



LATITUDE SOFTWARE
AN INTERACTIVE INTELLIGENCE COMPANY

New Features for:

Release:Latitude 10.0 SU 9
Built on:02-Feb-2019

New features included in release 10.0 SU 9

The table below summarizes the new features added in this release

SCR	Description/Details
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Component: Credit Bureau Reporting

LAT-9772	<p>With the Credit Bureau Reporting Wizard the generated file or files could be picked up and sent before the processing completed. This caused an issue when an error occurred before completion of processing and the user either ignored error or didn't wait for the process to error out and then sent the files to credit reporting agencies anyway.</p> <p>The generated files are created in a temporary location and then moved to the user selected folder after completion of the entire process. We also added additional logging so that when an error occurred the generated log file could be used to view the error information.</p>
LAT-9503	<p>Minor changes around how amount past due and charge off amount are reported. Mostly only affects 1st party.</p> <p>If Bankruptcy is discharged then amountPastDue is 0.00 (regardless of industry or chargeoff).</p> <p>If Bankruptcy is petitioned and chapter 12 or 13 then amountPastDue is 0.00 (regardless of industry or chargeoff).</p> <p>If Status is not chargeoff status (64 or 97) then ChargeOffAmount is by definition 0.00.</p> <p>If status is current (11) then amountPastDue is by definition 0.00.</p>

Component: Custodian

LAT-9907	<p>Please refer to the Latitude Help File for complete details on Qlevel and Status updates regarding arrangements that take advantage of the new functionality of separate and mixed mode arrangements.</p> <p>Please refer to the Latitude Help File for complete details on Qlevel and Status updates regarding arrangements that take advantage of the new functionality of separate and mixed mode arrangements.</p>
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Component: Fusion

Change to LCI Military Scrub - the dbo.Services_LCI_MilitaryScrub ReportID

LAT-9607**has been increased to varchar15**

Change to LCI Military Scrub - the dbo.Services_LCI_MilitaryScrub ReportID has been increased to varchar15

Component: Latitude

LAT-9919

A new permission has been added to determine if the Arrangements panel will Auto-Calculate on the settlement screen and the arrangement screen. This permission is located @ Arrangements\Auto Calculate and this should default to true.

A new permission has been added to determine if the Arrangements panel will Auto-Calculate on the settlement screen and the arrangement screen. This permission is located @ Arrangements\Auto Calculate and this should default to true. For auto-calculate to be OFF which requires the user to press a button then the customer or customers have to have the policy configured and auto calculate turned off. If any customers are not configured or have auto-calculate on then the screens will auto-calculate.

LAT-9889

New Query Condition added to the Query Tool. Users will be able to add the following condition Arrangements/Needs Review.

Users will be able to add the following condition Arrangements/Needs Review. It will flag accounts with arrangements where one or more active payments are associated with a closed account.

LAT-9888

A new status and queue level has been added to help users easily identify accounts with Linked Arrangements where one or more account is not included in some payment arrangement. Update to a few queue level descriptions.

The queue level has been added to help these account queue in the collector queue. The status has also been added for added visibility and to allow the users to easily query utilizing the query tool. This status and queue level will be set by a custodian task that will evaluate arrangements for this condition daily.

019 Queue Level Description updated to Bounced Check (NSF), with PDCs pending.

LAT-9886

There is a new program (Latitude.Utilities.DataFix.exe) that will need to be run after DBUpdate so we can adjust arrangements such that they work in version SU9.

There is a new program (Latitude.Utilities.DataFix.exe) that will need to be run after DBUpdate so we can adjust arrangements such that they work in version SU9.

LAT-9882

A new feature has been added to allow the addition of payments to a non-settlement arrangement. This feature is permission based.

If configured to do so the user can add payments to an existing non-settlement arrangement. The new payments can use a different payment instruments and new accounts can be added to the arrangement if the arrangement is related to a linked account and there are accounts that are not present in a different arrangement.

LAT-9880

A new permission as been added related to the newly added Add Payments feature to an existing arrangement. This permission is located at Arrangements\Add Payments.

A new permission as been added related to the newly added Add Payments feature to an existing arrangement. If this feature is enabled then the user can add payments to an existing non-settlement arrangement.

LAT-9877	Triple the size of the comment allowed when entering a note via the work form. The max length of the comment box was 1000, it is now 3000.
LAT-9784	Log files sometimes not created by default for an application such as cbrw. The default is now to create a log file with trace level of Warning unless explicitly specified by config.
LAT-9747	Migration script to move payment, contact and payment vendor information to the new wallet table. This has been added to dbupdate as a post update script in order to support the new wallet functionality in the new arrangements panel.
LAT-9667	New Feature to allow blending multiple streams of payments into a single arrangement. This allows for advanced arrangements consisting of different frequencies, amounts and payment instruments from the new Wallet. New Feature to allow blending multiple streams of payments into a single arrangement. This allows for advanced arrangements consisting of different frequencies, amounts and payment instruments from the new Wallet.
LAT-9666	New Arrangement Panel for Multiple Arrangements New Arrangement Panel for Multiple Arrangements
LAT-9455	New Feature to distinguish Credit vs. Debit Cards and BIN lookup support New Feature to distinguish Credit vs. Debit Cards and BIN lookup support

Component: Letters

LAT-9792	Sent letters saved as rtf were consuming large amounts of space in some locations. Sent letters are now saved as pdf which will likely save well over half the amount of space, and in some cases a lot more, depending on the letter.
LAT-9702	Microsoft Word for mail merges had previously been replaced by Spire implementation. There were issues with the merging when using some macros embedded in letter templates. Added option to use Microsoft Word for mail merges. This matches previous functionality before the implementation of the Spire changes. This also fixes an issue with embedding an image in emails using Word.

Component: Payment Vendor Gateway

LAT-10016	New PVG Plugin for LucentPay - supports their 3 MID pattern New PVG Plugin for LucentPay - supports their 3 MID pattern
LAT-9895	New PVG Plugin for vendor RePay New PVG Plugin for vendor RePay
LAT-9616	New PVG Plugin for Payrazr Implements CC and ACH. NOTE: Vendor requires TLS 1.2 connections. The PVG application pool will need to be running with .NET framework 4.0. Contact support for

any questions or issues.

LAT-9609

PVG Plugin for Elavon

Implements CC and ACH. NOTE: Vendor requires TLS 1.2 connections. The PVG application pool will need to be running with .NET framework 4.0. Contact support for any questions or issues.

LAT-8832

Utility to migrate tokens from one payment vendor to another.

Given a token map file by the new vendor, this utility automates migration of those tokens for a Latitude database.

All new features from prior releases

Below is the complete description of all prior releases new features that are included in this update.

New features in release 10.0 SU 8

SCR	Description/Details
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Component: AIM

LAT-9373

Work efforts are missing in AIM.

The ability to process work effort files has been added to AIM and Receiver.

LAT-9363

AIM is missing the ability to process complaint files.

AIM has the ability to process complaint files.

Component: Credit Bureau Reporting

LAT-9503

Minor changes around how amount past due and charge off amount are reported. Mostly only affects 1st party.

If Bankruptcy is discharged then amountPastDue is 0.00 (regardless of industry or chargeoff).

If Bankruptcy is petitioned and chapter 12 or 13 then amountPastDue is 0.00 (regardless of industry or chargeoff).

If Status is not chargeoff status (64 or 97) then ChargeOffAmount is by definition 0.00.

If status is current (11) then amountPastDue is by definition 0.00.

LAT-9447

On the cbr panel, when an action is taken that requires the account to be re-evaluated, the automated evaluation call takes too long to run and disrupts the agents workflow.

On the cbr panel, when an action occurs that requires the account be evaluated, then the pending status will show as "Needs Evaluation", and the evaluation routine will not automatically run. The user will need to click the Evaluate button if they require to see the current pending status.

Component: Exchange

LAT-9020

Hid unused Exchange options

Changed 'Forms', 'Services' and 'Vendors' large buttons to very small ones at the bottom left of the interface.

- LAT-8993** **Files that are large to may lock the UI thread.**
Processing file code (parsing and then translating to the latitude schema) has been moved to a back ground thread. The UI should no longer lock and there are progress windows that are shown. These windows may not appear for long if the file is not large.
- LAT-8991** **There was not an easy way to view stored procedures configured in Exchange clients.**
You can now view the stored procedures for Exchange clients by double-clicking on the labels for each stored procedure.
- LAT-8990** **Need to provide an echo-back locating example in Exchange.**
An echo-back locating example in Exchange.has been added.

Component: Latitude

- LAT-9455** **New Feature to distinguish Credit vs. Debit Cards and BIN lookup support**
New Feature to distinguish Credit vs. Debit Cards and BIN lookup support
- LAT-9416** **Adding an NSF flag to check payments.**
Setting dbo.pdc.NSFCount to 1 when a check payment bounces.
- LAT-9344** **Enforce number of days a settlement can span.**
The user may now set Maximum number days a settlement can span, by updating the text field Maximum Days on Minimum Settlement Options.
- LAT-9343** **Monthly Pick Frequency Added.**
Users can now selected a monthly pick as a payment mode when setting up an arrangement on the arrangements wizard.
- LAT-9342** **New user warning entered when credit card expiration happens before the arrangement ends.**
User will receive a warning when entering a credit card when the expiration date is before the arrangement ends.
- LAT-9311** **Adding make up button and functionality to arrangements panel.**
User is able to make up declined/NSF Payments by clicking on make up button on the arrangements panel.
- LAT-9310** **Arrangements delete single payment functionality added.**
User are able to delete individual payments on arrangements.
- LAT-9308** **Users are able to mass replace or add payment instruments on arrangements.**
Users can access the wallet change form and are able to mass replace or add payment instruments on arrangements.
- LAT-9307** **User can create arrangements without payment instruments.**
User can create arrangements without payment instruments. Permissions to enter check/credit card information must be disabled for this feature to work.
- LAT-9306** **Added payment instrument functionality.**
User is able to change from one payment instrument (PDC, PCC) to any other payment instrument.

Component: Payment Vendor Gateway

- LAT-8832** **Utility to migrate tokens from one payment vendor to another.**
 Given a token map file by the new vendor, this utility automates migration of those tokens for a Latitude database.
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Component: TUNA

- LAT-9470** **Update to TUNA to work with TLS 1.2**
 TransUnion is forcing all connections to use TLS 1.2. This update will allow TUNA to function correctly following that change.

New features in release 10.0 SU 7

SCR	Description/Details
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Component: Credit Bureau Reporting

- LAT-9254** **The system note created during the posting process for credit reporting will now duplicate the respective notes into the cbr_audit table.**
- LAT-9192** **Replaced the cbr panel with an updated version that supports the 2017 requirements.**
 The new cbr panel is easier to use with a simplified interface that now supports the 2017 requirements for consumer reporting.
- LAT-9181** **The Cider cbr evaluation sql version is being deprecated. With the CBR 2017 required enhancements included the enhanced version will be implemented.**
 cbrEvaluateAccount and cbrEvaluateBulk will no longer be called by the Application and Custodian. A single stored procedure cbrEvaluateBulk_NoCursor will be called in its place.
- LAT-9152** **A new minimum standard has been established to expand the CRAs' capabilities to match credit data to the file of the appropriate consumer. This new minimum standard will apply to accounts reported with a Date Opened after 9/15/2017 in order for the CRAs to accept these records for processing.**
 Following the Metro 2® format, Furnishers must report:
 * Full name (First Name, Middle Name or Middle Initial (if available), Last Name and Generation Code/Suffix)
 * Address
 * Full Social Security Number
 * Date of Birth (mmddyyyy)
 * If full Social Security Number is not available, full Date of Birth (mmddyyyy) will be required
- LAT-9105**
- LAT-8867** **CBR Wizard logging added for cbr file.**
 After running the CBR Wizard the header and trailer record from the file will be recorded on sql table - cbr_metro2_file_header and cbr_metro2_file_trailer

LAT-8395

For authorized user the Date of Birth is now required to be populated with a valid date before the authorized user will report for the first time. Any authorized user with a missing date will receive an exception and will not report the first time. Subsequent attempts to report authorized user will succeed without exception regardless of valid DOB or not. Based on open date.

Ensure that every authorized user has a valid Date of Birth before reporting for the first time based on the respective open date for the account.

Component: Latitude

LAT-8961

fix for Latitude classic and related components to work correctly under mandatory and temporary profiles

this is a fix for Latitude classic and related components to work correctly under mandatory and temporary profiles

New features in release 10.0 SU 6

SCR

Description/Details

Component: AIM

LAT-8957

Adding additional logging to AIM

Added the ability to log any errors you receive on importing a file (mostly for PGP decryption errors). These errors will now be stored in the batch file history table and will be view-able in the agencies history in AIM.

Component: Credit Bureau Reporting

LAT-9037

Original Loan Amount / Highest Credit (field 12) will now be required to be a valid non zero positive value.

A new exception will be reported when the master.original value is zero or negative. The exception is "InvalidOriginalLoanAmount" and will prevent the account from reporting until resolved.

LAT-8962

Optional credit bureau reporting of compliance condition changed from one time reporting to everytime reporting.

the compliance condition code in the credit bureau report is reported for as long as it is valid.

LAT-8904

Altering Custodian configured CBR task steps to include a new procedure cbrForceDeletesByStatus.

The cbrForceDeletesByStatus procedure will determine all accounts in a status configured to report a DA/delete to the Bureaus and update the account respectively.

LAT-8828

New CBR Exception Fields

CbrException is now deprecated in the Master and debtors tables. The new field for exceptions is named CbrExceptions32.

LAT-8827

Master.CbrException and Debtors.CbrException have been deprecated and superseded by new columns named CbrException32 with an expanded integer data type.

Exception capture and reporting will now utilize two newly added columns.
Master.CbrException32 and Debtors.CbrException32

- LAT-8731** **Compiling the procedure prior to running the bulk or batch option will provide the optimum performance.**
Since the procedure may be executed for one single account or all accounts the execution plan needs to be refreshed prior to the batch run and then afterwards so that the single account execution will get the most optimum execution plan.

Component: Exchange

- LAT-9029** **The Responsible flag cannot be mapped to in Exchange for the debtors table.**
The Responsible flag can be mapped to in Exchange for the debtors table.
- LAT-8866** **You cannot map to IsAuthorized for the debtors table in Exchange.**
You can now map to IsAuthorized for the debtors table in Exchange.

Component: Fusion

- LAT-8538** **New plugin added to Fusion.**
Experian TrueTrace added as a new service featured on Fusion.

Component: Fusion - Plugin

- LAT-8762** **Updating Innovis Collection Bundle version.**
This adds the "collection score mapping" functionality. This includes additional debtor scoring and phone grading information from the vendor.

Component: Latitude

- LAT-9093** **There were not any related entities when selecting the Against Type for a complaint.**
When selecting user for the Against Type the active users will show in a dropdown. When selecting branch for the Against Type branches will show in a dropdown. When selecting department for the Against Type departments will show in the dropdown. When selecting Third Party for the Against Type will display a text box for entries.
- LAT-8902** **Compliance was missing in version 10.**
Compliance panels are now present in version 10.
- LAT-8768** **Ability to alter Projected Fees for multi-payment arrangements.**
Custom pop-up window that streamlines adjusting Projected Fees.

Component: Payment Vendor Gateway

- LAT-8832** **Utility to migrate tokens from one payment vendor to another.**
Given a token map file by the new vendor, this utility automates migration of those

tokens for a Latitude database.

New features in release 10.0 SU 5

SCR

Description/Details

Component: Credit Bureau Reporting

LAT-8827	<p>Master.CbrException and Debtors.CbrException have been deprecated and superseded by new columns named CbrException32 with an expanded integer data type.</p> <p>Exception capture and reporting will now utilize two newly added columns. Master.CbrException32 and Debtors.CbrException32</p>
LAT-8746	<p>Consolidate CBR configuration</p> <p>CBR Configuration in the Maintenance/Status Codes will be removed.</p>
LAT-8736	<p>The cbrAccountHistory function has been altered to take into account any deletes on the account that have occurred preceding the original or last initiated Dispute. When the account has last been deleted the function will return an account that is not is dispute. This will allow the account to once again be reported as a dispute provided the Agency has vetted the data.</p> <p>The cbrResetCbrPrevent procedure will need to be executed prior to the bulk evaluation in Custodian. The first run will clear the cbrPrevent flag for qualifying accounts. The evaluation will then repopulate the cbr_accounts table which would then have the compliance condition set by the second or post execution of the procedure named cbrForceDisputesByStatus.</p>
LAT-8731	<p>Compiling the procedure prior to running the bulk or batch option will provide the optimum performance.</p> <p>Since the procedure may be executed for one single account or all accounts the execution plan needs to be refreshed prior to the batch run and then afterwards so that the single account execution will get the most optimum execution plan.</p>
LAT-8686	<p>Show multiple exceptions</p> <p>Previous revision only showed one exception. Now all exceptions display.</p>
LAT-8679	<p>Configuration added to CBR Config</p> <p>New checkbox added to CBR Config that allows ability to configure whether Closed & Returned accounts are deleted. It is only visible on the top layer, which makes it a system config.</p>
LAT-8678	<p>An option has been added to cbr console allowing the configuration of the option to delete previously reported paid in full returned accounts.</p> <p>This is a system level on/off toggle which allows a paid in full account to be deleted. Called the Initialize option due to its history as a cleanup function for implementation of new clients.</p>
LAT-8677	<p>tr_master_update trigger enhanced to include logic for status updates.</p> <p>tr_master_update trigger enhanced to include logic for status updates that result in a cbrdelete or isfraud condition and will update the appropriate master row and set the specialnote column to 'DA' or 'DF' which will then be picked up by the next evaluation.</p>
LAT-8653	<p>Remove "Report" button</p>

Real-time reporting in the CBR panel has been disabled.

- LAT-8652 Delete account button should set specialnote to DA**
There is a delete account button on two forms in the CBR panel. These button actions need to be updated to set master.specialnote to "DA"
- LAT-8651 Removed unused status codes. LAT-8754 Build further on this by replacing the dropdown with buttons.**
In the admin account form, the status dropdown now only contains two choices -- DA and DF
- LAT-8649 Clarify CBR "Enabled" checkbox**
When configuring customer credit reporting, there is a checkbox which reads "Enable". In order to add clarity, this checkbox now reads "Reporting Enabled".
- LAT-8648 Remove "Always use customer credit bureau settings, if assigned" option.**
In the CBR Console, the option for "Always use customer credit bureau settings, if assigned" is not used by backend process, so it has been removed from UI.
- LAT-8645 Removed obsolete CBR configuration fields**
There are configuration options which are no longer relevant for statuses as the reporting conditions are now driven by root data.
All configuration columns have been removed with the exception of "Report", "PIF" and "SIF".
- LAT-8644 CBR Wizard can create test file**
My indicating in the CBR Wizard that a test file is to be created, customers can rerun the CBR report without altering history. The test file cannot be submitted to a bureau.

Component: Fusion - Plugin

- LAT-8762 Updating Innovis Collection Bundle version.**
This adds the "collection score mapping" functionality. This includes additional debtor scoring and phone grading information from the vendor.

Component: Latitude

- LAT-8768 Ability to alter Projected Fees for multi-payment arrangements.**
Custom pop-up window that streamlines adjusting Projected Fees.
- LAT-8754 Remove and replace Account Status dropdown**
The Account Status dropdown has been removed and replaced with an uneditable textbox. Additionally, there will be two buttons added that allow the user to place the account in DF or DA status.
- LAT-8615 Could not read long extra data values after lengthening field to 128 chars.**
Add the extradata value to the tooltip
- LAT-8580 Added Separate Direct invoice type**
The new Separate Direct type will creates 2 separate invoices, one for direct payments and the other is for everything else. The direct payments invoice is always gross and

the other is whatever the customer setting is for invoice method.

- LAT-8489** **Updating the 8.3 database upgrade script for cbr.**
This upgrade script is currently for any latitude version prior to CIDER SU03.
- LAT-8429** **Added option to pay oldest A/R first to Invoices application**
In the Invoices applications options dialog, there is a new checkbox for paying the oldest A/R first. If selected then monies owed client will be applied towards oldest invoice A/R.
- LAT-8421** **The file format .docx will now be supported in letter console for mail merging.**
The file format .docx will now be supported in letter console for mail merging.
- LAT-8368** **Parent Basic Invoice report did not display due us/you calculations nor did it sort properly nor did it display taxes.**
Parent Basic Invoice now looks and behaves similar to the Basic Invoice report but includes the additional grouping and subtotals expected in Parent.
- LAT-8329** **Added features:**
- SMTP to e-mail after letters are requested from Letter File Writer
- SFTP option to send file to SFTP server after Letter File Writer
Must copy WinSCP.exe and WinSCPnet.dll into \bin dir after ES install. Review LetterFile.exe.config to set correct settings for SMTP and SFTP.
- LAT-8295** **New Word Merge fields are added to comply with New York Regulations.**
New Word Merge fields added for New York State regulations compliance. Also, new panel is available for quick reference of values.
- LAT-8163** **J1 section added to Metro2**
In order to comply with the Metro2 credit reporting standard, J1 section has been added to credit report file.

Component: Payment Vendor Gateway

- LAT-8524** **The Transaction ID of principal transactions is now noted on surcharge transactions**
transactions marked as Principal have their succeed Transaction ID value temporarily stored, and follow-up transactions marked as Surcharge, for the same ScheduledPayment have the Reference include that Transaction ID value.
- LAT-8404** **The Transaction ID (Ref Num) of principal transactions is now noted on surcharge transactions**
transactions marked as Principal have their succeed RefNum value temporarily stored, and follow-up transactions marked as Surcharge, for the same ScheduledPayment have the Description include the RefNum value.
- LAT-8371** **Billing Tree PVG plugin did not support a different set of pin and securityToken values for a separate surcharge transaction.**
For Billing Tree we now support a second set of credentials for the surcharge transaction. There are new requirements for the vendor information strings.

New features in release 10.0 SU 4

SCR	Description/Details
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Component: AIM

LAT-3909	<p>Allow configuration of FTP and SFTP settings.</p> <p>Added ability to configure FTP and SFTP settings using the AgencyInterfaceManager.exe.config file.</p>
LAT-3892	<p>Added the ability to adjust field lengths for delimited files.</p> <p>Added the ability to ensure that string fields in delimited export files don't exceed the specified length in the layout.</p>
LAT-3839	<p>Added the ability to set the passive mode for FTP providers at the global and agency level.</p> <p>Added the FTP Passive Mode check box to the General tab of the Options window. Added the Passive Mode check box to the General tab of the Agencies/Attorneys pane.</p>

Component: Dialers

LAT-7751	<p>interface update to support new message types</p> <p>* new events *</p> <p>MaskRecording - received from Latitude to indicate recordings should be paused or resumed</p> <p>CustomDialerFunction - received from Latitude for custom or adhoc commands or messages (used for markup and recording lists)</p> <p>* methods *</p> <p>CallReceived gets new argument Callkey (with overloads for compatibility)</p> <p>* new methods *</p> <p>CustomLatitudeFunction - send to Latitude for custom or adhoc commands or messages (used for recording lists)</p>
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Component: Exchange

LAT-8085	<p>C# file pre-processing scripts are now compiled using the .NET 3.5 framework.</p> <p>C# file pre-processing scripts are now compiled using the .NET 3.5 framework. The assemblies that can be referenced are: mscorlib.dll, System.dll, System.Data.dll, System.Xml.dll, System.Core.dll, System.Xml.Linq.dll, System.Data.DataSetExtensions.dll, GSSI.Latitude.Library.dll and GSS.Common.dll.</p>
LAT-8083	<p>The ability to add a post C# script has been added to the Visual Exports in Exchange.</p> <p>The ability to add a post C# script has been added to the Visual Exports in Exchange. This uses the .NET 3.5 framework and allows the modification of the initial file created and the possibility of returning more than the given file.</p>
LAT-8042	<p>Pre and Post file stored procedures in Exchange imports do not do anything other than log errors when one is encountered running these procs. These need to be seen as errors in the Import Process.</p> <p>Pre and Post file stored procedures in Exchange imports are now seen as errors when an exception is encountered when the proc is executed.</p>

- LAT-3908** **Add feature to allow users to export to a Reader instead of retrieving data from the database and storing it in data tables.**
- When exporting files, you can select to use a Simple Reader. This export type doesn't use as much memory as the Standard export type. The limitations are:
1. You cannot export to an Excel file.
 2. You cannot have detail groups.
 3. You cannot relate detail records together in a parent-child relationship.

Component: Fusion - Plugin

- LAT-8209** **Adding Transunion TLO Fusion plugin**
Includes new Fusion plugin for Transunion TLO.
- LAT-3912** **Add configuration options for phone types and statuses that users can specify when running the plugin.**
Users can select the phone types and statuses on the Permission Policy Settings page.

Component: Latitude

- LAT-8409** **Send email with results of Letter Writer with counts by letter code.**
Request for itemized list of letter codes in letter file writer's e-mail body
- LAT-8389** **Upgrade of MSXML to supported version.**
Upgraded MSXML 4.0 to MSXML 6.0 to get on the supported version.
- LAT-8329** **Added features:**
- SMTP to e-mail after letters are requested from Letter File Writer
- SFTP option to send file to SFTP server after Letter File Writer
 Must copy WinSCP.exe and WinSCPnet.dll into \bin dir after ES install. Review LetterFile.exe.config to set correct settings for SMTP and SFTP.
- LAT-8295** **New Word Merge fields are added to comply with New York Regulations.**
New Word Merge fields added for New York State regulations compliance. Also, new panel is available for quick reference of values.
- LAT-8215** **The Reporting Console now respects the print orientation of a report over the print orientation of the default printer in the event that the report is sent straight to the printer, bypassing any preview mechanism.**
The example that particularly brought this to light was sending invoices straight to the printer. The summary reports were landscape but were printing in portrait as per the default settings of the printer on the host machine.
- LAT-8163** **J1 section added to Metro2**
In order to comply with the Metro2 credit reporting standard, J1 section has been added to credit report file.
- LAT-8151** **Customer reported issue with CBR Panel. Next or pending reporting status was not correctly calculated.**
This update adds an audit entry to cbr_accounts for disputed accounts that will be repeated for each evaluation.

Credit reporting enhancements.

ISSUE RAISED DURING USER GROUP:

1) Minimum Balance Exclusion

- The minimum balance required for reporting is currently compared against the original principal bucket on the account
- Altering the test to use the current balance

2) Adding audit entry for cbr exception

- When an account or debtor is excluded from reporting due to a cbr exception the respective account is removed from the pending file and added to the excluded file.
- An entry will be added to cbr_audit when this occurs.

LAT-8137

Collection Agencies and Debt Buyers

Report a full file monthly

Do not report Medical Debt collection accounts less than 180 days old

Report the name of the Original Creditor and Creditor Classification

Adding function to acquire phones from the phones_master table.

Adding report exceptions view and function to detail evaluation errors

- The new minimum balance test is a one time occurrence which will filter the account on current principal and the configured minimum balance allowed
- Once reported the account will continue to report until finalized
- The test will not cause the account to be excluded once reported

- An entry written to cbr_audit when this occurs has been added and will allow the current pending status to be viewed.

Added constraint requiring Original Creditor Name and the valid Creditor Classification Code according to the Metro 2® format. These fields are required for each account or item reported.

Added constraint to prevent the reporting of Medical Debt collection accounts (as defined by Creditor Classification Code 02) until they are at least 180 days past the Date of First Delinquency.

Added phones_master table function to cbrdatafx()

Added cbrDataExceptionDtl() function for detailed debtor exceptions

LAT-8096

Adjustments to POD accounts was disallowed previously and is not allowed.
removed check for POD adjustment.

LAT-8057

Need ability to ignore errors and continue processing.

Added attribute /e to command prompt list to ignore errors and continue processing

LAT-7808

Adding the console-ability to the act document attacher.

- "-locateaccountsby": Locate Accounts By
- "-directorytoscan": Directory To Scan
- "-regularexpression": Regular Expression
- "-domovedocumentlocation": Do Move Attached Documents
- "-errorlogdirectory": Error Log Directory
- "-attachArchDir": Attachment Archive Directory
- "-dosearchsubdirs": Search Sub Folders?
- "-doesregexcontaincat": Does Contain Category Exp Locator?

"-docopydirstructure" : Copy Directory Structure?
 "-dogeneratethumbnails": Do Generate Thumbnails?

"-dbserver": Db Data Source
 "-dbcatalog": Db Initial Catalog
 "-dbuser": Db UserName
 "-dbpass": Db Password

"-latitudeusername": Latitude UserName
 "-latitudepassword": Latitude Password

- LAT-7714** **Allows Dashboard Data Sources to Pull Data From More Than 1 Database**
 Allows Dashboard Data Sources to Pull Data From More Than 1 Database
- LAT-7305** **Added the alloc% field to fee schedule**
 Added the ability to set a percentage of the payment remaining to be allocated towards a particular bucket.
- LAT-3945** **LetterRequest.DocumentData consuming extensive disk space due to scaling issue with images in letter templates.**
 Changed datatype to varbinary (max) for LetterRequest.DocumentData and placed a constraint on the column size to prevent storing unscaled large letter templates and images in the database. Also limited the image size to 100 KB.

Component: Payment Vendor Gateway

- LAT-8404** **The Transaction ID (Ref Num) of principal transactions is now noted on surcharge transactions**
 transactions marked as Principal have their succeed RefNum value temporarily stored, and follow-up transactions marked as Surcharge, for the same ScheduledPayment have the Description include the RefNum value.
- LAT-8371** **Billing Tree PVG plugin did not support a different set of pin and securityToken values for a separate surcharge transaction.**
 For Billing Tree we now support a second set of credentials for the surcharge transaction. There are new requirements for the vendor information strings.
- LAT-8272** **Add offset option to NACHA files**
 Added Parameter fields:
 include_offset 1 bool set to "Y" to include offset row. No value to not include offset row.
 fein 14 Company Id for offset row.
 name 22 Name to assign to offset row. Default "OFFSET"
 Sample Param:
 Vendor Info Param1:
 fileformat=NACHA|immdest=0810810818|immorig=0910910919|immdestnm=FELLS
 NARGO|immorignm=FAKEIE
 RECOVERY|cname=FRC|dfiid=08108108|companyid=1867530955|incoffset=Y|fein=41424344|name=OFFSET
- LAT-8176** **In order to give the option for an OFFSET record, the NACHA export tool has been modified to allow a Vendor Parameter switch to insert offset row.**
 Added Parameter fields:
 include_offset 1 bool set to "Y" to include offset row. No value to not include offset row.
 fein 14 Company Id for offset row.
 name 22 Name to assign to offset row. Default "OFFSET"

Sample Param:

Vendor Info Param1:

fileformat=NACHA|immdest=0810810818|immorig=0910910919|immdestnm=FELLS

NARGO|immorignm=FAKEIE

RECOVERY|cname=FRC|dfiid=08108108|companyid=1867530955|incoffset=Y|fein=41424344|name=OFFSET

Component: Web Access

LAT-7648 **Web Access, add Account View link to Status report.**
Clicking on the account of filenumber will both result in the display of account view.

New features in release 10.0 SU 3

SCR	Description/Details
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Component: Dialers

LAT-6977 **There is no easy way to match a dialer call to the note that the system adds to Latitude for the call disposition.**
When the system adds a note to Latitude for dialer calls that the dialer handles or that an agent takes and then dispositions, a relationship between the dialer call and the note is created in the notes_referenced table.

LAT-6264 **System doesn't support the Noble Hosted Dialer.**
Made changes to the Dialer Update Service and Noble Relay Agent to support the Noble Hosted Dialer.

Component: Exchange

LAT-7023 **Need to ability to add records to generic tables regardless of account context.**
New Business, Maintenance, Financial and Final Recall Import processes can now be configured to add records to generic tables regardless of existing account context.

LAT-7015 **Exchange needs the ability to map to more than one paid bucket for adjustments.**
When creating adjustments in Exchange, you can now map the Paid1 through Paid10 buckets.

LAT-6767 **If any Exchange files that are imported using Job Manager are blank, no history record is created in Exchange to document that the blank file was imported.**
A history record is created in Exchange when a blank file is imported using Job Manager.

Component: Fusion - Plugin

LAT-7206 **New Fusion Plug-in added for CCC.PhoneScrub vendor service added.**
New Fusion Plug-in added for CCC.PhoneScrub vendor service added.

LCI Bankruptcy Fusion plug-in isn't processing bankruptcies fully. It inserts

LAT-7088**the record to a services table and the user has to take further action.**

The plug-in now functions like the LexisNexis bankruptcy plug-in in the way it updates and inserts bankruptcies and attorneys.

Component: Latitude

LAT-7535**Added 2 columns to the Linked Accounts data grid on the Links tab in the Payment Entry window.**

Added "judgment date" and "case number" to the Linked Accounts data grid on the Links tab in the Payment Entry window.

LAT-7495**Need the ability to show or hide columns in the Linked Accounts data grid on the Links tab in the Payment Entry window, and arrange their order.**

Added a Customize dialog box, which allows you to indicate which columns to show or hide in the data grid. It also allows you to specify whether to apply the changes to the current session only, or future sessions.

LAT-7318**Don't allow the reversal of fees that have a zero dollar amount.**

In the Payment Entry window, users can no longer reverse fees that have a zero dollar amount.

LAT-7317**If an account has fees and no debtor payments, an invoice isn't created because there are no debtor payments.**

Invoices are now created for accounts that have fees but no debtor payments.

LAT-7069**Users can unlink accounts that are part of an active payment arrangement.**

If a linked account is part of an active payment arrangement, users can no longer unlink the account.

LAT-6758**Customer requires special handling for phone numbers with a "Do not use" or "Cease and Desist" status, and for accounts that go into a bankruptcy status.**

Functionality was added to flag phone numbers as bad with they have a "Do not use" or "Cease and Desist" status, or when the account goes into a bankruptcy status.

LAT-6706**Add functionality so that Liquid Latitude and Dashboard can share a single sign-on.**

Liquid Latitude and Dashboard can now share a single sign-on.

LAT-6660**The Champion Challenger program was added to the Latitude install.**

The Champion Challenger program was added to the Latitude install.

Component: Payment Vendor Gateway

LAT-7151**An update is needed to the existing Clear Comm PVG plug-in to add a field to identify the Latitude customer.**

This release populates the request field 'EXTMerchClient' with the Latitude Customer.

LAT-7148**Need a Payment Vendor Gateway (PVG) plug-in for Chase Payment Tech to process credit card payments.**

This component enables Latitude (Payment Vendor Gateway) to communicate with the Chase Payment Tech payment processor.

- LAT-7050** **Need a Payment Vendor Gateway (PVG) plug-in for Clear Payment Solutions.**
Clear Payment Solutions PVG plug-in was added.
- LAT-6772** **Need a Payment Vendor Gateway (PCG) plug-in for ClearComm.**
Added a PVG plug-in for ClearComm.

Component: Web Access

- LAT-7364** **WebAccess File Transfers**
Added the capability to upload and download files to predetermined folders on the web server, as well as listing files that have previously been uploaded or are available for download, and to track files that have been uploaded or downloaded (Who, What, When), and provide email notification to Agency staff upon upload/download of a file.

New features in release 10.0 SU 2

SCR	Description/Details
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Component: Install

- LAT-6473** **This adds PVGConverter.exe to the install.**
- LAT-5517** **This adds NetGenderAddressWrapper.dll to the core install.**

Component: Job Manager

- LAT-5952** **A SFTP configuration will now use the port number configured via Job Manager.**
Establishing a port number to use for SFTP via the configuration in Job Manager does not work. It always defaults to port 22.

Component: Latitude

- LAT-6796** **Special phone status handling**
Special phone status handling
- LAT-6582** **Migrate arrangements api to v.10.**
This adds the enhanced ability to modify the arrangement wizard.
Add Extension Fee to the Payment Calculation page of Arrangement Wizard.
Add permission to turn off the recalculation of due dates when they fall on weekend or holiday.
- LAT-5464** **Changed internal build process to show version number changes on manual database builds like ES generations.**
Changed internal build process to show version number changes on manual database builds like ES generations.

Active past due statuses are now allowed for First party charge-offs that

- LAT-5290** **entered bankruptcy processing prior to being charged off will be allowed this functionality.**
- Allow 1st party charge offs to be placed with active past due statuses ('11','71', '78', '80', '82', '83', '84'). These statuses will be loaded by the Client Bridge and are the responsibility of the Client. MasterChargeOff will be used to load the respective statuses. Only accounts that entered bankruptcy prior to charge off will be loaded with the respective statuses. If the bankruptcy is dismissed the status would be changed to 97 (Charge OFF) by the evaluation process. Every charged off account is considered closed and should also be loaded with a respective close date and the accompanying payment history profile with code "L" denoting charge off. PortfolioIndicator, SoldToPurchaedFrom and PaymentRating will be added to the cbr_accounts table to facilitate reporting of sold accounts. Status code "05" will be used for this purpose.
- Manual overrides will not be allowed for the additional statuses. Last Payment date will be determined from payhistory.DatePaid as opposed to the current method using payhistory.entered.
- Date of account information (billing date) will be defaulted to the run date for the wizard and will be set in the GetNextMetro2Batch procedure. Billing Date on cbr_accounts will continue to be set when the account is updated. Discharged bankruptcies will result in the account balance and past due amount set to zero. It will be up to the Client to delete the account via status update or return.
- LAT-4765** **Added K2 segment to the CBR wizard output. Added Account Statuses '11', '71', '78', '80', '82', '83', '84' to CBR panel.**
- LAT-4696** **Dbupdate application was modified to use the latest RedGate DLL's which support SQL server 2012 syntax.**
- Dbupdate application was modified to use the latest RedGate DLL's which support SQL server 2012 syntax.
- LAT-4326** **New feature: create standalone application and Net Panel plugin to facilitate tabulating insurance carrier document's and other attributes.**
- New feature: create standalone application and Net Panel plugin to facilitate tabulating insurance carrier document's and other attributes.

New features in release 10.0 SU 1

SCR	Description/Details
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