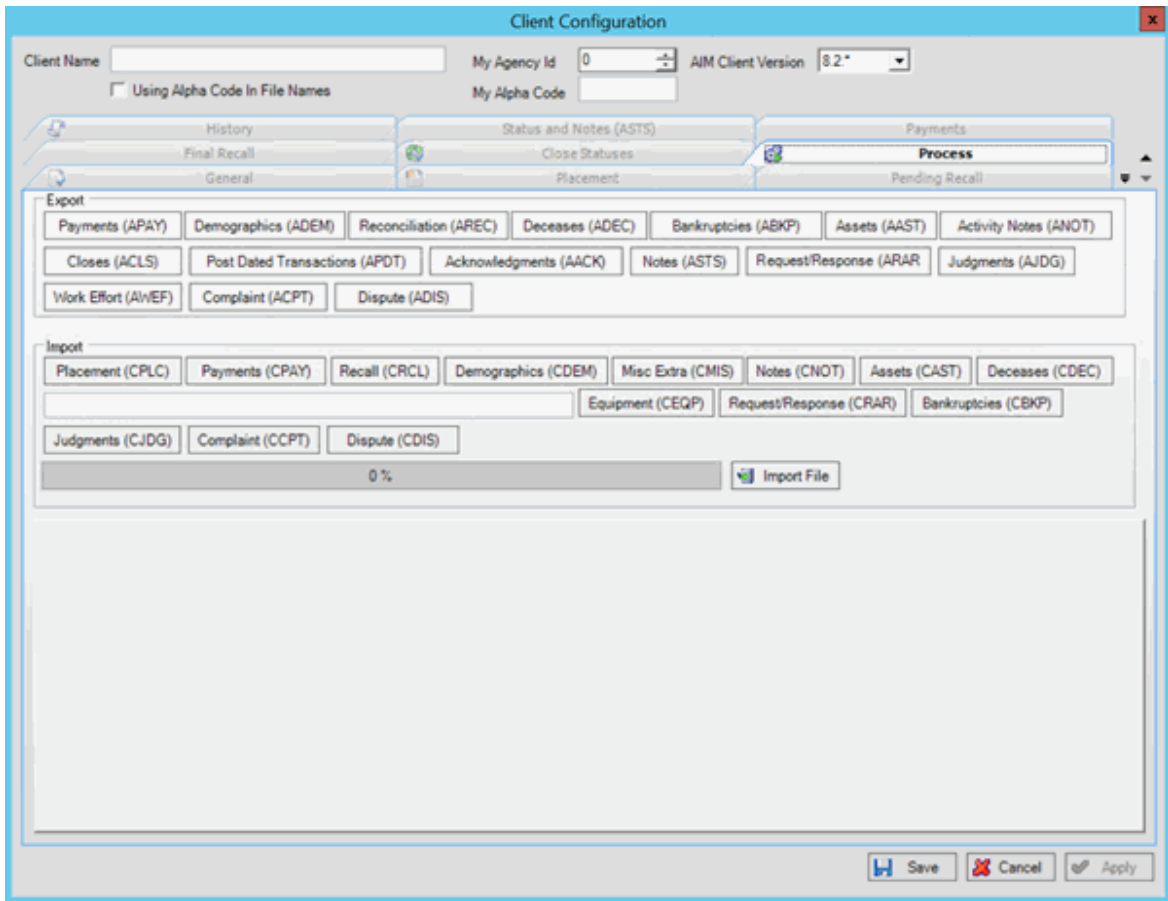
Last Sent Recall Objection Payment Demographic Close Bankruptcy Deceased Reconciliation Request/Response Acknowledgment Asset Judgment Status/Notes Activity Notes Work Efforts

Complaint

Dispute

Save Cancel Apply

2. Click the **Process** tab.



3. In the **Export** section, click **Acknowledgments (AACK)**. The **Save As** dialog box appears.
4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
5. Click **OK**.

Export Assets

Use the **Process** tab in the **Client Configuration** window to export assets that your organization added or updated for accounts that the client placed with your organization.

To export assets

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

Client Configuration

Client Name My Agency Id AIM Client Version

Using Alpha Code In File Names My Alpha Code

History Status and Notes (ASTS) Payments

Final Recall Close Statuses Process

General Placement Pending Recall

Description

Contact Name

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Last Received Placement Pending Recall Final Recall Payment Demographic Notes Misc Extra Data Equipment Request/Response Judgment Deceased Bankruptcy Complaint Dispute

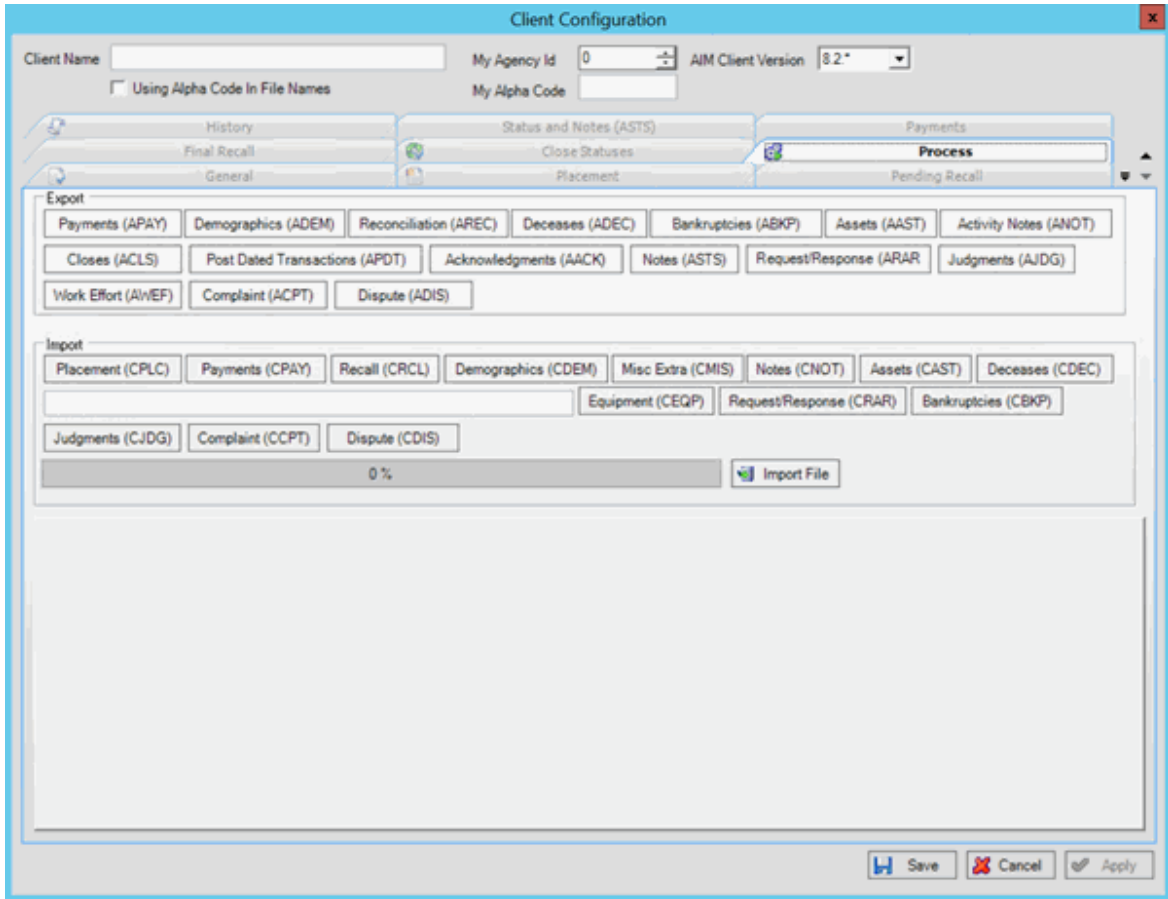
Last Sent Recall Objection Payment Demographic Close Bankruptcy Deceased Reconciliation Request/Response Acknowledgment Asset Judgment Status/Notes Activity Notes Work Efforts

Complaint

Dispute

Save Cancel Apply

2. Click the **Process** tab.



3. In the **Export** section, click **Assets (AAS)**. The **Save As** dialog box appears.
4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
5. Click **OK**.

Export Bankruptcy Data

Use the **Process** tab in the **Client Configuration** window to export bankruptcy data that your organization added or updated for accounts that the client placed with your organization.

To export bankruptcy data

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

Client Configuration

Client Name My Agency Id AIM Client Version

Using Alpha Code In File Names My Alpha Code

History Status and Notes (ASTS) Payments

Final Recall Close Statuses Process

General Placement Pending Recall

Description

Contact Name

Phone

Email

Address

Last Received Placement Pending Recall Final Recall Payment Demographic Notes Misc Extra Data Equipment Request/Response Judgment Deceased Bankruptcy Complaint Dispute

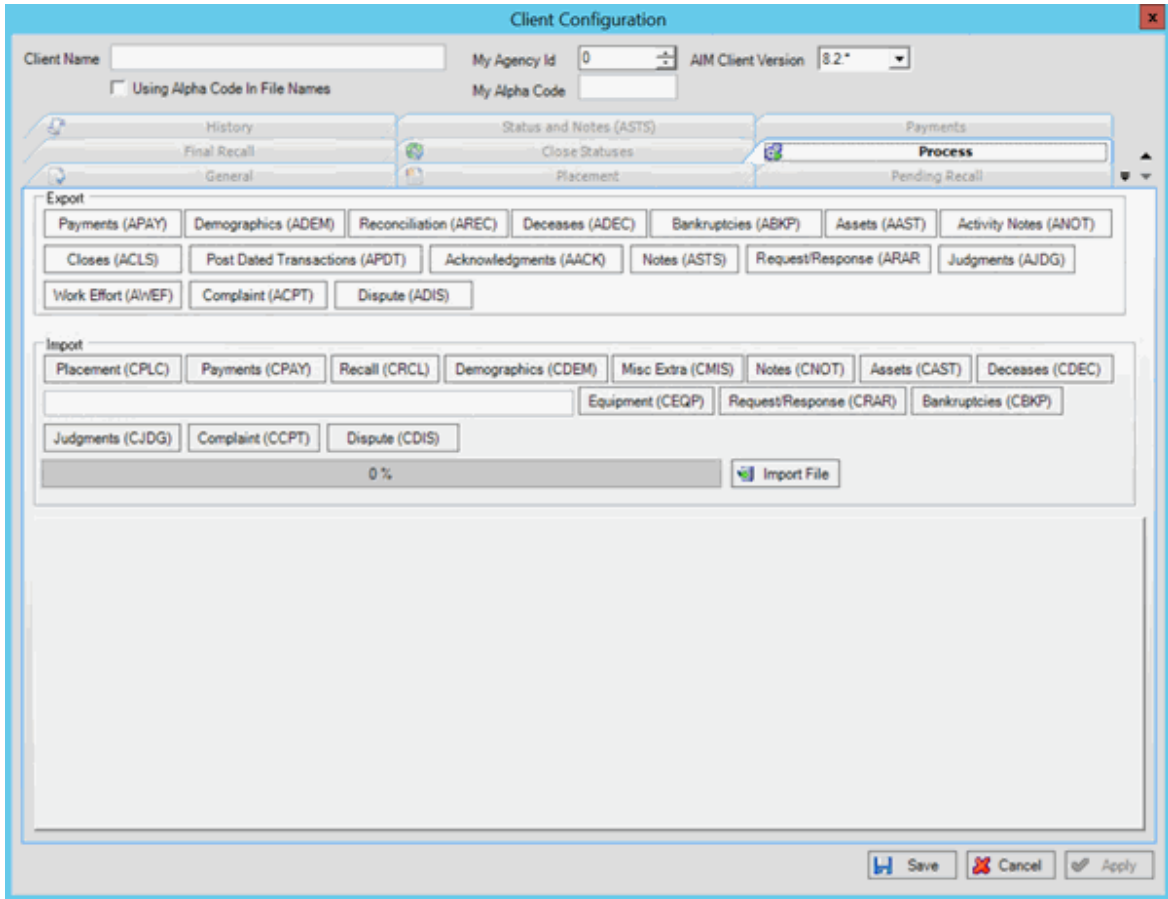
Last Sent Recall Objection Payment Demographic Close Bankruptcy Deceased Reconciliation Request/Response Acknowledgment Asset Judgment Status/Notes Activity Notes Work Efforts

Complaint

Dispute

Save Cancel Apply

2. Click the **Process** tab.



3. In the **Export** section, click **Bankruptcies (ABKP)**. The **Save As** dialog box appears.
4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
5. Click **OK**.

Export Deceased Debtor Data

Use the **Process** tab in the **Client Configuration** window to export data for debtors who became deceased after the client placed the accounts with your organization. The export file only includes accounts with an open status.

To export deceased debtor data

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

Client Configuration

Client Name My Agency Id AIM Client Version

Using Alpha Code In File Names My Alpha Code

History Status and Notes (ASTS) Payments

Final Recall Close Statuses Process

General Placement Pending Recall

Description

Contact Name

Phone

Email

Address

Last Received Placement Pending Recall Final Recall Payment Demographic Notes Misc Extra Data Equipment Request/Response Judgment Deceased Bankruptcy Complaint Dispute

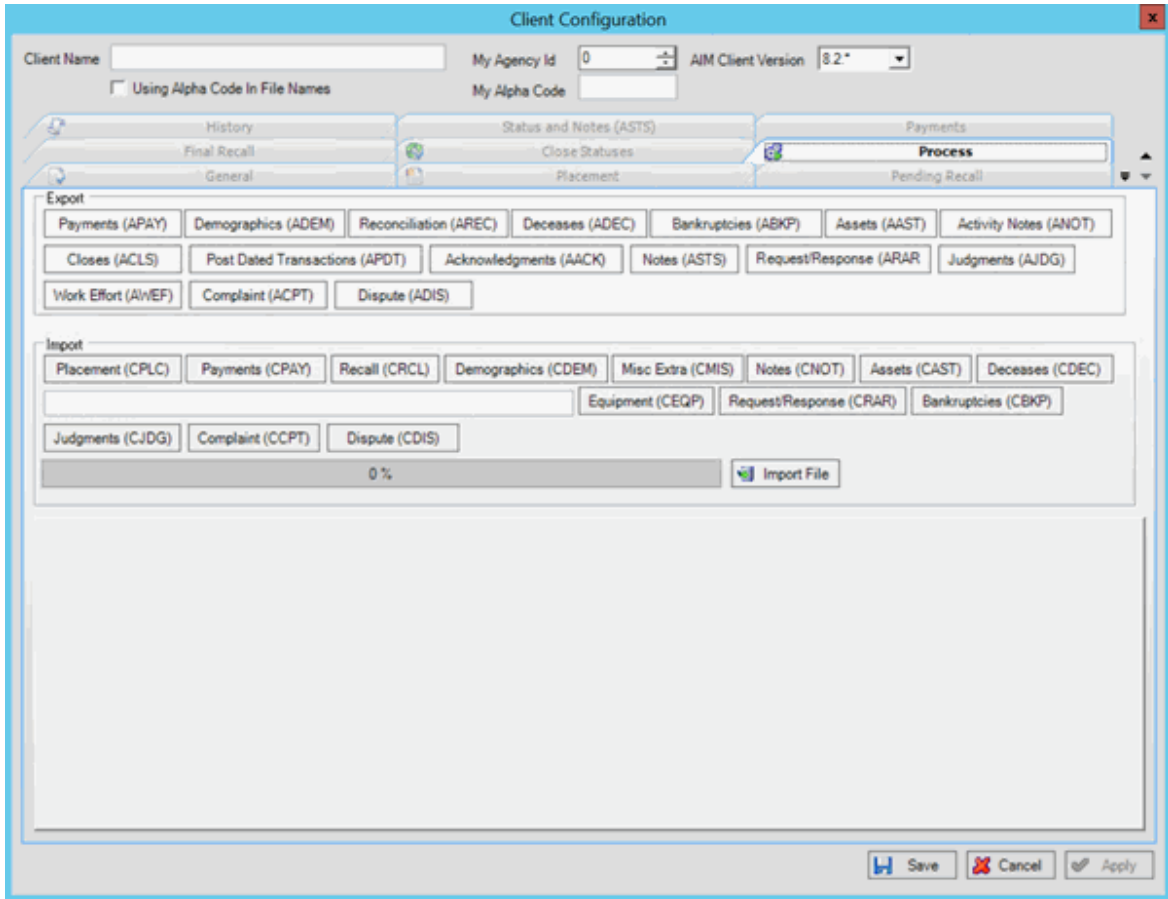
Last Sent Recall Objection Payment Demographic Close Bankruptcy Deceased Reconciliation Request/Response Acknowledgment Asset Judgment Status/Notes Activity Notes Work Efforts

Complaint

Dispute

Save Cancel Apply

2. Click the **Process** tab.



3. In the **Export** section, click **Deceases (ADEC)**. The **Save As** dialog box appears.
4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
5. Click **OK**.

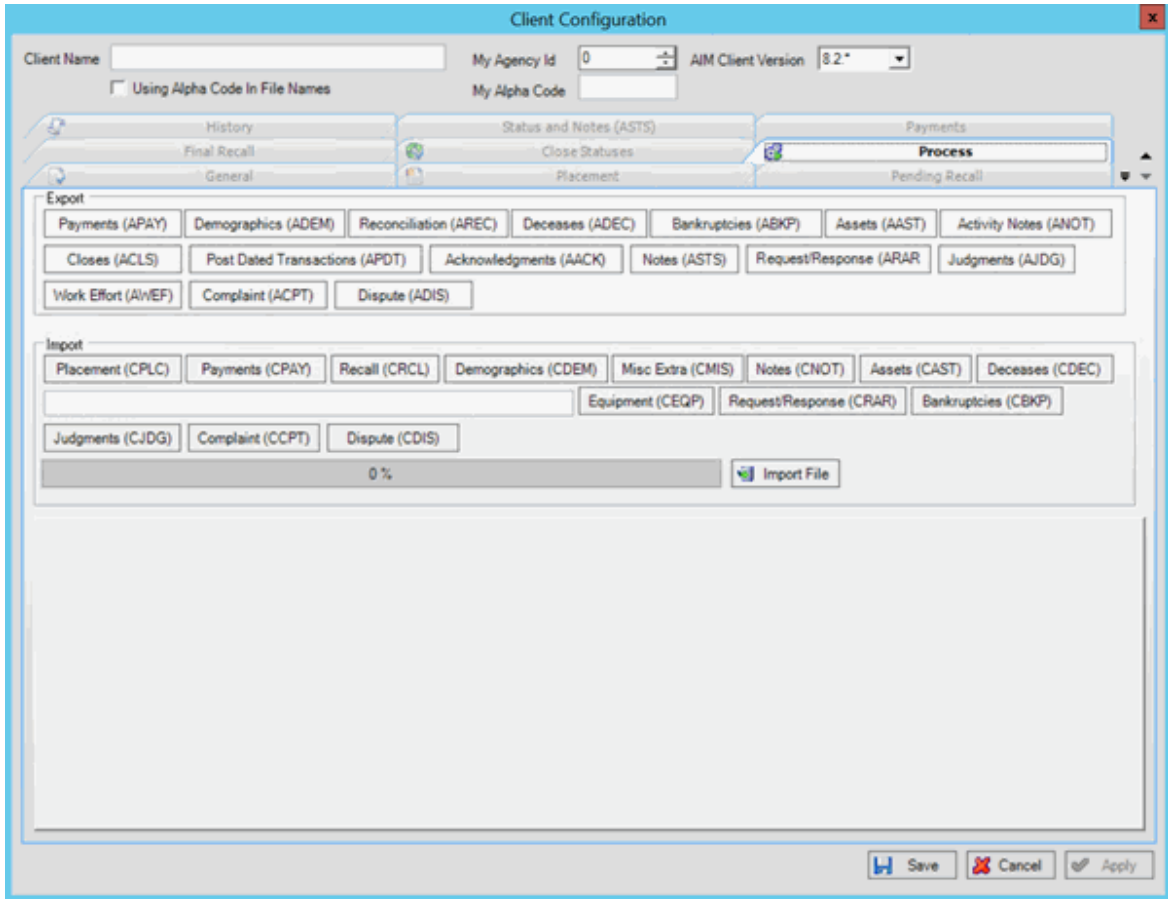
Export Demographic Data

Use the **Process** tab in the **Client Configuration** window to export phones and addresses that your organization added or updated for accounts that the client placed with your organization.

To export demographic data

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

2. Click the **Process** tab.



3. In the **Export** section, click **Demographics (ADEM)**. The **Save As** dialog box appears.
4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
5. Click **OK**.

Export Judgment Data

Use the **Process** tab in the **Client Configuration** window to export judgment data that your organization added or updated for accounts that the client placed with your organization.

To export judgment data

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

Client Configuration

Client Name My Agency Id AIM Client Version

Using Alpha Code In File Names My Alpha Code

History Status and Notes (ASTS) Payments

Final Recall Close Statuses Process

General Placement Pending Recall

Description

Contact Name

Phone

Email

Address

Last Received Placement Pending Recall Final Recall Payment Demographic Notes Misc Extra Data Equipment Request/Response Judgment Deceased Bankruptcy Complaint Dispute

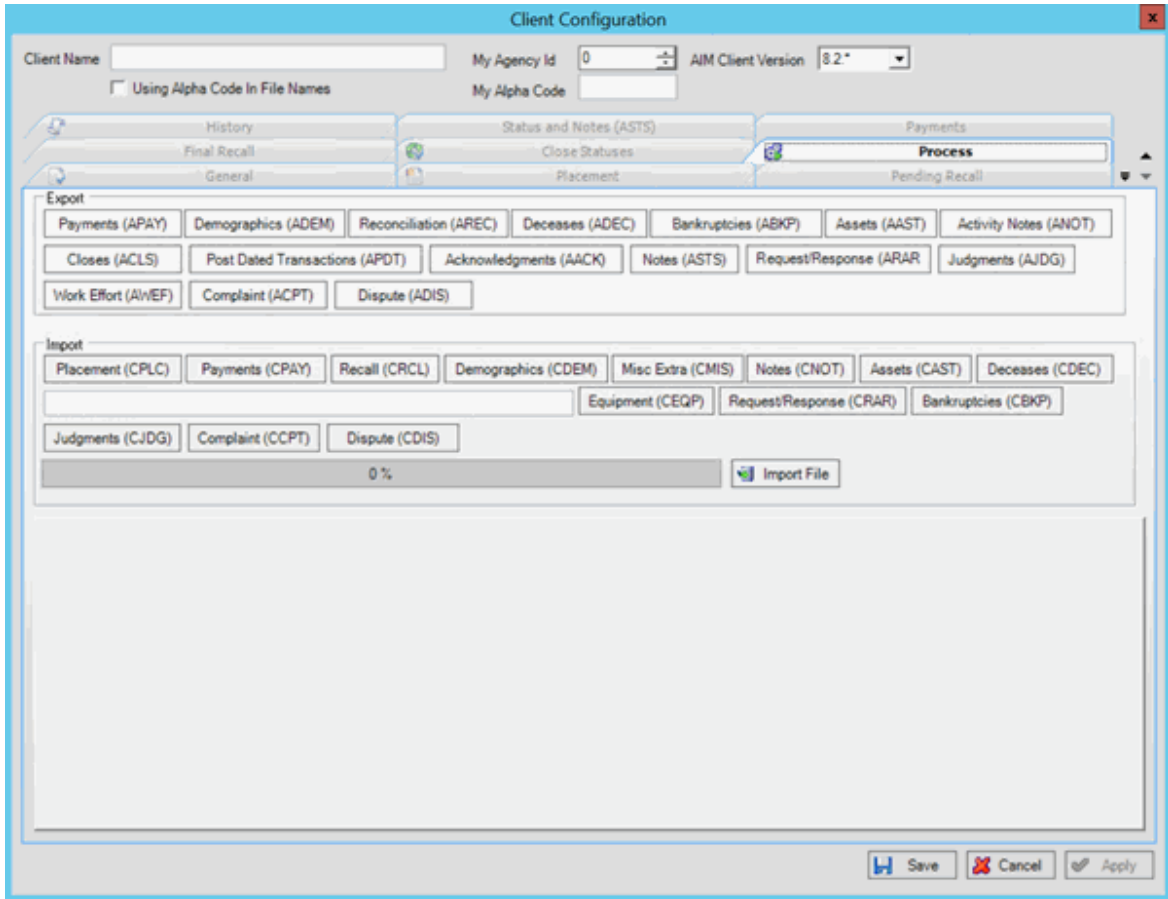
Last Sent Recall Objection Payment Demographic Close Bankruptcy Deceased Reconciliation Request/Response Acknowledgment Asset Judgment Status/Notes Activity Notes Work Efforts

Complaint

Dispute

Save Cancel Apply

2. Click the **Process** tab.



3. In the **Export** section, click **Judgments (AJDG)**. The **Save As** dialog box appears.
4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
5. Click **OK**.

Export Payments

Use the **Process** tab in the **Client Configuration** window to export payments and adjustments that your organization received for accounts that the client placed with your organization. The export file only includes payments that you invoiced to the client using the Invoices program.

To export payments

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

Client Configuration

Client Name My Agency Id AIM Client Version

Using Alpha Code In File Names My Alpha Code

History Status and Notes (ASTS) Payments

Final Recall Close Statuses Process

General Placement Pending Recall

Description

Contact Name

Phone

Email

Address

Last Received Placement Pending Recall Final Recall Payment Demographic Notes Misc Extra Data Equipment Request/Response Judgment Deceased Bankruptcy Complaint Dispute

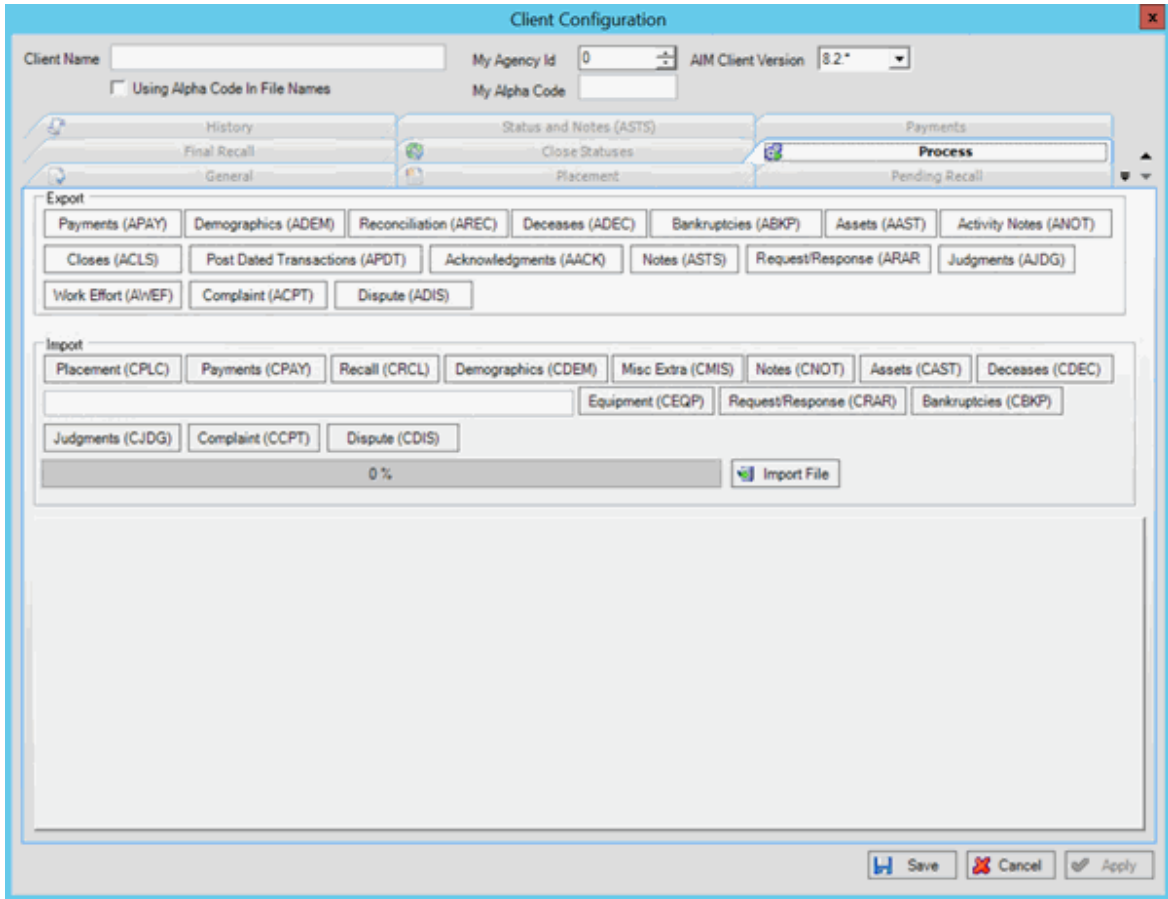
Last Sent Recall Objection Payment Demographic Close Bankruptcy Deceased Reconciliation Request/Response Acknowledgment Asset Judgment Status/Notes Activity Notes Work Efforts

Complaint

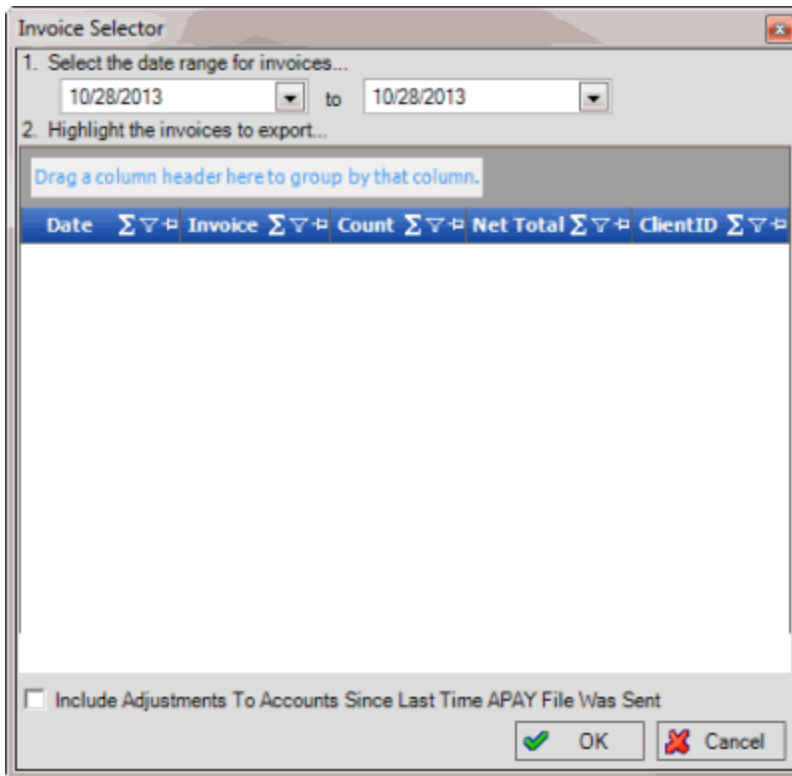
Dispute

Save Cancel Apply

2. Click the **Process** tab.



3. In the **Export** section, click **Payments (APAY)**. The **Invoice Selector** dialog box appears.



4. Specify the date range for the invoices to include in the export file. The dialog box displays all invoices that your organization generated for the client during the specified date range.
5. Click the invoices to include in the export file. The **Net Total** signifies the total payments and reversals combined.

Tip: To select multiple sequential invoices, press and hold the **Shift** key and then click the first and last sequential invoice. To select multiple non-sequential invoices, press and hold the **Ctrl** key and then click each invoice.

6. To include invoiced DA (decreasing adjustment) or DAR (decreasing adjustment reversal) transactions in the export file, select the **Include Adjustments to Accounts Since Last Time APAY File Was Sent** check box.
7. Click **OK**. The **Save As** dialog box appears.
8. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
9. Click **OK**.

Export Post-Dated Transactions

Use the **Process** tab in the **Client Configuration** window to export post-dated transactions that your organization added or updated for accounts that the client placed with your organization. The export file includes all post-dated transactions for accounts that the client placed with your organization, even ones reported previously.

To export post-dated transactions

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

Client Configuration

Client Name My Agency Id AIM Client Version

Using Alpha Code In File Names My Alpha Code

History Status and Notes (ASTS) Payments
Final Recall Close Statuses Process
General Placement Pending Recall

Description ABC Agency

Contact Name

Phone 555-555-5555

Email aadams@abcagency.com

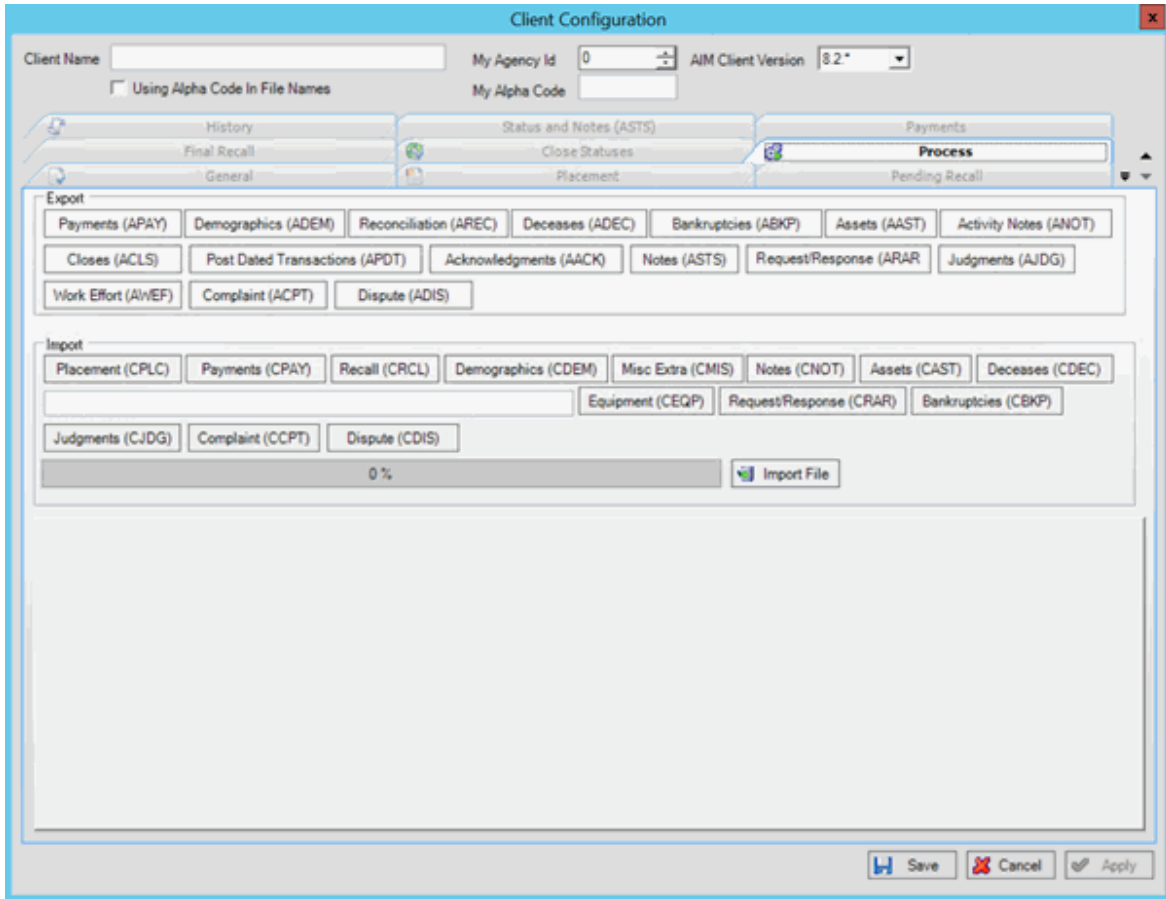
Address 1000 Main St
Jacksonville, FL 32256

Last Received Placement Pending Recall Final Recall Payment Demographic Notes Misc Extra Data Equipment Request/Response Judgment Deceased Bankruptcy Complaint Dispute

Last Sent Recall Objection Payment Demographic Close Bankruptcy Deceased Reconciliation Request/Response Acknowledgment Asset Judgment Status/Notes Activity Notes Work Efforts

Save Cancel Apply

2. Click the **Process** tab.



3. In the **Export** section, click **Post Dated Transactions (APDT)**. The **Save As** dialog box appears.
4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
5. Click **OK**.

Export Reconciliation Data

Use the **Process** tab in the **Client Configuration** window to export account data for all accounts that the client placed with your organization.

To export reconciliation data

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

Client Configuration

Client Name My Agency Id AIM Client Version

Using Alpha Code In File Names My Alpha Code

History Status and Notes (ASTS) Payments
Final Recall Close Statuses Process
General Placement Pending Recall

Description

Contact Name

Phone

Email

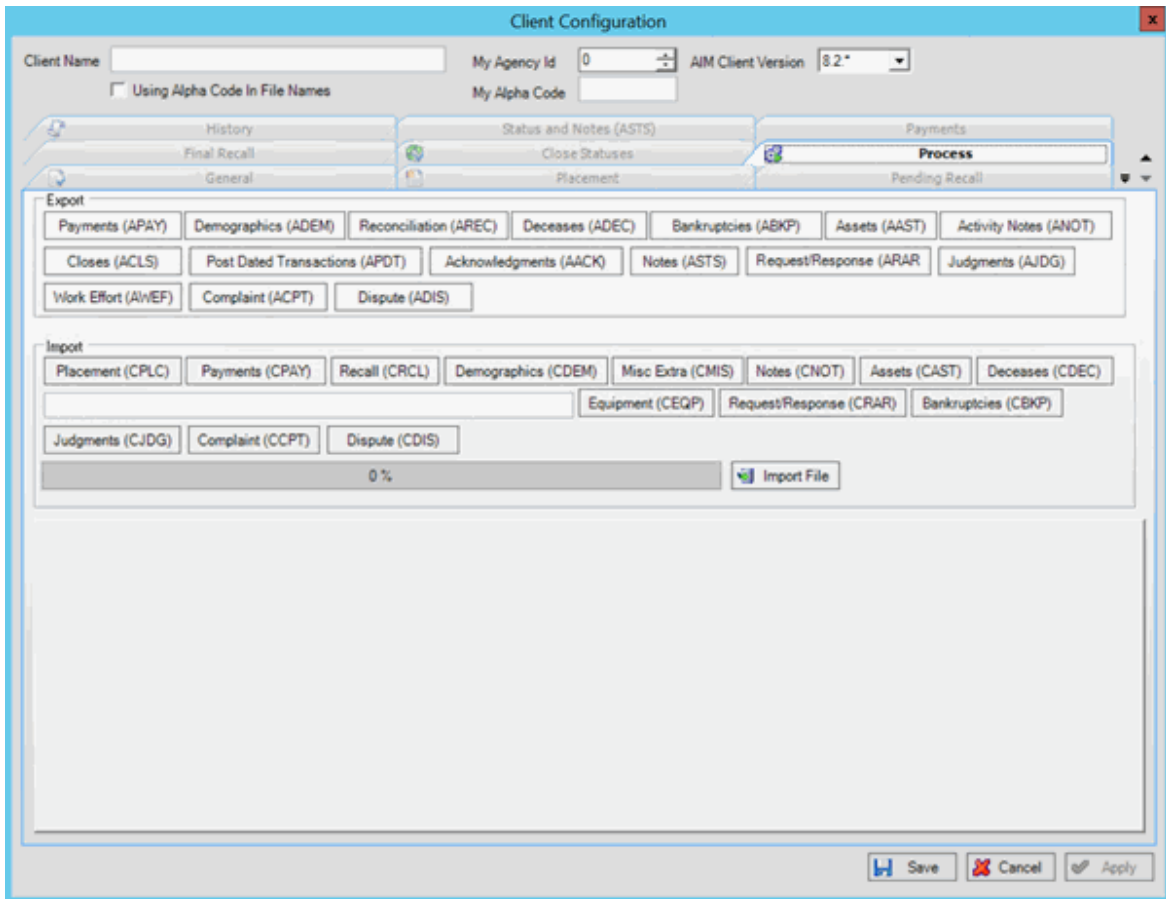
Address

Last Received
Placement
Pending Recall
Final Recall
Payment
Demographic
Notes
Misc Extra Data
Equipment
Request/Response
Judgment
Deceased
Bankruptcy
Complaint
Dispute

Last Sent
Recall Objection
Payment
Demographic
Close
Bankruptcy
Deceased
Reconciliation
Request/Response
Acknowledgment
Asset
Judgment
Status/Notes
Activity Notes
Work Efforts

Complaint
Dispute

2. Click the **Process** tab.



3. In the **Export** section, click **Reconciliation (AREC)**. The **Save As** dialog box appears.
4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
5. Click **OK**.

Export Requests and Responses

Use the **Process** tab in the **Client Configuration** window to export responses to account placement requests that your organization received from the client.

To export requests and responses

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

Client Configuration

Client Name My Agency Id AIM Client Version

Using Alpha Code In File Names My Alpha Code

History Status and Notes (ASTS) Payments

Final Recall Close Statuses Process

General Placement Pending Recall

Description

Contact Name

Phone

Email

Address

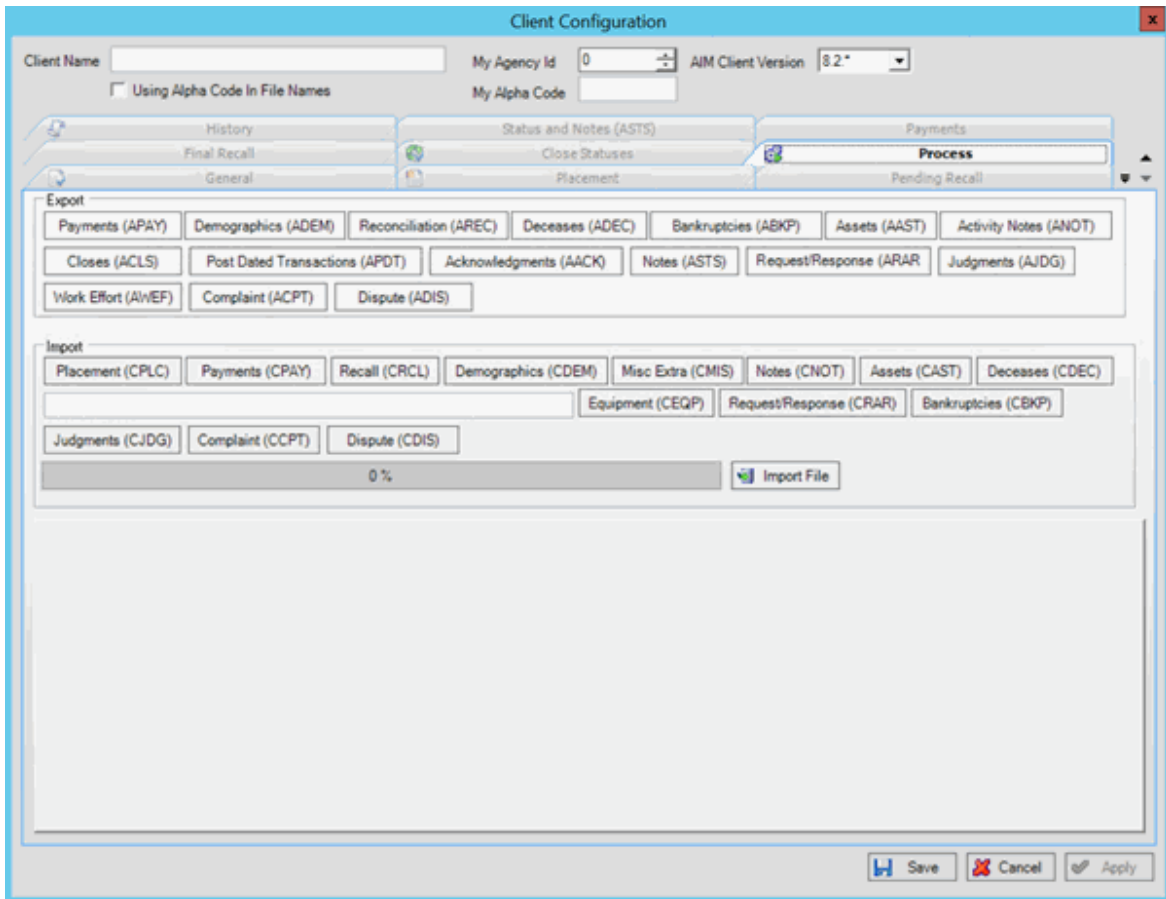
Last Received Placement Pending Recall Final Recall Payment Demographic Notes Misc Extra Data Equipment Request/Response Judgment Deceased Bankruptcy Complaint Dispute

Last Sent Recall Objection Payment Demographic Close Bankruptcy Deceased Reconciliation Request/Response Acknowledgment Asset Judgment Status/Notes Activity Notes Work Efforts

Complaint

Dispute

2. Click the **Process** tab.



3. In the **Export** section, click **Request/Response (ARAR)**. The **Save As** dialog box appears.
4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
5. Click **OK**.

Export Status Notes

Use the **Process** tab in the **Client Configuration** window to export status changes notes your organization added or updated for accounts that the client placed with your organization.

To export status notes

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

Client Configuration

Client Name My Agency Id My Alpha Code AIM Client Version

Using Alpha Code In File Names

History Status and Notes (ASTS) Payments

Final Recall Close Statuses Process

General Placement Pending Recall

Description

Contact Name

Phone

Email

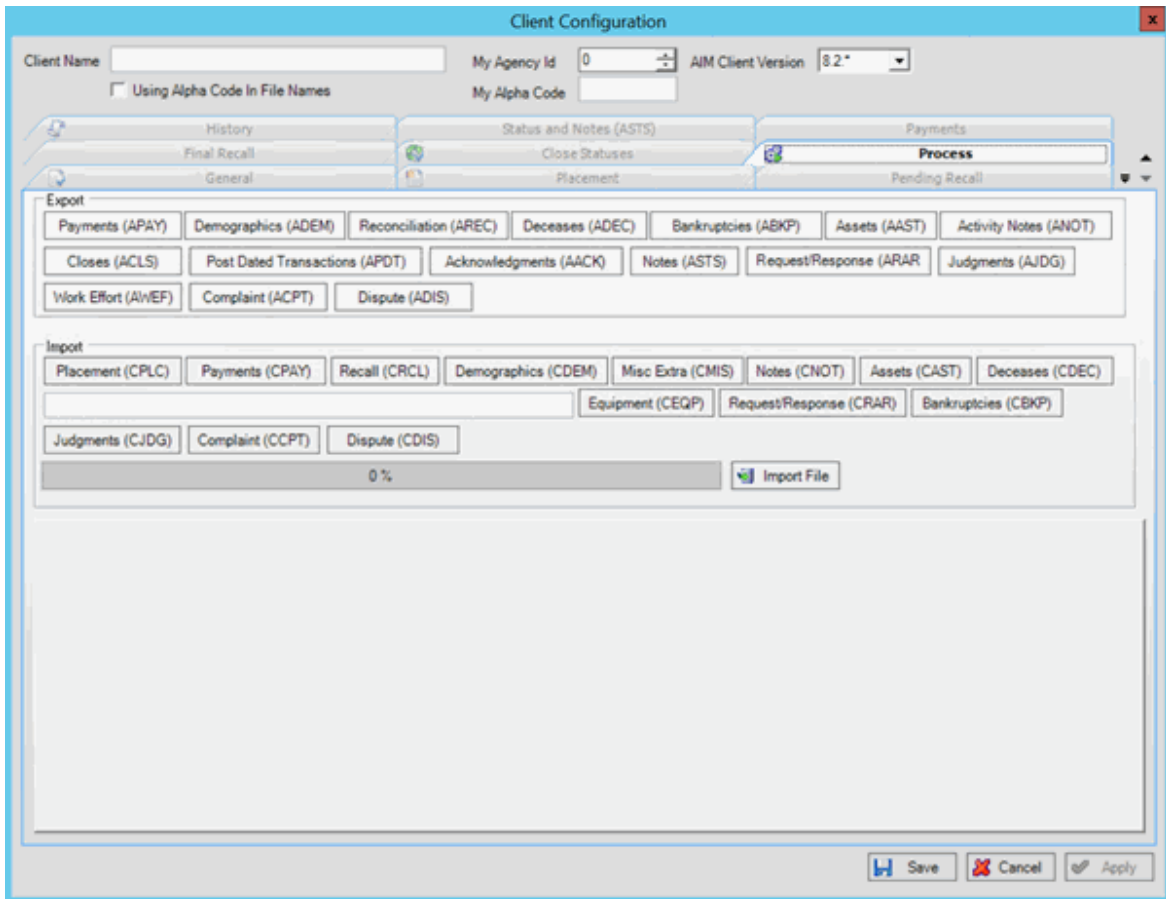
Address

Last Received Placement Pending Recall Final Recall Payment Demographic Notes Misc Extra Data Equipment Request/Response Judgment Deceased Bankruptcy Complaint Dispute

Last Sent Recall Objection Payment Demographic Close Bankruptcy Deceased Reconciliation Request/Response Acknowledgment Asset Judgment Status/Notes Activity Notes Work Efforts

Complaint Dispute

2. Click the **Process** tab.



3. In the **Export** section, click **Notes (ASTS)**. The **Save As** dialog box appears.
4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
5. Click **OK**.

Export Work Effort

Use the **Process** tab in the **Client Configuration** window to export work efforts that your organization added or updated for accounts that the client placed with your organization.

To export status notes

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

Client Configuration

Client Name My Agency Id AIM Client Version Using Alpha Code In File Names My Alpha Code

History Status and Notes (ASTS) Payments
Final Recall Close Statuses Process
General Placement Pending Recall

Description ABC Agency

Contact Name

Phone 555-555-5555

Email aadams@abcagency.com

Address 1000 Main St, Jacksonville, FL 32256

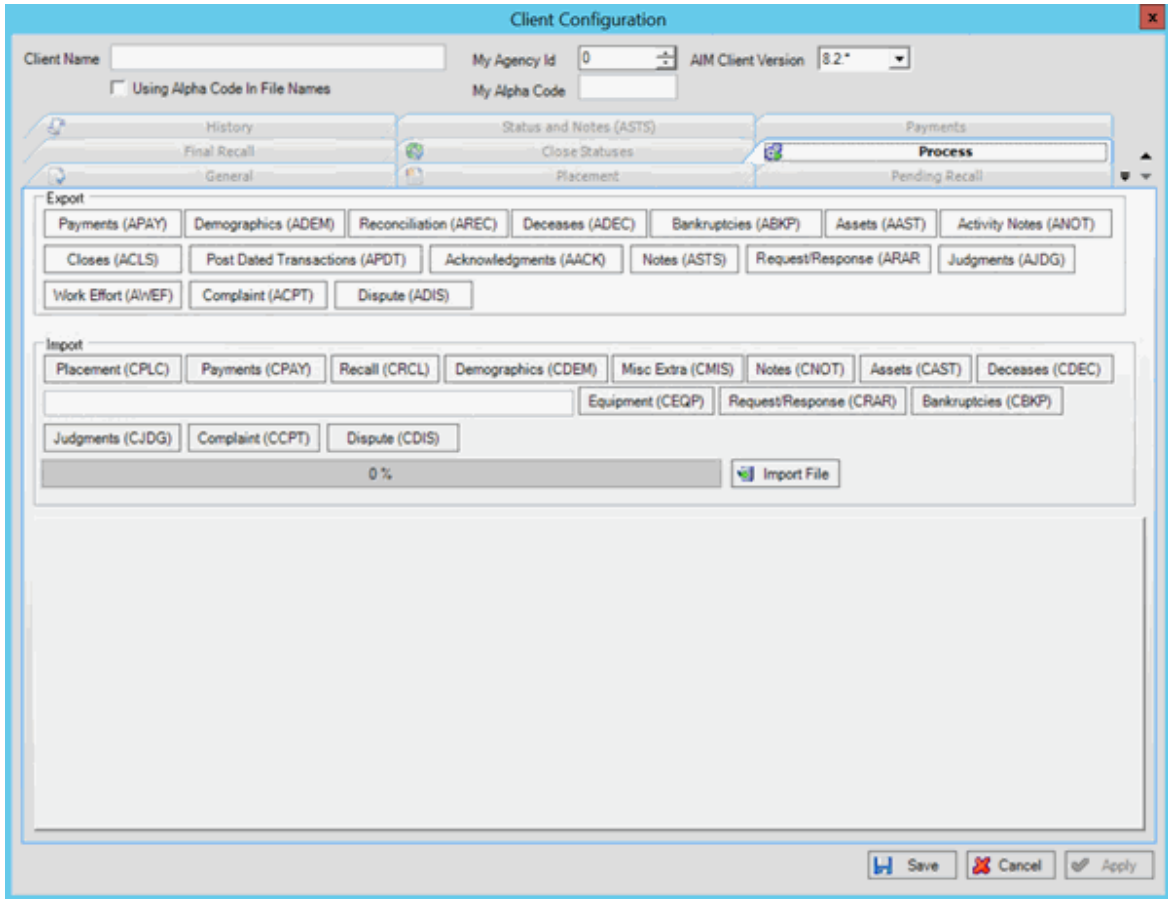
Last Received Placement Pending Recall Final Recall Payment Demographic Notes Misc Extra Data Equipment Request/Response Judgment Deceased Bankruptcy Complaint Dispute

Last Sent Recall Objection Payment Demographic Close Bankruptcy Deceased Reconciliation Request/Response Acknowledgment Asset Judgment Status/Notes Activity Notes Work Efforts

Complaint Dispute

Save Cancel Apply

2. Click the **Process** tab.



3. In the **Export** section, click **Work Effort (AWEF)**. The **Save As** dialog box appears.
4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
5. Click **OK**.