Feedback

Latitude® by Genesys

Printable Help for Users Administrators

Version 2024 R1

Last updated May 20, 2024

Abstract

This document is a printable version of Latitude by Genesys help for users administrators.

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

Latitude by Genesys

Feedback

Introduction to Latitude

The Latitude collections solution has comprehensive debt collection and recovery capabilities for managing all pre- and post-charge-off accounts and workflow processes. It provides collectors and agents with the tools to manage the debt collection and recovery process. It also provides supervisors, managers, administrators, and support staff with the tools to manage Latitude.

Latitude provides the full functionality for the collector's or agent's desktop and deploys as a true zero-footprint, browser-based environment.

Latitude allows you to:

- Maintain account and contact information.
- Track account activities.
- Record account notes.
- Set account reminders and follow-up dates.
- Schedule and process payments.

Related Topics

What's New in Latitude

Log On to Latitude

Change Your Password

Work Form Overview

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What's New in Latitude

For more information about the changes and enhancements in Latitude, see the following:

2024R1

Documentation Handling For AIM

- AIM and AIM Receiver have been enhanced in the newest file format to support the sending of documentation as a supplemental file during placement or when sending request and response updates to agencies.
- Documents to be sent can based upon the document type definitions in Latitude and will be transmitted in a compressed (ZIP) file of a new file type of “CDOC.” New records in the placement and request and response files indicate if a documentation file is included.

License Management

- License management for Latitude has been enhanced to utilize a license key system for both concurrent seat licenses and licensed individual products. Key management supports both subscription (Premise or Cloud subscription) and legacy perpetual licenses.
- The administration page for Latitude now includes “License Management,” which will display currently active licenses in addition to any expired licenses and provide the mechanism to import a new license key.
- Any existing customers who upgrade to this version or later releases who have not already obtained a license key must do so before the upgrade.

Centralized Event Logging

- Centralized system event logging has been enhanced to include events generated by all Latitude applications and now provides the ability to filter events by date range.
- Applications that now generate System Events for Add/Change/Delete activities or generation of files include:
- AIM, CBR Console, CBR Wizard, Custom Queue Manager, Exchange, Letter Console, Link Console, List Builder, Job Manager, Pool Queue Manager, and Workflow.

Account Creation via Manual Entry or Rest API

- Enhancement allows for manually creating an account in Latitude directly from the Agent Desktop. A new permission has been added at the System, Role, and Scope levels to enable or disable the ability to add accounts. Default behaviour does not permit manual account creation.
- A new public Rest API has been added that allows for the creation of accounts directly from other systems. The existing Rest API can be utilized to populate more data on the newly created account.

2023 R1

Script Builder for System Level Queries

- Provide the ability to create queries managed at the system level and not owned by a specific user.
- Scripting tool requires system level queries for conditional scripts.
- Merge fields in scripts needs to use system level query results.
- Custom panel mapping requires system level queries for panel content.
- Removed the script query designer from the scripting tool.
- Deleting or changing a system level query does check usage of the query in other tools and applications.
- Digital communication templates needs to use system level query results as merge fields not standard mail merge fields.

Policies and Permissions

- **A**dded system level queries permission, For more information, see Create System level Queries Permission.
- Query tool observes permission when user attempts to save a query.
- Users with permission may save new or modified system level queries.
- All tools that use Query tool now support system level queries and policy.

Digital Communications Enhancements

- Enhanced existing email functionality to support outbound attachments of documents and ability to leverage Genesys Cloud for outbound and inbound email communications.

Policies and Permissions

- Ability to attach documents to outbound email now be controlled by a new permission.
- Based on permission, User may either attach an existing document on the account & generate a pdf of a standard letter or attach an external file.

2022 R2

2022 R2 introduced the following changes and enhancements in Latitude.

Customer Facing Self-Portal

- This includes self-service options that allow customers to do-it-yourself to make their payments, view their account details/history, and update personal/demographic data. Customer can manage their debt on their own, using the portal. A customer self-service portal doesn't require an agent to intervene, hence, creating a more seamless experience for the consumer.

Localization Capability for Browser UI

- This provides localization support for browser-based applications including Agent Desktop, and Agent Scripting.

UX / General Functionality Enhancements

- Improve the general user experience within the browser-based components of Liquid. This includes providing a mechanism to request an SMS/Email from the context menus and provides a display of add/edit capability in the Customer Task panel for addresses and emails.

2022 R1

2022 R1 introduced the following changes and enhancements in Latitude.

Genesys Cloud integration

- **New capabilities added to Genesys Cloud integration.**
  - Fetching non-agent calls into the communication panel.
  - Screen pop-up upon inbound call received.
  - Remove phone numbers from current contact list/campaigns

Digital Communication (SMS and Email)

- Added ability to send outbound SMS from Communication, phones panels and from workflow.
- Added ability to send Email while sending letters, from Communication & Email panels and from workflow.
- Added ability to increment attempts/contacts on phone number/Email in Compliance panel incremented upon SMS/Email delivered successfully depending upon the configuration.
- Added ability to set the Phone number/Email as bad upon SMS/Email delivery failure depending upon the configuration.
- Inbound SMS/Email is fetched and displayed in Communication panel.
- Attachments from inbound emails are saved and displayed in the Communication panel.

- Added ability to handle any opt-out from receiving SMS/Email and unsubscribe the respective debtor from further SMS/Email communication respectively.

- New events are added to events panel at appropriate operations while sending, reading, delivery status, etc. for SMS & Email

Payment Arrangements & Wallet

- New events are added to events panel at appropriate operations while sending, reading, delivery status, etc. for SMS & Email.

- Payment Vendor Plugins can be configured in Client scope as well.

- User can calculate and update the interest deferral if the interest deferral flag in master is set to true.

- Surcharge Type Policy has been created under Financial in Administration. It allows adding, updating, and deleting new surcharge types. And these surcharge types are displayed in a drop-down for surcharge calculation in the arrangements.

- A new table bin_list is created and contains the BIN numbers used to compare with the card number that is being entered while saving into the wallet and the type to compare with the card type of the item being added.

- Added an option to edit the address for an existing wallet item.

- Surcharge for payment methods is set as surcharge percentage, which takes the same flat amount as a percentage. If the Surcharge Percent checkbox is checked. The surcharge will be considered as a percent and will be shown as % in the arrangement Window

- Added a new option to view Business Rules while setting up an arrangement. Users can view the Business Rules in the arrangement panel to view a summary of payment arrangement permissions set for their user role and the customer on the account.

- Provided an ability to establish different business rules when setting up an arrangement based upon the payment method being used (Card, ACH, Promise).

- Added request-specific SIF or PIF Letter be generated when setting up a payment arrangement.

- Added a posting note within the Arrangements task

Reference Panels

- Added a table named dbo.HistoricalTransactions and Reference panel to show the data from dbo.HistoricalTransactions.

System codes and settings

- **A new letter configuration called Communication Templates has been created to configure if a letter code can be sent as a letter, email, or SMS.**
    - A designer to create email/SMS is added for the user to create templates.
    - A list of merge fields is provided to inject any data from Latitude while rendering the templates.
- **Added the customer groups under System Codes & Settings in Administration.**
    - In the Navigation pane, click System Codes and Settings > Customer Groups > Custom Customer Groups.
    - Use the Custom Customer Groups dialog box to add, modify, and delete Customer Groups.

      Fields and the description of customer group dialogue.

      Name: Custom Customer Group name.

Description: Description of the Custom Customer Group **.**

Display Group in Invoice application: If selected the Custom Customer Group is added in Invoice application.

Display Group on Statistics Console: If selected the Custom Customer Group is added on Statistics console.

Client: Select the clients, which must be part of the current custom-customer group.

Policies and Permissions

- **New permissions have been created under Digital Communication > SMS, which is used when sending SMS to debtors**
    - Gateway configuration defined at System & Client Scope. The plugin used to send and receive SMS is configured here. Each plugin setting must be separated by a new line. There's also inbuilt support to integrate other vendor plugins. Genesys Cloud SMS plugin is built into the system.
    - Allow sending SMS – System, Client, Role & User Scopes. SMS is sent only if this is enabled.
    - Consider SMS as Attempt **–** System level. This is also added as a new option under State Restriction setting. Update State Restriction setting documentation accordingly. Sending an SMS is considered as an attempt and the number of attempts in the Compliance panel are incremented if this is enabled.
    - Consider SMS as Contact – System level. This is also added as a new option under State Restriction setting. Update State Restriction setting documentation accordingly. Sending an SMS is considered as a contact and the number of contacts in the Compliance panel are incremented if this is enabled.
    - Consider SMS as Worked – System, Client. Sending an SMS is considered as worked if this is enabled.
    - Consider SMS as Bad – System, Client. Phone number is updated as Bad on delivery failure if this is enabled.
- **New permissions have been created under Digital Communication > Email, which is used when sending emails to debtors**
    - Gateway configuration defined at System & Client Scope. Plugin used to send and receive emails is configured here. SMTP, IMAP is the recommended plugin. Each plugin setting must be separated by a new line. There's also inbuilt support to integrate other vendor plugins.
    - Allow sending Email – System, Client, Role & User Scopes. Email is sent only if this is enabled.
    - Consider Email as Attempt – System level. This is also added as a new option under the State Restriction setting. Update State Restriction setting documentation accordingly. Sending an email is considered as an attempt and the number of attempts in the Compliance panel are incremented if this is enabled.
    - Consider Email as Contact – System level. This is also added as a new option under the State Restriction set. Update State Restriction setting documentation accordingly. Sending an email is considered as a contact and the number of contacts in the Compliance panel is incremented if this is enabled.
    - Consider Email as Worked – System, Client. Sending an email is considered as worked if this is enabled.
    - Consider Email as Bad – System, Client. Email address is updated as Bad on delivery failure if this is enabled.
    - Allow Attachments - System level. If allow attachment enabled, must specify file share to house attachments.
- **Added a new policy under WebAccess** → Website User Policy as 'User Can Upload and Download files to the web Server' where users can save upload location and download location for files.

- A new policy named “Restrict Card Payments to Debit Cards Only” is added to restrict card types to only debit type cards at the System/Line of Business/Client scope. The policy would go under the "Credit Card" subtype folder under Scheduled Payments > Business Rules.

Letters

- Added an ability to change the number of days prior to the due date of the payment for the Promise Letter to be sent.

Search

- Added missing search fields to the Default Quick Search options in Agent Desktop**.**

Login

- Provided an option to connect to different databases from Web UI.

2021 R1

2021 R1 introduced the following changes and enhancements in Latitude.

Permissions

- Added Compliance Settings for the following:
    - Credit Bureau Reporting
    - Validation Notice Tracking
    - Call Attempts and Conversations Limits
- Added Script Builder Permission for specifying whether users can create and update Agent.

Reference panels

- Added ability to add notes in Events Panel for an account. For more information, see Add Note.
- Added ability to view attempts/conversations, validation notice details, itemization details, and preferred time to call details as part of compliance panel. For more information, see Compliance.
- Added ability to apply preferences/restrictions to phone numbers. For more information, see Modify an Account Phone Number.

System Codes and Settings

- Added ability to add, modify, and delete holiday calendar. For more information, see Holidays.
- Added ability to modify date and phone number using the localization code. For more information, see Localization.

Script Builder

- Added ability to create and modify Script Query. For more information, see Script Builder.
- Added ability to create, modify, copy, group, delete Script Query Conditions. For more information, see Script Query Conditions.
- Added ability to create, modify, delete, and view history of Scripts. For more information, see Scripts.

Arrangements

- Added ability to prevent adding expired credit card, address validation. For more information, see Add a Credit Card.

Payments

- Added ability to decline payments for repay when the information provided is incorrect. For more information, see Process a Payment.

Compliance

- Added ability to send validation notice digitally and through physical letters. For more information, see Validation Notice.
- Added ability to view the conversations held. For more information, see View Contact Made.

Warnings

- Added ability to view validation status warnings for an account. For more information, see View Warnings.

Mail Return

- Added ability to manage mail return. For more information, see Manage Mail Return.

2020 R1

2020 R1 introduced the following changes and enhancements in Latitude.

Permissions

- Added Allow RDN Case Creation and Updates permission for specifying whether users can create and update RDN collateral recovery cases on the RDN Integration panel.
- Added Allow Collateral Editing Permission for specifying whether users can modify automotive and non-automotive collateral information on the Collateral panel.

- Added Manual Dial Policy to Dialer Permission to allow users to place calls manually through the Genesys Cloud client. (For Genesys Cloud integrations only.)
- Added Phone Type Mapping Permission for mapping phone types to action codes.
- Added RDN Service Configuration for specifying the URL and API key for retrieving RDN collateral recovery case updates.

Genesys Cloud integration

Ah Genesys Cloud for Dialer capabilities that allow collectors to process campaign calls based on call lists that your organization creates using List Builder. For more information, see **Latitude Integration with Genesys Cloud**.

Reference panels

- Added ability to maintain automotive and non-automotive collateral information for an account. For more information, see Collateral**.**

  : 'Added ability to open a web page inside a custom reference panel and display mapped content within the web page. For more information, see Add a Custom Anchor Card or Reference Panel.

  Note: This panel replaces the Automotive panel.

  2. Added ability to open a web page inside a custom reference panel and display mapped content within the web page. For more information, see Add a Custom Anchor Card or Reference Panel.

Note: This panel replaces the Automotive panel.

- Added ability to open a web page inside a custom reference panel and display mapped content within the web page. For more information, see Add a Custom Anchor Card or Reference Panel.

System codes and settings

- Added ability to specify a user's credentials for a third-party system to log on the user to the third-party system automatically. For more information, see **Add a User** and

  Added user-defined list codes for the following:

  - Bankruptcy Reaffirm Method
  - Bankruptcy Status
  - Bankruptcy Surrender Method
  - Prefix
  - Suffix

For more information, see **List Codes**.

Task panels

Added ability to create and update RDN collateral recovery cases. For more information, see **RDN Integration**.

2020 R2

2020 R2 introduced the following changes and enhancements in Latitude.

Account Analysis

Added ability to create queries to retrieve accounts that meet specific criteria. Also, allows you to sort, group, and summarize the information for review. For more information about account analysis, see **Account Analysis**.

Permissions

- Added Access Account Analysis Permission for specifying whether users can create and update Account Analysis Query.
- Added User Restrictions by Conditions Permission to restrict the accounts that the user can modify using Account Analysis.

Account Reactivation

Added ability to reinstate an account and unreturn an account. For more information about reinstate and unreturn, see Reinstate an Account and Unreturn an Account.

Permissions

- Added Access Reopen Account Permission for reinstate an account.
- Added Access Unreturn Account Permission for unreturn an account.
- Added Email Request Permission for email a letter.
- Added Print Request Permission for print a letter.
- Added SMTP Permission for email messages.
- Added Bankruptcy Permission for modify or delete bankruptcy data.
- Added Deceased Permission for modify or delete deceased data.
- Added My Desk Assignment Permission for reassign an account to desk.

Task panels

- Added ability to email a letter. For more information, see Email a Letter.
- Added ability to print a letter. For more information, see Print a Letter.

Related Topics

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Log On to Latitude

Change Your Password

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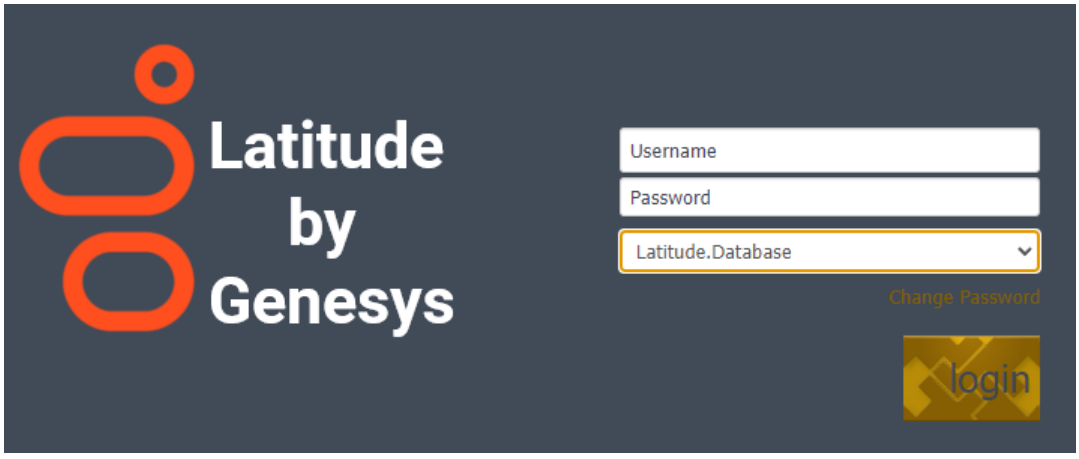
Log On to Latitude

Use the **Logon** page to log on to Latitude. Your assigned permissions determine which options and features in Latitude are available to you. For more information, see Permissions and Policies.

To log on to Latitude

1. Open Latitude in your browser. The **Latitude by Genesys Logon** page appears.



2. Do one of the following:

   - If you have a user ID and password specifically for Latitude, type them in the boxes and then click **Log On**.

Note: As you type your password, periods display instead of the typed characters. If your password expires, the system requires you to change it. For more information, see Change Your Password.

- If your organization configured Latitude to allow an external logon (for example, your network credentials), leave the **Username** and **Password** boxes blank and click **External Log On**. If you aren't logged on externally, the system redirects you to your identity provider and prompts you to provide your credentials.

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- If you organization configured with **SSO Authentication** or **SAML conifgured**. Go to **configuration SAML 2.0** and **SAML settings** which are standard settings, that any SAML identity provider should provide. So, one in the single sign-on URL. So, where we are redirecting the authentication.

- The IDP basically and there are two ways that you can do the authentication. So usually, you call it as handshake so that can be a redirect, or it can be a post using OKTA verification method.

==== THEIRS //liquid/latitude.2023r1_systest/products/documentation/source/Liquid_Latitude_Help/Log_On_to_Latitude.htm#3

- If your organization is configured with SSO Authentication or SAML.then go to configuration SAML 2.0 and SAML settings which are standard settings provided by SAML identity provider.

- The IDP functions in two ways, by authenticating the user either through handshake or post method.

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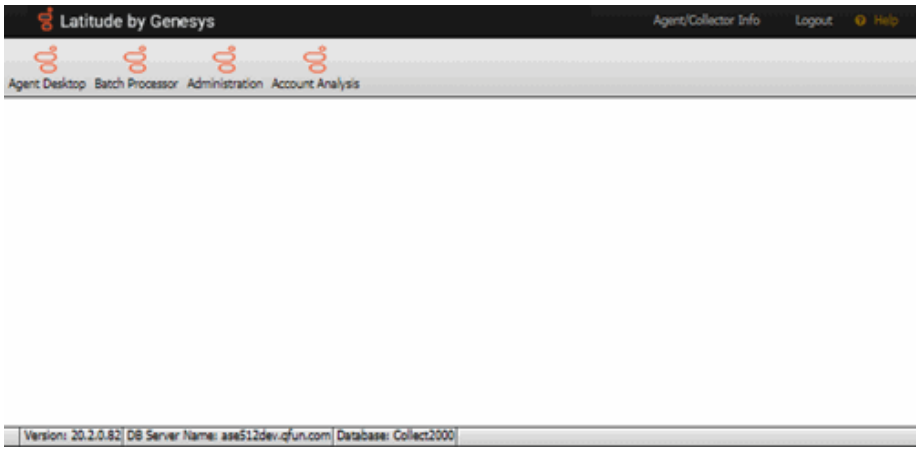
- This allows you to select a specific database to log in into (if multiple exist) while logging in on the web portal. If a different database is selected from the default, the newly selected database will become the default for future logins.

If your credentials are correct, the **Latitude by Genesys** page appears. Otherwise, an error message appears; provide the correct credentials or contact your system administrator for assistance.



3. Do one of the following:

    - To view or work an account, click **Agent Desktop**. A new browser tab opens. If any account interactions remained open when you last logged off, the **Open Interactions** panel appears. Otherwise, the **Search Accounts** panel appears. For more information, see Account Retrieval.
    - To process a batch of payment transactions (provided you have the appropriate permissions), click **Batch Processor**. For more information, see Process a Payment Batch.
    - To configure system codes, settings, permissions, and policies (provided you have the appropriate permissions), click **Administration**. For more information, see System Administration.

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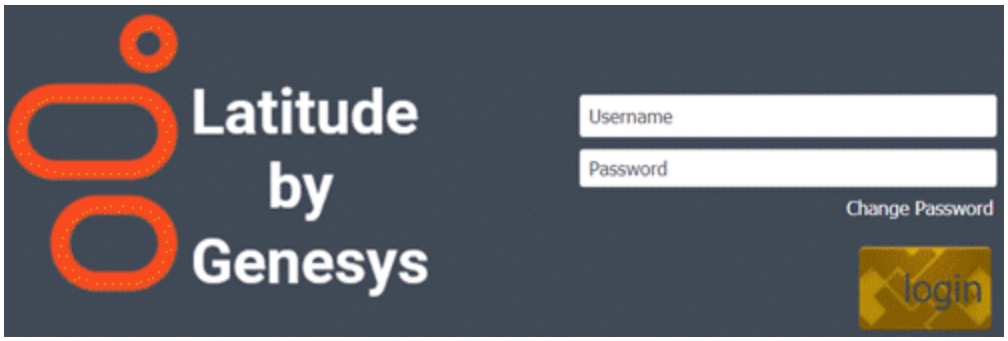
Change Your Password

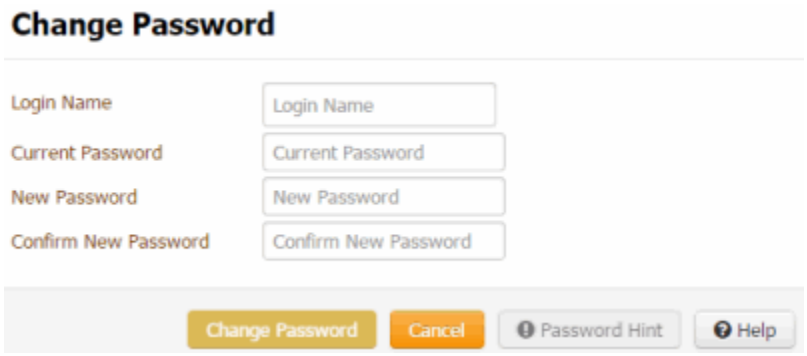
Use the **Change Password** dialog box to change your Latitude password. If your password is close to the expiration date (based on the Password Expiration permission setting), a warning appears under the **Change Password** link.

To change your password

1. Open Latitude in your browser. The **Latitude by Genesys Logon** page appears.



2. Click **Change Password**. The **Change Password** dialog box appears.



3. In the **Login Name** box, type your user ID.
4. In the **Current Password** box, type your current password.
5. In the **New Password** box, type your new password.

Tip: To view the requirements for creating a password, click **Password Hint**.

6. In the **Confirm Password** box, retype your new password.
7. Click **Change Password**.

Related Topics

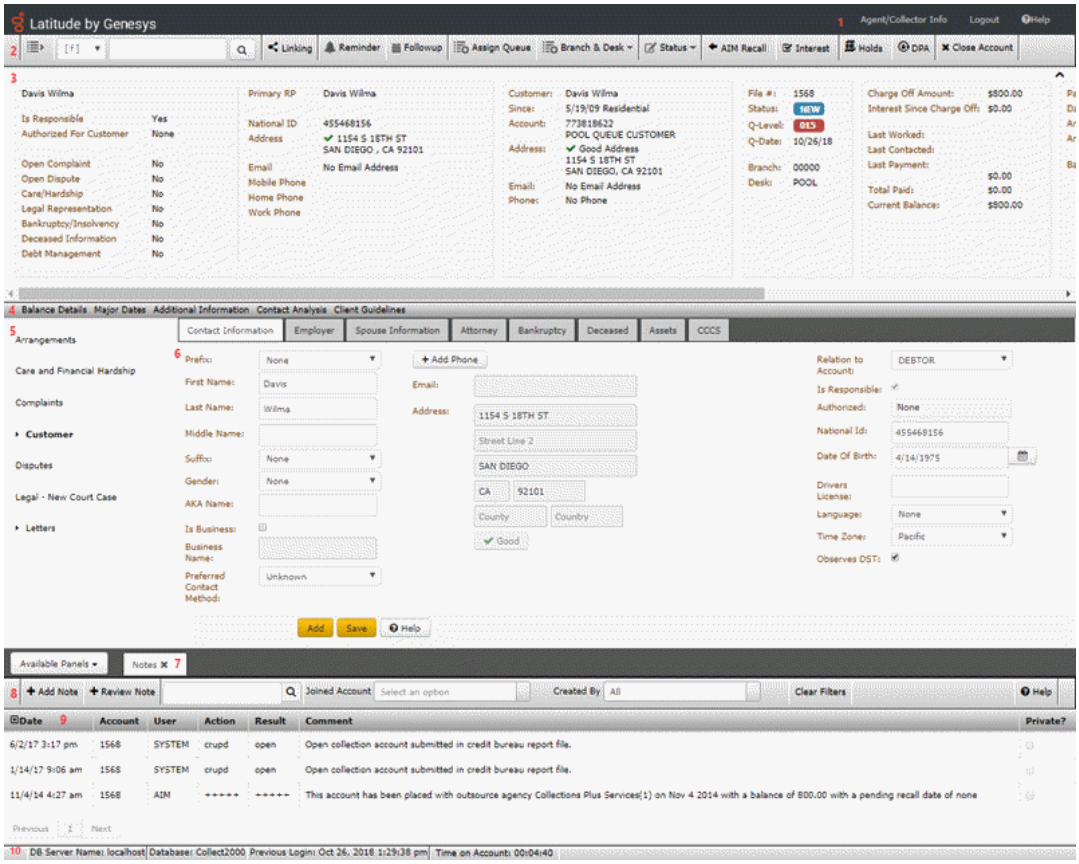
Log On to Latitude

Feedback

Work Form Overview

The **Work Form** is the main page in Latitude, and it consists of several sections. Each section allows you to perform specific actions related to that section.

For a quick overview, watch this video!



Note: A red asterisk (*) next to a field indicates a required field.

1. **Application toolbar:** Displays options for viewing the **Welcome** page, logging off Latitude and viewing the documentation. When processing a request, a yellow progress bar appears along the top edge of this toolbar and a circulating progress indicator appears next to the logo.

2. **Account toolbar:** Displays options for displaying and working an account.

3. **Delinquency** or **Recovery anchor:** Displays delinquency or recovery information for the selected account, depending on how your organization configured your system.

4. **Account Detail toolbar:** Displays options for viewing detail and summary information for the selected account.

5. **Task Panel navigation tree:** Displays the available task panels and allows you to open them.

6. **Task panel:** Displays the selected task panel.

7. **Reference Panel navigation bar:** Allows you to open and close reference panels.

8. **Reference Panel toolbar:** Displays options for the selected reference panel.

9. **Reference panel:** Displays the selected reference panel.

10. **Status bar:** Displays the following system and account status information:

    - **DB Server Name:** Name of the Latitude database server.

    - **Database:** Name of the Latitude database.

    - **Previous Login:** Date and time you last logged on to Latitude.

- **Time on Account:** Length of time that you've spent on this account. If the background color is gray, you haven't reached the threshold set for the **caution** or **warning** zones. If the background color is yellow, you've reached the threshold set for the **caution** zone. If the background color is red, you've reached the threshold set for the **warning** zone. For more information, see the **Time on Account Configuration** permission.

- **Queue Progress:** Number of accounts in the work queue. This value only appears when you are working accounts in a queue.

- **Alerts:** Number of issues related to the account. To view details about the alert, click **Alerts**. If you receive this message, "An error has occurred. If this problem persists, please contact Technical Support," you can view the details by clicking **Alerts**.

Icons

An icon allows you to perform a specific action. The following icons are available on the **Work Form:**

Icon	Name	Description
	Search Slide-in	Displays and hides the **Search & Queue Selection** panel, which allows you to search for and display accounts. The Search slide-in is on the **Account** toolbar.
^	Collapse	Collapses a section of the **Work Form** to hide its contents.
v	Expand	Expands a section of the **Work Form** to display its contents.
	Filter	Limits information in a data grid based on criteria you specify.

Form state

When you attempt to save information, the background of the "save" section of the panel you are working changes color to indicate the status of the attempted save.

Color	Description
Gray	Default color that indicates the user hasn't requested a "save" action yet.
Blue	Indicates the "save" action is processing.
Green	Indicates the "save" action completed without errors.
Red	Indicates that there was an error completing the "save" action.

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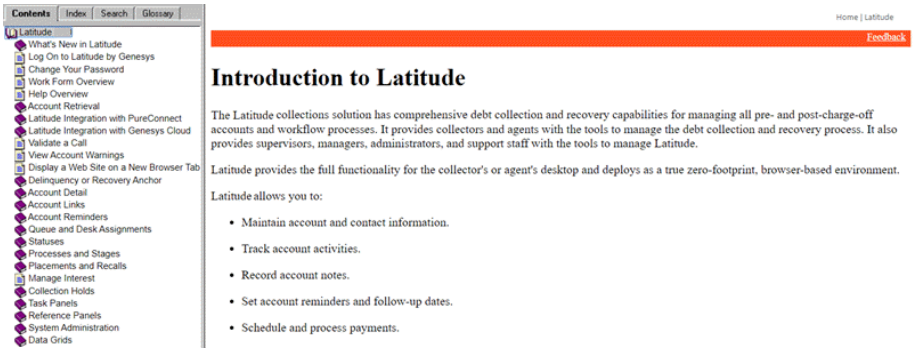
Help Overview

Latitude help provides you with information for using Latitude. You can locate and view help topics using the table of contents, index, and search features. You can also open help within certain areas of Latitude (for example, panels and dialog boxes) to view context-appropriate information.

To open Latitude help

- In the **Application** toolbar, click **Help**. The help opens with the introductory topic and table of contents displayed.

Note: To open the help to a context-appropriate topic, in the panel or dialog box you have open currently, click **Help**. The corresponding topic appears in a separate window. To display the table of contents, at the bottom of the help window, click **Show**.



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 display the table of contents, index, search feature, or glossary. When you click an option in the toolbar, the corresponding information appears in the **Navigation** pane.

2. **Navigation pane:** 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: Displays a glossary of terms and 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 for sending feedback through an email message to Latitude by Genesys Documentation.

5. **Content pane:** Displays the contents of a topic. To display recently visited topics, use your browser's **Back** and **Forward** options. To view the **Content** pane menu, right-click in the **Content** pane.

Search feature

You can use the search feature to locate 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 the 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.

Screen captures

Many topics contain a snapshot of the related application page. Use this sample graphic as a frame of reference to match the application page to the help topic. What you see displayed in the application may differ, depending on your system configuration, your permissions, and the options you select.

Related Topics

Introduction to Latitude

What's New in Latitude

Work Form Overview

Account Retrieval

Account Retrieval

There are several methods available for retrieving and displaying an account. The methods include:

- Searching for an account and selecting it from the search results.
- Selecting an account from open interactions.
- Opening a work queue of accounts.
- Selecting an account from your inventory.
- Selecting an account from your account history list.

All the retrieval methods require you to click the Search slide-in icon .

Related Topics

Account Search

Open Interactions

Work Queues

History

Select an Account from Inventory

Validate a Call

Search

Feedback

Account Search

Use the **Search Accounts** panel to search for an account based on specific search criteria and display it. Latitude uses wildcard searching for most criteria. For example, if you don't know the precise spelling of a name, you can type one or more characters in the **Name** box and search on a partial name. Latitude returns all records where the name begins with the specified characters. For example, "SMIT" returns "SMITH," "SMITHERS," and "SMITLEY."

Quick Search

The system attempts an exact match before attempting a wildcard match when you search for the following:

- Account number
- Customer ID #1
- Customer ID #2
- Customer PURN

Related Topics

Search for an Account

Select an Account From Search Results

Locate an Account Using Quick Search

Quick Search Codes

Search Permission

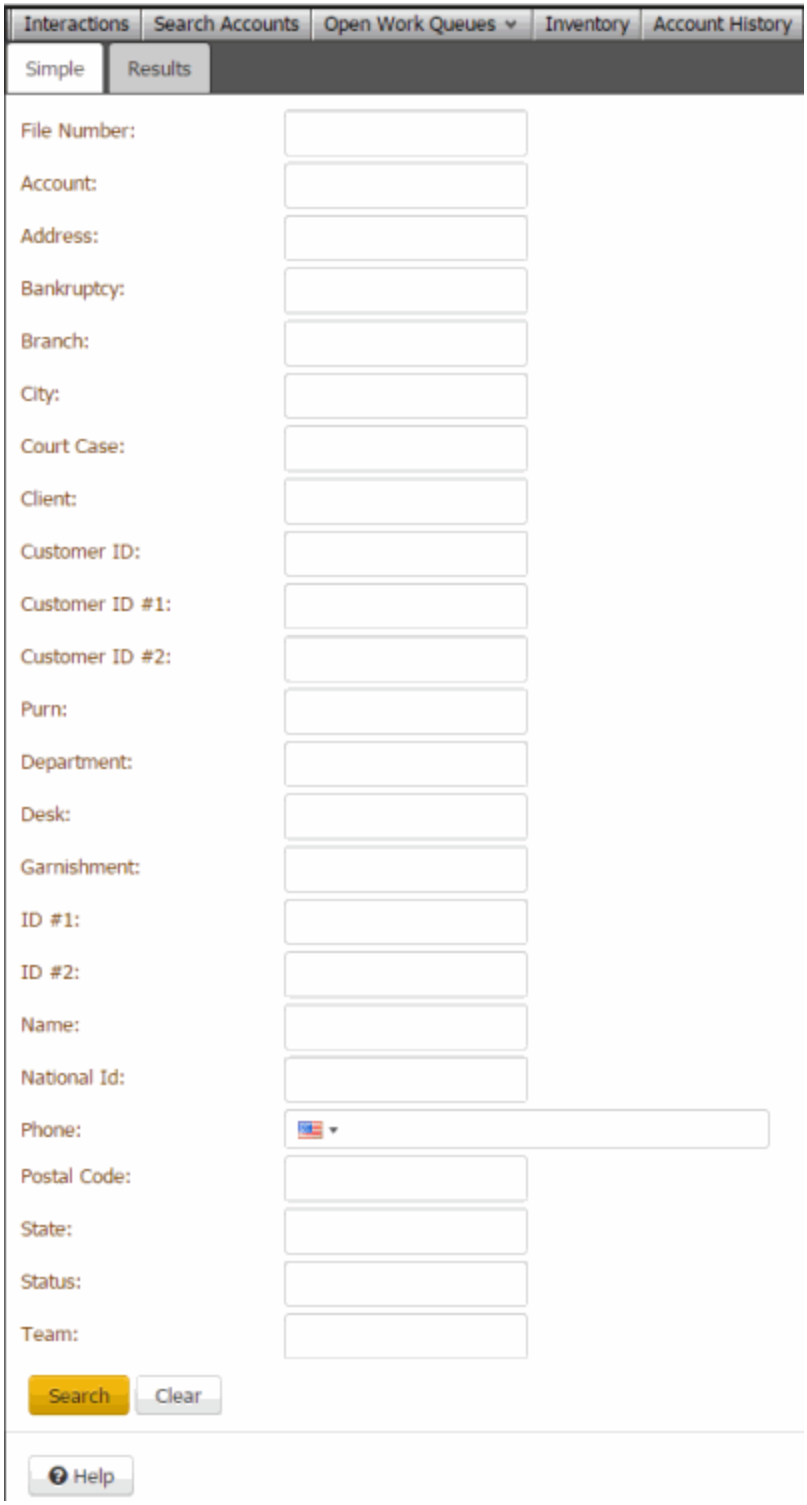
Feedback

Search for an Account

Use the **Simple** tab in the **Search Accounts** panel to search for an account using any combination of search criteria. If you don't have the Access Account Permission, you cannot view the account.

To search for an account

1. If the **Search & Queue Selection** panel isn't visible, click the Search slide-in icon. The **Search & Queue Selection** panel appears.
2. In the menu bar, click **Search Accounts** and then click the **Simple** tab.



The system only displays the search criteria that your permissions allow. Search criteria could include one or more of the following:

- **File Number:** Unique code that the system assigned to identify the account. The system doesn't allow wildcard searching on the file number.

- **Account:** Code that the client assigned to identify the account. You can specify a partial account number to have the system do a wildcard search.
- **Address:** First line of the customer's street address. You can specify a partial street address to have the system do a wildcard search.
- **Bankruptcy:** Case number the court assigned to the bankruptcy.
- **Branch:** Code that identifies the branch, or the branch name. You can specify a partial branch name to have the system do a wildcard search. The system doesn't allow wildcard searching on the branch code. If you specify five characters, the system searches for an exact match to the branch code. If you specify fewer than five characters or more than five characters, the system does a wildcard search on the branch name.
- **City:** City that is part of the customer's address. You can specify a partial city name to have the system do a wildcard search.
- **Client:** Unique code that your organization assigned to identify the client, or the client name. You can specify a partial client name to have the system do a wildcard search. The system doesn't allow wildcard searching on the client code. If you specify seven characters, the system searches for an exact match to the client code. If you specify fewer than seven characters or more than seven characters, the system does a wildcard search on the client name.
- **Court Case:** Case number the court assigned to the court case.
- **Customer ID:** Identification number associated to a party on an account. You can specify a partial ID number to have the system do a wildcard search.
- **Customer ID #1:** Identification number associated to a party on an account. You can specify a partial ID number to have the system do a wildcard search.
- **Customer ID #2:** Identification number associated to a party on an account. You can specify a partial ID number to have the system do a wildcard search.
- **Department:** Code that identifies the department that your organization assigned to a branch. You can specify a partial department name to have the system do a wildcard search.
- **Desk:** Code that identifies the desk, or the desk name. You can specify a partial desk name to have the system do a wildcard search. The system doesn't allow wildcard searching on the desk code. If you specify 10 characters, the system searches for an exact match to the desk code. If you specify fewer than 10 characters or more than 10 characters, the system does a wildcard search on the desk name.
- **Garnishment:** Case number the court assigned to the garnishment.
- **ID #1:** Identification number associated to an account. You can specify a partial ID number to have the system do a wildcard search.
- **ID #2:** Identification number associated to an account. You can specify a partial ID number to have the system do a wildcard search.
- **Intl Phone:** Any international phone number on the account. You can specify a partial non-formatted phone number to have the system do a wildcard search for a phone number that doesn't have a "bad" phone status.
- **Name:** Customer's name or business name. You can search on the first name only, last name only, the first name with last name, or business name. You can specify a partial or full name. For example, if you type "John" in the box, the system does a wildcard search for "John" as a first name, last name, or business name.
- **National ID:** Unique number the government issues to identify a person (for example, social security number or state ID). You can specify a partial ID number to have the system do a wildcard search. If you specify four characters exactly, the system also attempts to match the last four characters.

- **Phone:** Any phone number on the account. You can specify a partial non-formatted phone number to have the system do a wildcard search for a phone number that doesn't have a "bad" phone status. You can also use % and _ wildcard characters.
- **Postal Code:** Postal code that is part of the customer's address. You can specify a partial postal code to have the system do a wildcard search.
- **PURN:** Personal Unique Record Number. Alphanumeric code that an outside provider such as a credit bureau assigns to identify a person. You can specify a partial ID number to have the system do a wildcard search.
- **State:** State that is part of the customer's address. The system attempts an exact match only.
- **Status:** Code that identifies the status of the account, or the status description. You can specify a partial status description to have the system do a wildcard search. The system doesn't allow wildcard searching on the status code. If you specify five characters, the system searches for an exact match to the status code. If you specify fewer than five characters or more than five characters, the system does a wildcard search on the status description.
- **Team:** Name of the team that your organization assigned to a department. You can specify a partial team name to have the system do a wildcard search.

3. Type search criteria into one or more boxes and then click **Search**. The results display on the **Results** tab.

4. To clear the search criteria, click the **Simple** tab and then click **Clear**.

Related Topics

Select an Account From Search Results

Locate an Account Using Quick Search

Account Search

Access Account Permission

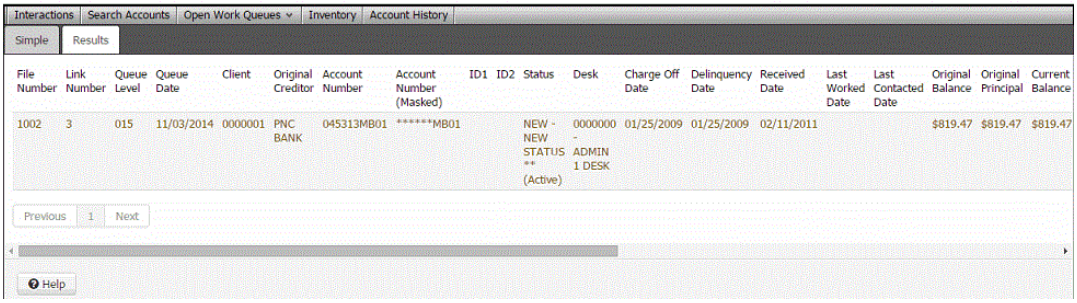
Feedback

Select an Account From Search Results

Use the **Results** tab in the **Search Accounts** panel to view the results of your search and select an account to display.

To select an account from search results

1. In the **Search Accounts** panel, click the **Results** tab.



The system displays the search result columns that your permissions allow.

2. If the search results exceed the maximum allowed to display on a single page, click a page number to display its contents. You can also click **Previous** and **Next** to move between pages.

3. To display an account, click a link in one of the columns. The following outcomes are possible:

    - If your organization requires you to validate information with the caller before displaying the account, the **Data Protection** dialog box appears. Verify the information with the caller and then click **Validated**. If you click **Not Validated**, the system doesn't display the account.
    - If there are warnings for the account, the **Warnings** dialog box appears. Review the warnings and then click **OK**.
    - The account displays.

Related Topics

Search for an Account

Data Grids

Account Search

Feedback

Locate an Account Using Quick Search

Use the quick search feature to locate an account using a single search criteria. For more information, see Quick Search Codes.

To locate an account using quick search

1. In the **Account** toolbar, do one of the following:

    - In the list box, click a search code.
    - In the **Search** box, type the code (for example, "F" for file number) and then press **Tab**. The system populates the list box with the specified code.

2. In the **Search** box, type the value.

Note: If you are searching by international phone number, click the country code in the list box within the **Search** box and then type the phone number.

3. Press **Enter** or click the Search icon. If multiple records match, the results appear on the **Results** tab. If a single record matches, the following outcomes are possible:

    - If your organization requires you to validate information with the caller before displaying the account, the **Data Protection** dialog box appears. Verify the information with the caller and then click **Validated**. If you click **Not Validated**, the system doesn't display the account.
    - If there are warnings for the account, the **Warnings** dialog box appears. Review the warnings and then click **OK**.
    - The account displays.

Related Topics

Quick Search Codes

Account Search

Feedback

Quick Search Codes

Quick search codes allow you to search for an account based on a single search criteria. The following codes are available when using the quick search feature:

Code	Description
A	Customer account number
D	Driver's license number
B	Bankruptcy
CC	Court Case
D1	Customer ID 1
D2	Customer ID 2
DID	Customer ID
DP	Customer PURN
F	File number
G	Garnishment
ID1	ID 1
ID2	Customer ID 2
P	Phone number
PI	International phone number
S	National ID (for example, Social Security Number)
V	Vehicle ID (for example, VIN)

Related Topics

Locate an Account Using Quick Search

Account Search

Open Interactions

Feedback

Open Interactions

Use the **Open Interactions** panel to view a list of accounts that have open interactions. An interaction remains open until one of the following occurs:

- You close the interaction using the **Close** or **Close All** options in the **Open Interactions** panel.
- You close the interaction using the **Close Account** option in the **Account** toolbar.

Note: If you have the **Auto Close Account** permission, the following actions close an open interaction automatically.

- You search for and select an account using the Search Accounts or Quick Search feature.
- You move to the next account in the work queue when working accounts in a queue.
- You close the work queue when working accounts in a queue.
- You select another account from inventory.
- You select another account from account history.

Note: If you leave an interaction open for 30 minutes or longer, other users can open that interaction.

Related Topics

View Open Interactions

Select an Account From Open Interactions

Close an Open Interaction

Feedback

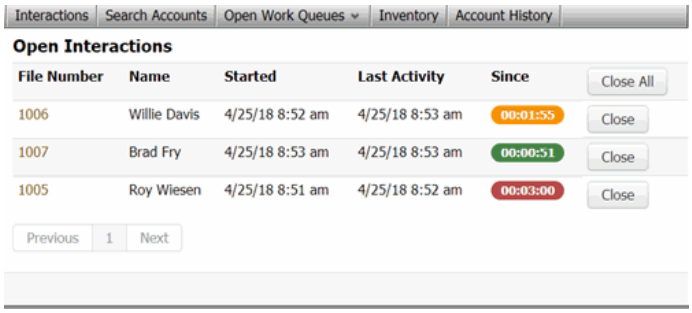
View Open Interactions

Use the **Open Interactions** panel to view all the accounts that have open interactions. For information about how long interactions remain open, see Open Interactions.

Note: If you just logged on to Latitude and you have open interactions, the **Open Interactions** panel displays automatically.

To view open interactions

1. If the **Search & Queue Selection** panel isn't visible, click the Search slide-in icon. The **Search & Queue Selection** panel appears.
2. In the menu bar, click **Interactions**.



File Number: Unique code that the system assigned to identify the account.

Name: Name of the customer associated to the account.

Started: Date and time an interaction started on the account.

Last Activity: Date and time the last activity occurred on the account.

Since: Length of time that you've had the interaction open. If the background color is green, you haven't reached the threshold set for the **caution** or **warning** zones. If the background color is yellow, you've reached the threshold set for the **caution** zone. If the background color is red, you've reached the threshold set for the **warning** zone. For more information, see **Time on Account Configuration** permission.

Close: Closes the interaction.

Related Topics

Open Interactions

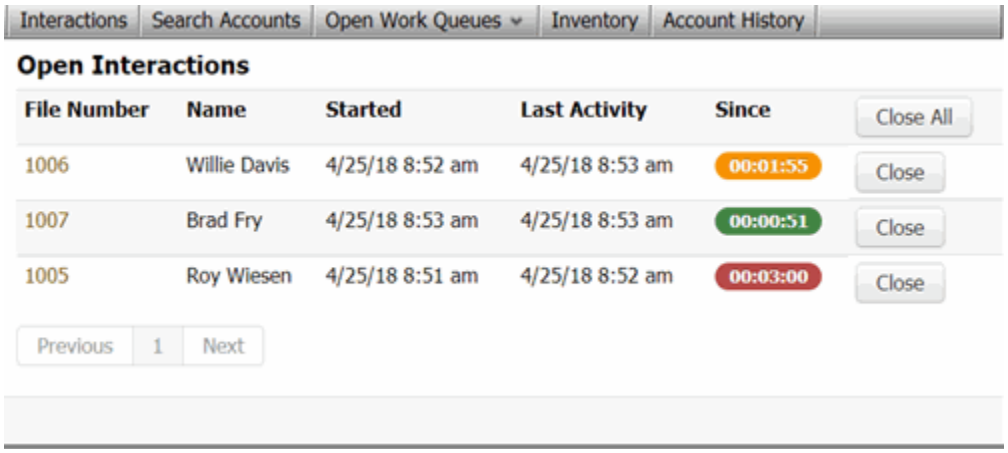
Feedback

Select an Account From Open Interactions

Use the **Open Interactions** panel to select an account to display.

To select an account from open interactions

1. If the **Search & Queue Selection** panel isn't visible, click the Search slide-in icon. The **Search & Queue Selection** panel appears.
2. In the menu bar, click **Interactions**.



3. In the **File Number** column, click the account. The following outcomes are possible:

    - If your organization requires you to validate information with the caller before displaying the account, the **Data Protection** dialog box appears. Verify the information with the caller and then click **Validated**. If you click **Not Validated**, the system doesn't display the account.
    - If there are warnings for the account, the **Warnings** dialog box appears. Review the warnings and then click **OK**.
    - The account displays.

Related Topics

Open Interactions

Feedback

Close an Open Interaction

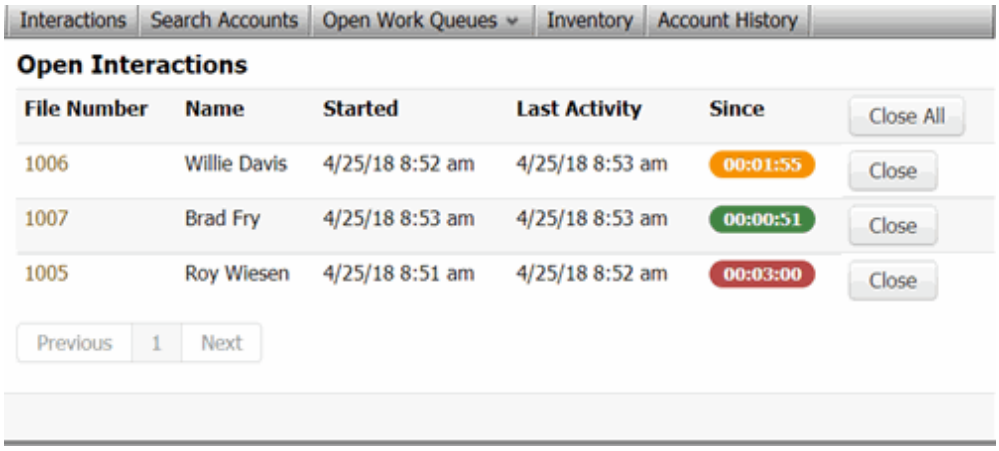
Use the **Open Interactions** panel or the Account toolbar to close a single or all open interactions.

To close an open interaction

1. To close an interaction for the account that is open currently, in the **Account** toolbar, click **Close Account**.
2. To select an open interaction to close, do the following:

a. In the **Account** toolbar, click the Search slide-in icon.

b. In the menu bar, click **Interactions**.



c. In the data grid, click **Close**.

3. To close all open interactions, click **Close All**.

Related Topics

Open Interactions

Work Queues

Feedback

Work Queues

Use the queue panels to open a work queue and begin working accounts in the order that Latitude presents them. Queues only include accounts flagged as "should queue." They don't include non-driver linked accounts, but they do include their account balances in the totals for the driver account that appears in the queue. While you have an account open, the status bar displays the number of accounts in the queue.

The following queues are available, depending on your permissions:

- **Collector queue:** Contains accounts assigned to a queue level that is less than 599. The Collector queue sorts accounts within each desk by the queue date (oldest to newest) and then within each queue date by the queue level (lowest to highest). Users specify the desk (their own or with permissions, another user's desk) of accounts to work and can limit the accounts to a specific client or all clients. Users then open the Collector queue for all the filtered accounts, only the filtered accounts for a specific queue date, or only the filtered accounts for a specific queue date and queue level.

- **Custom queue:** Contains accounts assigned to queue levels 425-499 that require a specific type of work (for example, skip tracing). The Custom queue sorts accounts by queue level from lowest to highest. Users open the Custom queue for accounts with a specific queue level.

- **Clerical queue:** Contains accounts assigned to queue levels 600-699 that require clerical support (for example, verification of a direct payment). The Clerical queue sorts accounts by queue level from lowest to highest. Users open the Clerical queue for accounts with a specific queue level.

- **Supervisor queue:** Contains accounts assigned to queue levels 700-799 that require supervisor support (for example, approval of a payment arrangement). The Supervisor queue sorts accounts by queue level from lowest to highest. Users open the Supervisor queue for accounts with a specific queue level.

Related Topics

Open the Collector Queue

Open the Custom Queue

Open the Clerical Queue

Open the Supervisor Queue

Open the Pool Queue

Close a Work Queue

Queue Level Codes

Change Continue Queuing Setting Permission

Queue Providers Permission

Require Note on Account Permission

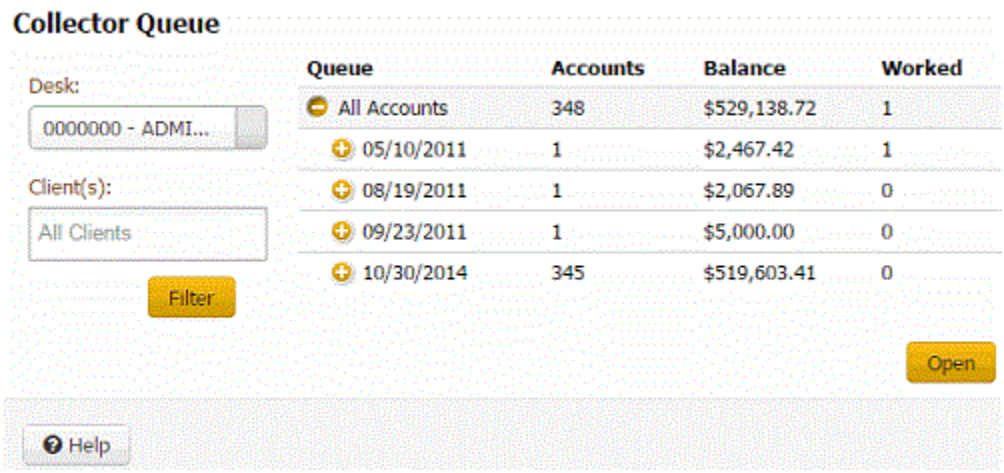
Feedback

Open the Collector Queue

Use the **Collector Queue** panel to select a group of accounts in the Collector queue and display the accounts one at a time based on the sort order.

To open the Collector queue

1. If the **Search & Queue Selection** panel isn't visible, click the Search slide-in icon. The **Search & Queue Selection** panel appears.
2. In the menu bar, click **Open Work Queues** and then click **Collector**. The **Collector Queue** panel appears.



Desk: Desk for which to display accounts. This list box is available if you have permission to work other collector desks.

Client(s): Clients for which to display accounts.

Filter: Click to display the accounts for the specified desk and clients.

Queue: Date the system or a user assigned the account to the Collector queue.

Accounts: At the All Accounts level, the total number of accounts. At the Date level, the total number of accounts with that queue date. At the Queue Level, the total number of accounts with that queue level.

Balance: At the All Accounts level, the total balance on all the accounts. At the Date level, the total balance on the accounts with that queue date. At the Queue Level, the total balance on the accounts with that queue level.

Worked: At the All Accounts level, the total number of times someone worked the accounts. At the Date level, the total number of times someone worked the accounts with that queue date. At the Queue Level, the total number of times someone worked the accounts with that queue level.

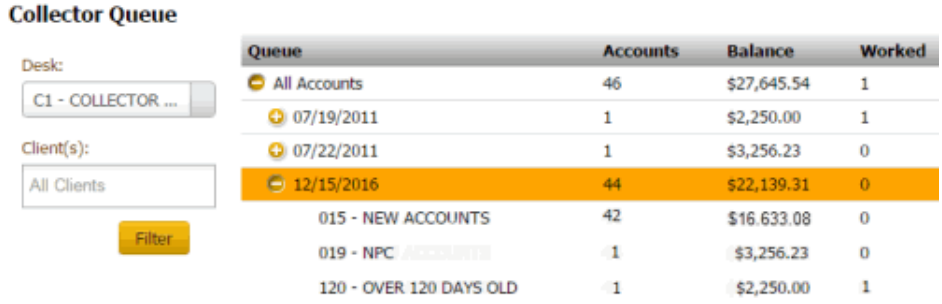
3. In the **Desk** box, click the desk for which to display accounts.

4. Do one of the following:

   - To display accounts for all clients, leave "All Clients" displayed in the **Client** box.
   - To specify a client for which to display accounts, click in the **Client** box and then click a client ID and name. Repeat this step to include other clients.

Tip: To clear a client filter, click the **x** next to the client ID and name.

5. Click **Filter**. Accounts for the specified desk and clients appear in the data grid.



6. Do one of the following:

   - To work all accounts in the queue, click **All Accounts**.
   - To work all accounts in the queue with a specific queue date, expand the **All Accounts** node and then click the queue date.
   - To work all accounts in the queue with a specific date and queue level, expand the queue date node and then click the queue level.

7. Click **Open**. The first account in the queue displays.

Notes:

- If your organization requires you to validate information with the caller, the system displays the **Data Protection** dialog box before displaying the account. For more information, see Validate a Call.
- If there are warnings for the account, the system displays the **Warnings** dialog box before displaying the account. For more information, see View Account Warnings.

8. To move to the next account in the queue, in the **Account** toolbar, click **Next**.

Note: If your organization requires you to add notes to accounts after working them, you cannot move to the next account until you add a note to the account displayed currently. For more information, see Add an Account Note.

Related Topics

Data Grids

Work Queues

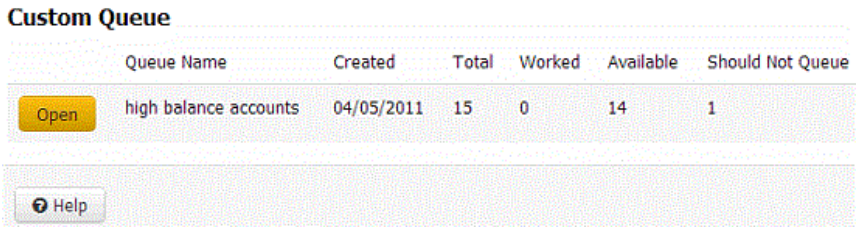
Feedback

Open the Custom Queue

Use the **Custom Queue** panel to select a Custom queue and display the accounts one at a time based on the sort order.

To open the Custom queue

1. If the **Search & Queue Selection** panel isn't visible, click the Search slide-in icon. The **Search & Queue Selection** panel appears.
2. In the menu bar, click **Open Work Queues** and then click **Custom**. The **Custom Queue** panel appears.



Queue Name: Name of the queue.

Created: Date a user created the queue.

Total: Total number of accounts in the queue.

Worked: Number of accounts in the queue that a user has worked.

Available: Number of accounts in the queue that are available to work.

Should Not Queue: Number of accounts that fit the criteria for inclusion in the queue, but the system or a user flagged them for exclusion from the queue.

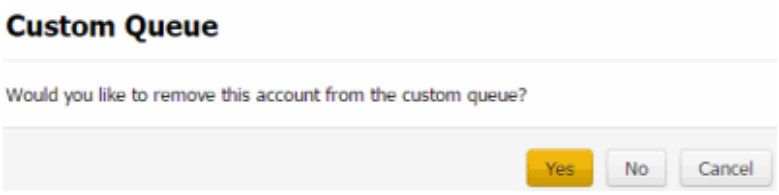
3. Click **Open** next to the queue to open. The first account in the queue displays.

Notes:

- If your organization requires you to validate information with the caller, the system displays the **Data Protection** dialog box before displaying the account. For more information, see Validate a Call.
- If there are warnings for the account, the system displays the **Warnings** dialog box before displaying the account. For more information, see View Account Warnings.

4. To move to the next account in the queue, in the **Account** toolbar, click **Next**. The **Custom Queue** dialog box appears.

Note: If your organization requires you to add notes to accounts after working them, you cannot move to the next account until you add a note to the account displayed currently. For more information, see Add an Account Note.



5. Do one of the following:

   - To remove the account from the queue, click **Yes**. The system removes the account from the Custom queue and displays the next account in the queue.

Note: If your organization requires you to set a follow-up date on accounts, the system displays the **Account Follow-up** dialog box before displaying the account. For more information, see Set an Account Follow-up Date.

   - To keep the account in the queue, click **No**. The system retains the account in the Custom queue and displays the next account in the queue.
   - If you don't want to move to the next account in the queue, click **Cancel**.

Related Topics

Custom Queue Options Permission

Data Grids

Work Queues

Feedback

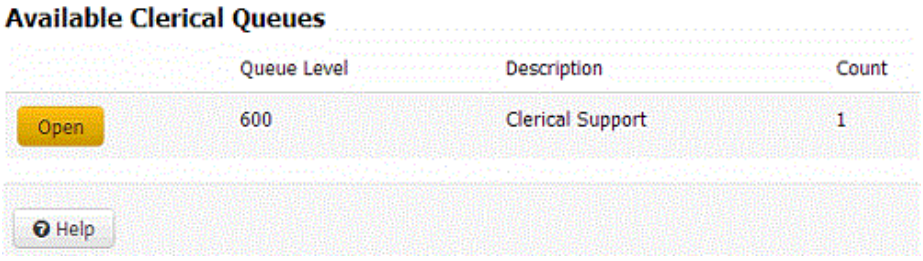
Open the Clerical Queue

Use the **Available Clerical Queues** panel to select a Clerical queue and display the accounts one at a time based on the sort order.

Note: For a Clerical queue to function correctly, only allow one user at a time to work the queue. Multiple users working the same Clerical queue at the same time causes system issues.

To open the Clerical queue

1. If the **Search & Queue Selection** panel isn't visible, click the Search slide-in icon. The **Search & Queue Selection** panel appears.
2. In the menu bar, click **Open Work Queues** and then click **Clerical**. The **Available Clerical Queues** panel appears.



Queue Level: Three-digit code that identifies the queue level. For more information about queue level codes, see Queue Level Codes.

Description: Name of the queue.

Count: Number of accounts in the queue.

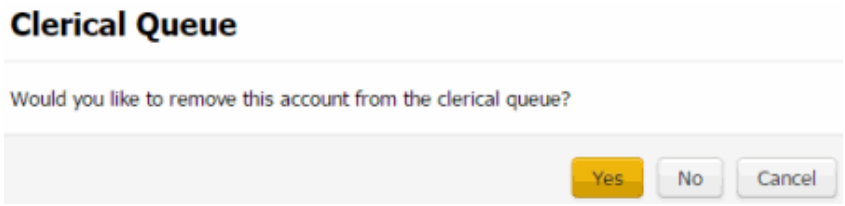
3. Click **Open** next to the queue to open. The first account in the queue displays.

Notes:

- If your organization requires you to validate information with the caller, the system displays the **Data Protection** dialog box before displaying the account. For more information, see Validate a Call.
- If there are warnings for the account, the system displays the **Warnings** dialog box before displaying the account. For more information, see View Account Warnings.

4. To move to the next account in the queue, in the **Account** toolbar, click **Next**. The **Clerical Queue** dialog box appears.

Note: If your organization requires you to add notes to accounts after working them, you cannot move to the next account until you add a note to the account displayed currently. For more information, see Add an Account Note.



5. Do one of the following:

   - To remove the account from the queue, click **Yes**. The system removes the account from the Clerical queue and displays the next account in the queue.

Note: If your organization requires you to set a follow-up date on accounts, the system displays the **Account Follow-up** dialog box before displaying the account. For more information, see Set an Account Follow-up Date.

   - To keep the account in the queue, click **No**. The system retains the account in the Clerical queue and displays the next account in the queue.
   - If you don't want to move to the next account in the queue, click **Cancel**.

Related Topics

Data Grids

Work Queues

Feedback

Open the Supervisor Queue

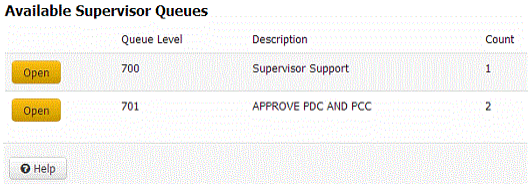
Use the **Available Supervisor Queues** panel to select a Supervisor queue and display the accounts one at a time based on the sort order.

Note: For a Supervisor queue to function correctly, only allow one user at a time to work the queue. Multiple users working the same Supervisor queue at the same time causes system issues.

To open the Supervisor queue

1. In the **Account** toolbar, click the Search slide-in icon. The **Search Accounts** panel appears.

2. In the menu bar, click **Open Work Queues** and then click **Supervisor**. The **Available Supervisor Queues** panel appears.



Queue Level: Three-digit code that identifies the queue level. For more information about queue level codes, see Queue Level Codes.

Description: Name of the queue.

Count: Number of accounts in the queue.

3. Click **Open** next to the queue to open. The first account in the queue displays.

Notes:

- If your organization requires you to validate information with the caller, the system displays the **Data Protection** dialog box before displaying the account. For more information, see Validate a Call.
- If there are warnings for the account, the system displays the **Warnings** dialog box before displaying the account. For more information, see View Account Warnings.

4. To move to the next account in the queue, in the **Account** toolbar, click **Next**. The **Support Queue** dialog box appears.

Note: If your organization requires you to add notes to accounts after working them, you cannot move to the next account until you add a note to the account displayed currently. For more information, see Add an Account Note.

5. Do one of the following:

- To remove the account from the queue, click **Yes**. The system removes the account from the Supervisor queue and displays the next account in the queue.

Note: If your organization requires you to set a follow-up date on accounts, the system displays the **Account Follow-up** dialog box before displaying the account. For more information, see Set an Account Follow-up Date.

- To keep the account in the queue, click **No**. The system retains the account in the Supervisor queue and displays the next account in the queue.
- If you don't want to move to the next account in the queue, click **Cancel**.

Related Topics

Data Grids

Work Queues

Feedback

Open the Pool Queue

Use the **Open Work Queues** menu option to open the Pool queue. The Pool queue contains a group of accounts that are available to multiple agents. Unlike static Custom queues, Pool queues are dynamic, with accounts flowing in and out of it as they qualify or disqualify. Accounts in a Pool queue reside on an inventory-type desk, where multiple users have access to them.

To open the Pool queue

1. If the **Search & Queue Selection** panel isn't visible, click the Search slide-in icon. The **Search & Queue Selection** panel appears.
2. In the menu bar, click **Open Work Queues** and then click **Pool**. The first account in the queue displays.

Notes:

- If your organization requires you to validate information with the caller, the system displays the **Data Protection** dialog box before displaying the account. For more information, see Validate a Call.
- If there are warnings for the account, the system displays the **Warnings** dialog box before displaying the account. For more information, see View Account Warnings.

3. To move to the next account in the queue, in the **Account** toolbar, click **Next**. The next account in the work queue appears. Accounts drop out of the Pool queue as users work them. The system doesn't prompt you to remove them.

Notes:

- The system assigns payments to the desk assigned to the account. If you add a promise to an account in the Pool queue, change the desk before applying the payment. Ensure that the system assigned the account to your desk before adding a PDC (post-dated payment).
- If your organization requires you to add notes to accounts after working them, you cannot move to the next account until you add a note to the account displayed currently. For more information, see Add an Account Note.

Related Topics

Data Grids

Work Queues

Feedback

Close a Work Queue

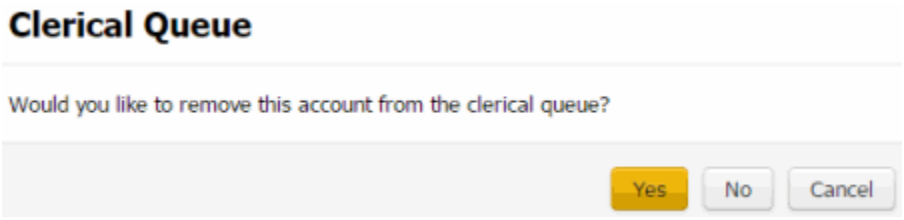
Use the **Search Accounts** panel to close a queue that is open on the Agent Desktop.

To close a work queue

1. In the **Account** toolbar, do one of the following:
   - Click the Search slide-in icon. In the **Search Accounts** panel, in the menu bar, click **Close Work Queue**. The system closes the queue and the **Search Accounts** panel.
   - Click **Close Queue**. When working a Collector queue, the system closes the queue. When working a Custom, Clerical, or Supervisor queue, the **[Queue Name] Queue** dialog box appears.

Note: If your organization requires you to add notes to accounts after working them, you cannot close the queue until you add a note to the account. For more information, see Add an Account Note.

2. If the **[Queue Name] Queue** dialog box appears, do one of the following:



- To remove the account from the queue, click **Yes**. The system removes the account from the queue and closes the queue.

Note: If your organization requires you to set a follow-up date on accounts, the system displays the **Account Follow-up** dialog box before closing the queue. For more information, see Set an Account Follow-up Date.

- To keep the account in the queue, click **No**. The system retains the account in the queue and closes the queue.
- To keep the queue open, click **Cancel**.

Related Topics

Work Queues

History

Feedback

Account History

Use the **Account History** panel to view accounts worked previously and then select an account to display.

Related Topics

Select an Account From History

Purge Account History

Feedback

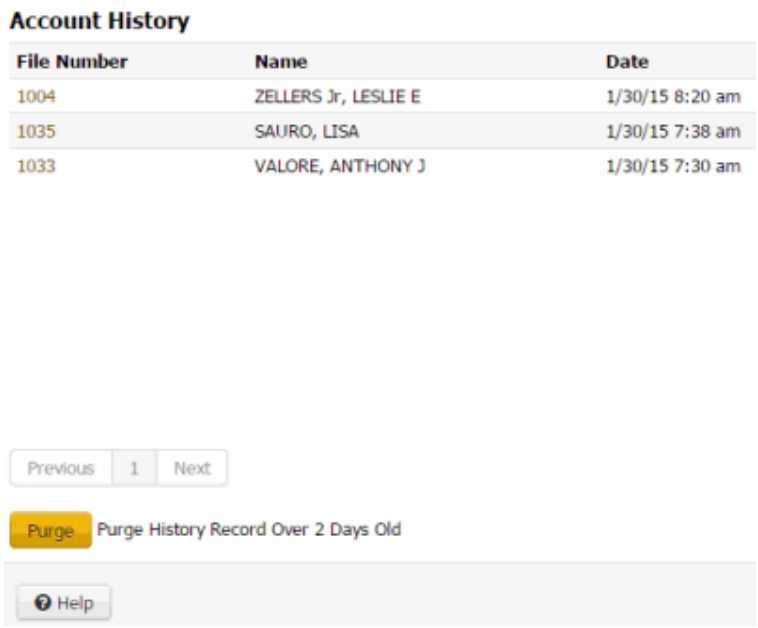
Select an Account From History

Use the **Account History** panel to view accounts previously worked and then select an account to display.

To select an account from history

1. If the **Search & Queue Selection** panel isn't visible, click the Search slide-in icon. The **Search & Queue Selection** panel appears.

2. In the menu bar, click **Account History**. The **Account History** panel appears.



File Number: Unique code that the system assigned to identify the account.

Name: Name of the customer associated to the account.

Date: Date and time a user last viewed or worked the account.

3. In the **File Number** column, click the account. The following outcomes are possible:

   - If your organization requires you to validate information with the caller before displaying the account, the **Data Protection** dialog box appears. Verify the information with the caller and then click **Validated**. If you click **Not Validated**, the system doesn't display the account.
   - If there are warnings for the account, the **Warnings** dialog box appears. Review the warnings and then click **OK**.
   - The account displays.

Related Topics

Data Grids

Purge Account History

Account History

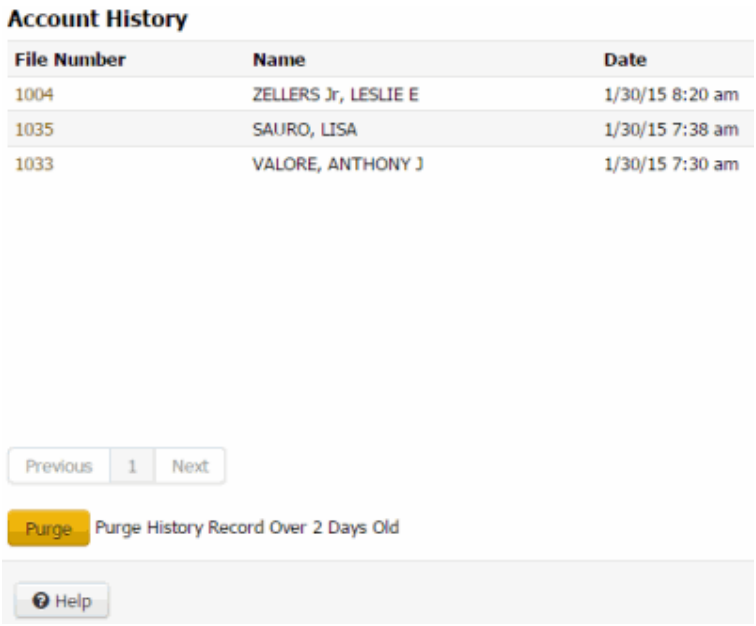
Purge Account History

Use the **Account History** panel to delete accounts from account history that have been in account history for more than two days. The purge process doesn't delete the accounts from the system.

To purge account history

1. If the **Search & Queue Selection** panel isn't visible, click the Search slide-in icon. The **Search & Queue Selection** panel appears.

2. In the menu bar, click **Account History**. The **Account History** panel appears.



3. Click **Purge**.

Related Topics

Data Grids

Select an Account From History

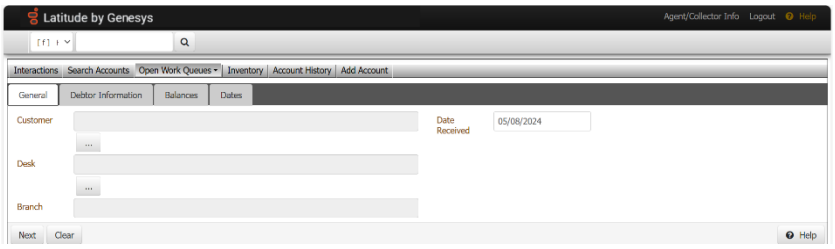
Account History

Add Accont

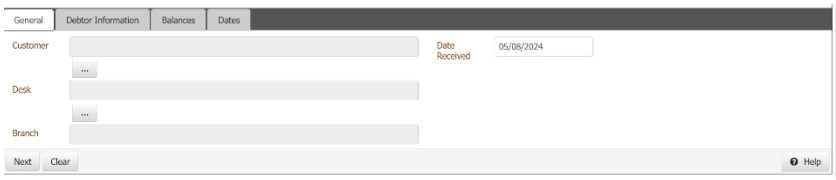
Add Accont

Add Account permission was created to configure to add a new account. When enabled, a new option "Add Account" is available on the tool bar in the Agent Desktop. Users can also select a default status code for the new account.

When the status of the Account is not selected, it chooses to be ‘NEW ’.



General



a. You can add Customer, Branch, Desk, and Received Date using this tab.

b. Customer, Branch, and Desk can be selected using their respective dialogs.

c. The customer dialog has filters related to Customer Group and Class of Business, which must help you choose a Customer Code. You can also filter based on Customer Code and Customer Name .

d. Desk Dialog has a filter related to Branch Codes, which can be used to choose a Desk Code. The branch is selected based on the selected Desk. You can also filter based on Desk Code and Desk Name.

Debtor Information

a. You can enter information like Account Number, Delinquency Date, Original Creditor, and Charged Off on this tab.

b. You can also add Debtors in this tab. The order in which Debtors are added decides the Sequence.

c. The first debtor is always the Primary Debtor (Sequence = 0) and a Responsible Debtor by default.

d. You can also enter information like Name, Gender, National ID, Date of Birth, Driver's License Number, Language, Time zone, Business, and Business Name in each Debtor tab.

Balances

- If the Charged Off option is checked in the Debtor Information tab, 10 fields are visible in this tab whose labels will be based on what has been configured under the Money Titles tab in the System Configuration permission. These fields and the Total Balance Placed fields are used to populate the Original and Current Balances of the account. The fee Schedule of the account can also be selected, if not selected then the Customer Fee Schedule will be used for this account.

- If the Charged Off option is unchecked that is if the account is Delinquent, buckets configured in the permission "Delinquency Aging Bucket Labels" will be visible in this tab. Users can enter the bucket amounts for these buckets and the Original and Current Balances of the account will be based on these bucket amounts. Users will also be able to enter information like Days Past Due, Cycle ID, Recurring Billing Amount, and Billing FrequencyID in this tab.

Dates

- Date fields like user-configured dates in System Configuration permission, Last Interest Date, Last Interest Rate, Customer Last Charged Date, and Customer Last Paid Date will be available in this tab .

- The Users can switch between tabs using the Prev and Next buttons. Users will be able to go to the next tab only when all required fields in a particular tab are entered. Users can reset all fields and go back to the first tab using the Clear button. Users can create an account using the Save button on the last tab and once an account is successfully created. They can open the account using the Open button.

Feedback

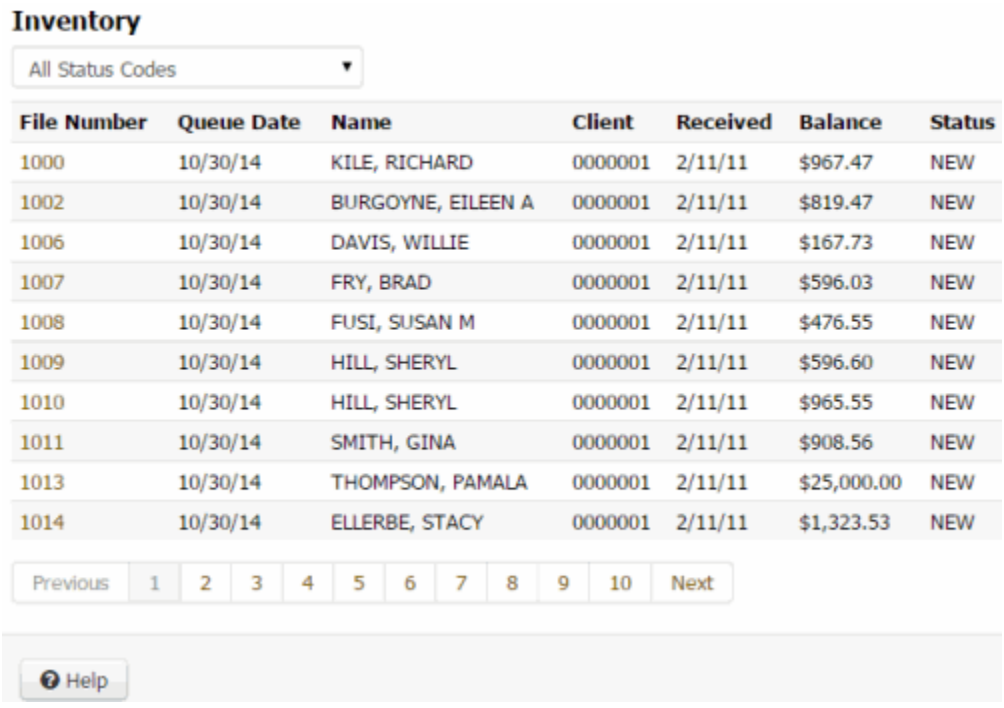
Select an Account from Inventory

Use the **Inventory** panel to view accounts assigned to you and then select an account to display.

To select an account from inventory

1. If the **Search & Queue Selection** panel isn't visible, click the Search slide-in icon. The **Search & Queue Selection** panel appears.

2. In the menu bar, click **Inventory**. The **Inventory** panel appears.



Filter: Account status for which to display accounts. If you select **All Status Codes**, all accounts assigned to you display, regardless of account status.

File Number: Unique code that the system assigned to identify the account.

Queue Date: Date the system or a user assigned the account to the queue.

Name: Name of the customer associated to the account.

Client: Number that identifies the client associated to the account.

Received: Date your organization received the account.

Balance: Account balance.

Status: Status of the account.

3. In the **Filter** list box, click a status code for which to display accounts.
4. In the **File Number** column, click the account. The following outcomes are possible:
    - If your organization requires you to validate information with the caller before displaying the account, the **Data Protection** dialog box appears. Verify the information with the caller and then click **Validated**. If you click **Not Validated**, the system doesn't display the account.
    - If there are warnings for the account, the **Warnings** dialog box appears. Review the warnings and then click **OK**.
    - The account displays.

Related Topics

Data Grids

Account Retrieval

Latitude Integration with PureConnect

PureConnect Dialer Agent Interface

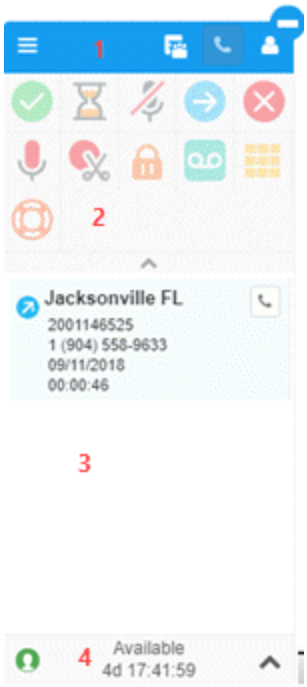
The **PureConnect Dialer Agent Interface** adds PureConnect's Interaction Dialer capabilities to Latitude, including automated dialing and manual calling.

Important!

This feature is available to Latitude clients who also have Customer Interaction Center, which is a Genesys product on the PureConnect platform. For more information, see Customer interaction Center in the PureConnect Documentation Library.

The interface includes the following features:

- Single sign-on to Interaction Dialer.
- Inbound call account pop based on ANI lookup.
- End a call and then disposition it. User cannot receive the next call until after dispositioning the current call.
- Transfer a call to another user.
- Conference in a third party.
- Request a break. Agent cannot receive calls until indicating that the break ended.



1. **Dialer Agent Interface toolbar:** Displays options for the **Dialer Agent Interface**.

Icon	Name	Description
	Hamburger menu	Displays a list of options for the **Dialer Agent Interface**, such as viewing interactions or logging on to or off of campaigns.
	Workgroup Queues icon	Opens the **CRM web Client** window to allow you to view your workgroup queues.
	Phone icon	Feature not available.
	User icon	Displays a list of user options, such as changing your station or logging out of the **Dialer Agent Interface**.

2. **Dialer toolbar:** Displays the actions available for the current campaign call. For more information about the icons, see PureConnect Dialer Agent Interface Icons.
3. **Information:** Displays information about the current campaign call and other notifications.
4. **Status bar:** Displays your current status and available options such as the option to request a break. For more information about user statuses, see Dialer User Statuses (PureConnect).

Related Topics

Log on to PureConnect Dialer Agent Interface

Set Your Workgroup Status (PureConnect)

Interaction Dialer Campaigns

Dialer User Statuses (PureConnect)

Dialer Views (PureConnect)

View Your Call History (PureConnect)

Place an Outbound Call (PureConnect)

Change Your Station (PureConnect)

Change Your Dialer Password (PureConnect)

Log off PureConnect Dialer Agent Interface

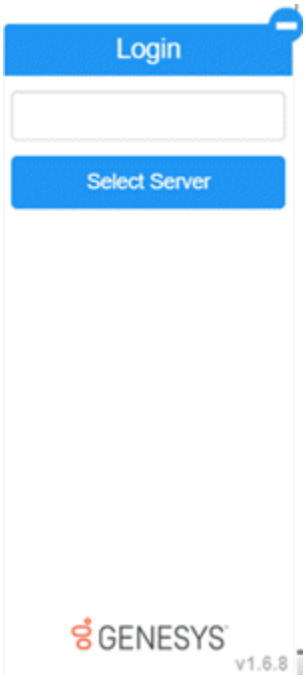
Log on to PureConnect Dialer Agent Interface

Use the **Logon** pages to log on to the **PureConnect Dialer Agent Interface**. Your organization must have configured the Dialer permission.

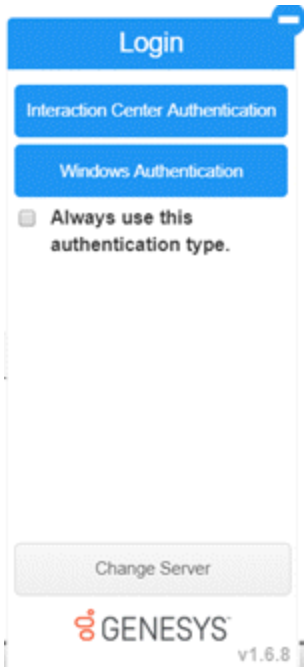
Note: The pages that appear depend on how your organization set up the Dialer permission and your user account. If your system administrator specified a server in the Dialer permission, the **Select Server** page doesn't appear. If your system administrator added your Dialer credentials to your user account profile, the **Authentication** page doesn't appear.

To log on to the PureConnect Dialer Agent Interface

1. Locate the **PureConnect Dialer Agent Interface** on the Latitude Agent Desktop.



2. In the **Server** box, if the Interaction Dialer server name doesn't appear, type the name of the Interaction Dialer server and then click **Select Server**. The **Authentication** page appears.

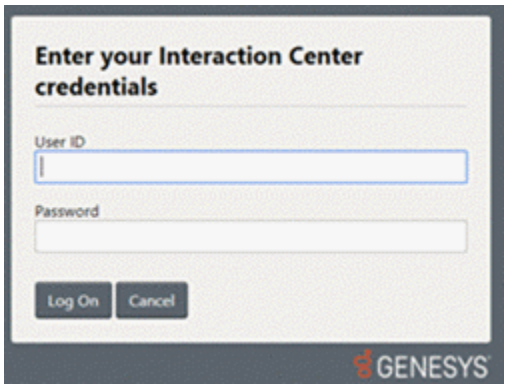


3. To use the same logon authentication each time you log on to Interaction Dialer, select **Always use this authentication type**.

4. Do one of the following:

    - To log on using your Latitude credentials, do the following:

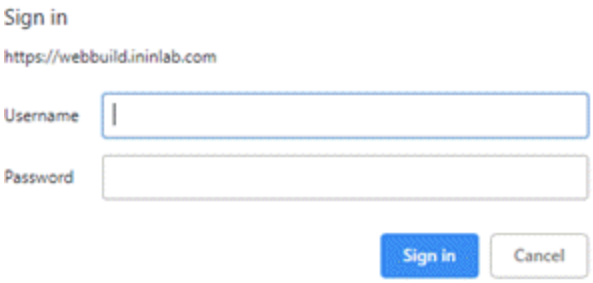
        a. Click **Interaction Center Authentication**.



        b. Type your credentials in the boxes and then click **Log On**.

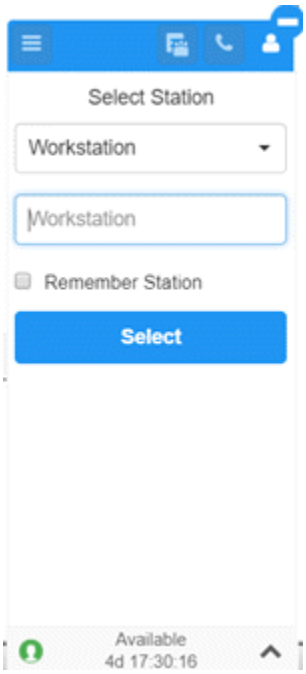
    - To log on using your Windows credentials, do the following:

        a. Click **Windows Authentication**.



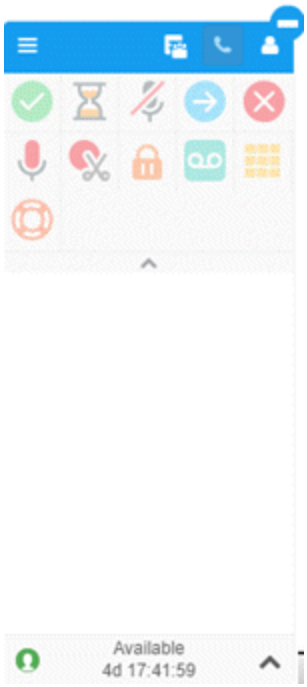
b. Type your Windows credentials in the boxes and then click **Sign in**.

If your credentials are correct, the **Select Station** page appears. Otherwise, an error message appears; provide the correct credentials or contact your system administrator for assistance.



5. In the **Select Station** list box, click the type of station through which to receive calls.
6. Do one of the following:
   - If you selected **Workstation**, in the **Workstation** box, type the name of the workstation to use.
   - If you selected **Remote Workstation**, in the **Remote Workstation** box, type the name of the remote workstation to use. In the **Remote Number** box, type the remote telephone number to use.
   - If you selected **Remote Number**, in the **Remote Number** box, type the remote telephone number to use.

   For more information about stations, see "Overview of stations" in the *Interaction Administrator* documentation.
7. To use the same station each time you log on to the **PureConnect Dialer Agent Interface**, select **Remember Station**.
8. Click **Select**. Latitude logs you on to the **PureConnect Dialer Agent Interface** with a status of Available.



Tip: To minimize the **PureConnect Dialer Agent Interface**, click the minus sign (-). The system minimizes the **PureConnect Dialer Agent Interface** and displays the Dialer icon.

Related Topics

Log off PureConnect Dialer Agent Interface

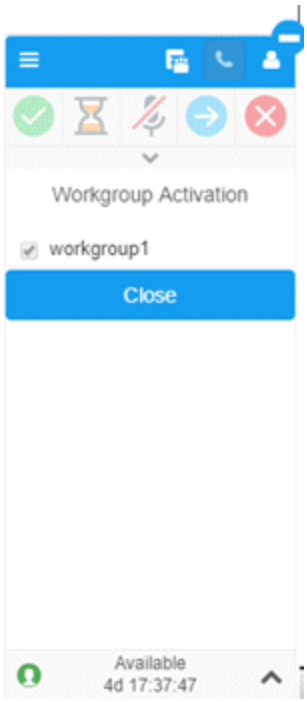
PureConnect Dialer Agent Interface

Set Your Workgroup Status (PureConnect)

Use the **Workgroup Activation** page to set your workgroup status to active so that you can receive ACD workgroup calls.

To set your workgroup status

1. In the **PureConnect Dialer Agent Interface** toolbar, click the Hamburger menu and then click **Workgroup Activation**.



2. If the check box for your workgroup is cleared, select it.

Related Topics

Log on to PureConnect Dialer Agent Interface

PureConnect Dialer Agent Interface

Interaction Dialer Campaigns

Interaction Dialer Campaigns

Your organization creates campaigns and assigns users to them to manage calling efforts. Each campaign contains a list of phone numbers to dial. Depending on the calling mode set for the campaign, Interaction Dialer places the call for you (Power or Predictive mode) or you place the call manually (Preview mode). Latitude searches for the party and displays the matching account. For multiple matches, Latitude displays the list of matching accounts and then you select the appropriate account to display.

Related Topics

PureConnect Dialer Agent Interface Icons

Log on to a Campaign (PureConnect)

Work a Power or Predictive Campaign (PureConnect)

Work a Preview Campaign (PureConnect)

Disposition a Call (PureConnect)

Request a Break (PureConnect)

End Your Break (PureConnect)

Request Assistance with a Call (PureConnect)

Transfer a Call (PureConnect)

View Your Campaign Interactions (PureConnect)

Log off a Campaign (PureConnect)

PureConnect Dialer Agent Interface

PureConnect Dialer Agent Interface Icons

The following table lists the icons available in the **PureConnect Dialer Agent Interface** toolbar. If an option is unavailable, the icon is dim instead of brightly colored. If an icon has a blue underline, it is selected currently.

Icon	Name	Description
	Dial Pad icon	Opens the dial pad while you are on a call to allow you to: • Send DTMF (Dual-Tone Multi-Frequency) tones to the connected call • Select IVR options • Provide information such as an account number or credit card number
	Dialer Agent Interface icon	Represents the minimized state of the **PureConnect Dialer Agent Interface**. To maximize the interface, click the icon.
	Disconnect icon	Disconnects or skips the call.
	Hold icon	Places the call on hold. To resume the call, click the icon again.
	Mute icon	Mutes the call. To unmute the call, click the icon again.
	Place This Call icon	Places a call to the number in the campaign list.
	Record icon	Records the call and saves it as a WAV file. To stop recording, click the icon again.
	Request Assistance icon	Opens the **Request Assistance** dialog box to allow you to request assistance from a supervisor.
	Secure Plus icon	Starts a separate, secure session to allow the customer to provide confidential information (such as credit card data) so that you cannot see or hear it.
	Snippet icon	Feature not available in the Latitude integration to Interaction Dialer.
	Transfer icon	Opens the **Transfer** dialog box to allow you to transfer the call to another user, workgroup, or outside phone number.
	Voicemail icon	Sends an incoming or connected call to your voicemail.

Related Topics

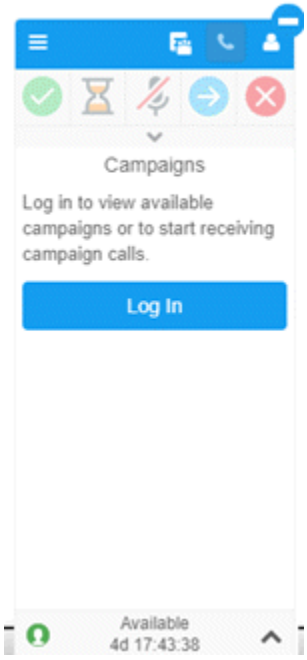
PureConnect Dialer Agent Interface

Log on to a Campaign (PureConnect)

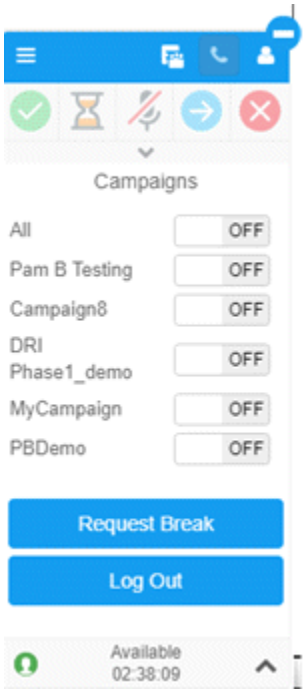
Use the **Campaigns** page to log on to one or more campaigns.

To log on to a campaign

1. In the **PureConnect Dialer Agent Interface** toolbar, click the Hamburger menu and then click **Campaigns**.

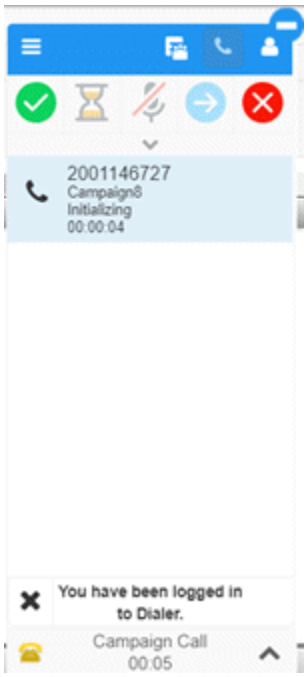


2. Click **Log in**. The system logs you on to Interaction Dialer and displays the available campaigns.



3. Use the slider to turn on all campaigns or just specific ones.

4. In the **PureConnect Dialer Agent Interface** toolbar, click the Hamburger menu and then click **Interactions**. The specified campaign opens and the first interaction appears.



5. Do one of the following:

    - If the campaign calling mode is Power or Predictive, see Work a Power or Predictive Campaign (PureConnect).

    - If the campaign calling mode is Preview, see Work a Preview Campaign (PureConnect).

Related Topics

Log off a Campaign (PureConnect)

Interaction Dialer Campaigns

Work a Power or Predictive Campaign (PureConnect)

Use the **Dialer Agent Interface** to work a Power or Predictive campaign. When the campaign calling mode is Power or Predictive, the following occurs:

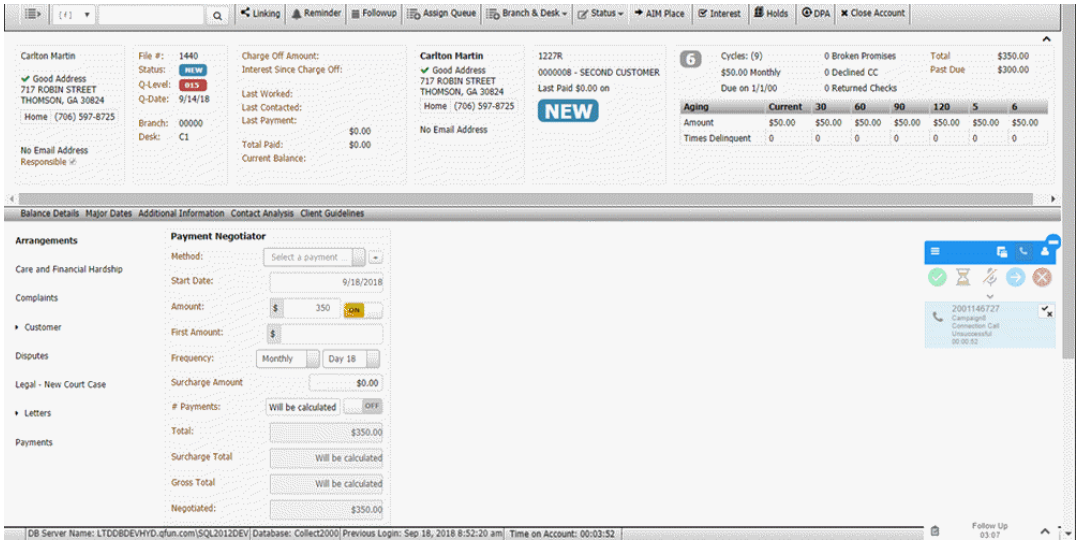
1. Dialer displays a campaign list phone number in the **PureConnect Dialer Agent Interface**.

2. Dialer places the call and delivers the call to you.

3. Latitude looks up the account based on the phone number and does one of the following:

    - If only one account has a matching phone number, Latitude displays the account.

    - If more than one account has a matching phone number, Latitude displays the list of matching accounts. Click the account to display. Latitude closes the list and displays the selected account.



4. During or immediately after ending the call, disposition it. For more information, see Disposition a Call (PureConnect).

Related Topics

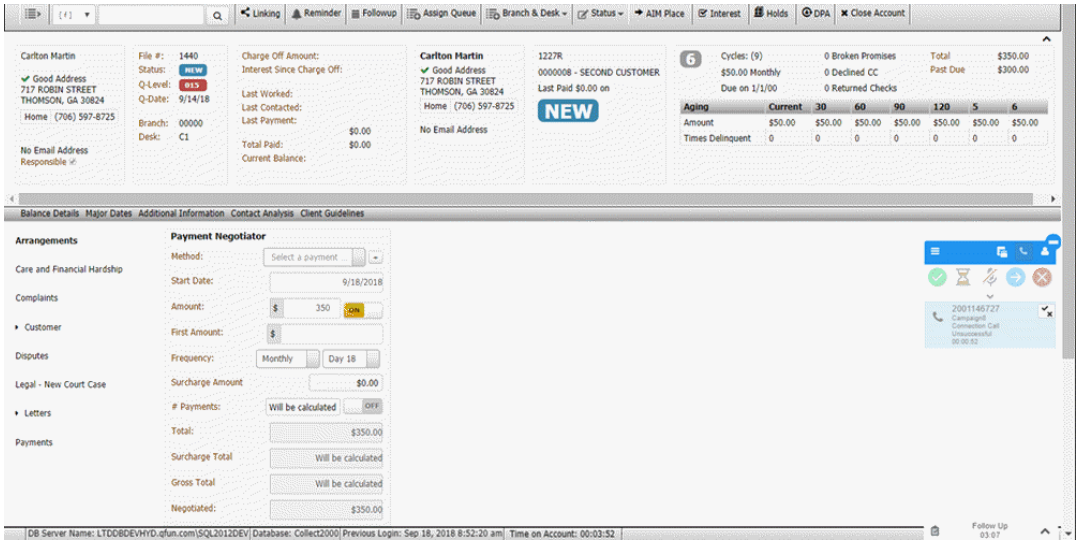
PureConnect Dialer Agent Interface Icons

Interaction Dialer Campaigns

Work a Preview Campaign (PureConnect)

Use the **Dialer Agent Interface** to work a Preview campaign. When the campaign calling mode is Preview, the following occurs:

1. Dialer displays a campaign list phone number in the **PureConnect Dialer Agent Interface**.
2. Dialer does not place the call.
3. Latitude looks up the account based on the phone number and does one of the following:
    - If only one account has a matching phone number, Latitude displays the account.
    - If more than one account has a matching phone number, Latitude displays the list of matching accounts. Click the account to display. Latitude closes the list and displays the selected account.



4. Do one of the following:

   - To place the call, in the Dialer toolbar, click the "Place this call" icon. Dialer places the call.
   - To skip to the next number in the campaign list, in the Dialer toolbar, click the "Skip this call" icon. Dialer displays the next account in the campaign list.

5. During or immediately after ending the call, disposition it. For more information, see Disposition a Call (PureConnect).

Related Topics

PureConnect Dialer Agent Interface Icons

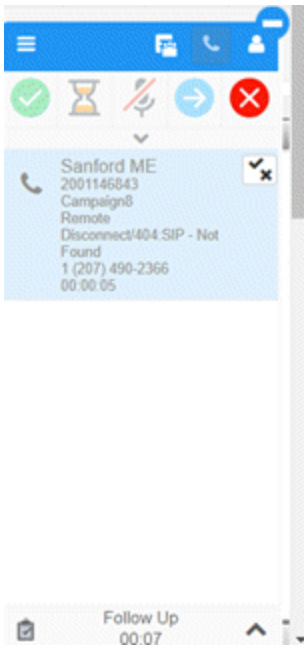
Interaction Dialer Campaigns

Disposition a Call (PureConnect)

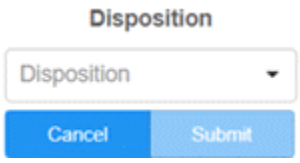
Use the **Disposition** dialog box to disposition a call. You can specify a disposition while on the call or immediately after ending the call. You won't receive more calls until you disposition the current call.

To disposition a call

1. Click the Disposition icon .



The **Disposition** dialog box appears.



2. In the **Disposition** list box, click the disposition to assign to the call and then click **Submit**. Latitude adds a note to the **Notes** panel.

Related Topics

PureConnect Dialer Agent Interface Icons

Interaction Dialer Campaigns

Request a Break (PureConnect)

Use the **Request Break** option to request a break to stop receiving campaign calls.

To request a break

- Do one of the following:
    - In the **PureConnect Dialer Agent Interface** toolbar, click the User icon and then click **Request Break**.
    - In the Status bar, click the arrow and then click **Request Break**.
    - In the **PureConnect Dialer Agent Interface** toolbar, click the Hamburger menu, click **Campaigns**, and then click **Request Break**.

You won't receive more calls until you end your break.

Related Topics

End Your Break (PureConnect)

PureConnect Dialer Agent Interface Icons

Interaction Dialer Campaigns

End Your Break (PureConnect)

Use the **End Break** option to end your break so that you can begin receiving calls again.

To end your break

- Do one of the following:
    - In the **PureConnect Dialer Agent Interface** toolbar, click the User icon and then click **End Break**.
    - In the Status bar, click the arrow and then click **End Break**.
    - In the **PureConnect Dialer Agent Interface** toolbar, click the Hamburger menu, click **Campaigns**, and then click **End Break**.

  You are now available to receive calls.

Related Topics

Request a Break (PureConnect)

PureConnect Dialer Agent Interface Icons

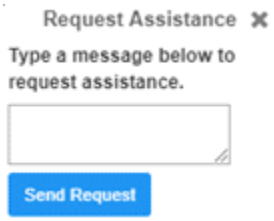
Interaction Dialer Campaigns

Request Assistance with a Call (PureConnect)

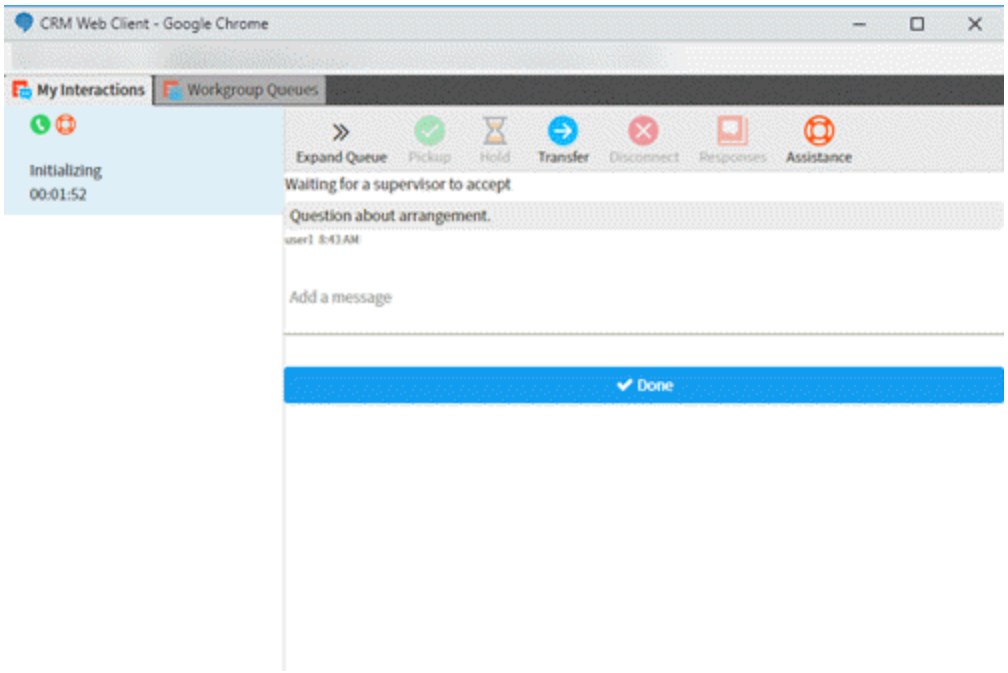
Use the **Request Assistance** dialog box to request assistance with a call.

To request assistance with a call

1. In the **PureConnect Dialer Agent Interface** toolbar, click the Request Assistance icon.



2. In the box, type a message to send regarding your request for assistance and then click **Send Request**. A supervisor receives your request for assistance.
3. To view the request, in the **PureConnect Dialer Agent Interface** toolbar, click the Workgroups icon. The **CRM Web Client** window appears.
4. Click the **My Interactions** tab.



Related Topics

PureConnect Dialer Agent Interface Icons

View Your Campaign Interactions (PureConnect)

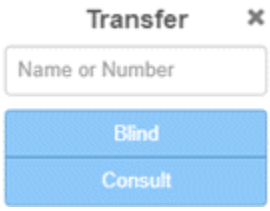
Interaction Dialer Campaigns

Transfer a Call (PureConnect)

Use the **Transfer** dialog box to transfer a call to another user, workgroup, or outside phone number.

To transfer a call

1. In the **PureConnect Dialer Agent Interface** toolbar, click the Transfer icon.



2. In the box, type the name of a user or workgroup, a user's phone number, or an outside party's phone number. As you type a user or workgroup name, matches from your Directory appear, along with the status. For example, a Phone icon indicates that the user is on a call.

3. Do one of the following:

   - To transfer the call without speaking to the recipient first, click **Blind**. Dialer connects the recipient to the call and disconnects you from the call.

   - To speak to the recipient before transferring the call, do the following:

     a. Click **Consult**. Dialer places the call that you are transferring on hold.

     b. Do one of the following:

- If the recipient answers and agrees to the transfer, click the Transfer icon again and then click **Complete**. Dialer connects the recipient to the call and disconnects you from the call.

- If the recipient doesn't answer or doesn't agree to the transfer, click **Disconnect**. Dialer disconnects the call to the recipient and takes the original call off hold.

Related Topics

PureConnect Dialer Agent Interface Icons

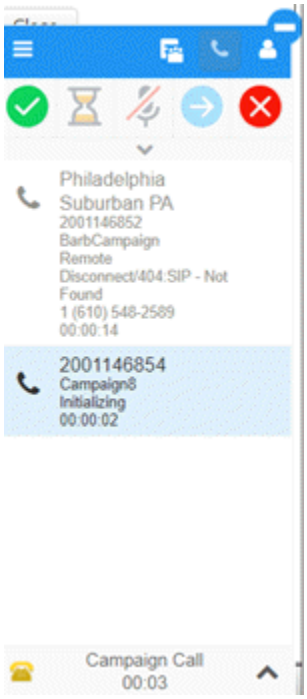
Interaction Dialer Campaigns

View Your Campaign Interactions (PureConnect)

Use the **Interactions** page to view your campaign interactions. Icons and other indicators show the status of the call, such as connected or on hold. Use the active icons in the **PureConnect Dialer Agent Interface** toolbar to act on an interaction, such as place or disconnect a call.

To view your campaign interactions

- In the **PureConnect Dialer Agent Interface** toolbar, click the Hamburger menu and then click **Interactions**.



Related Topics

PureConnect Dialer Agent Interface Icons

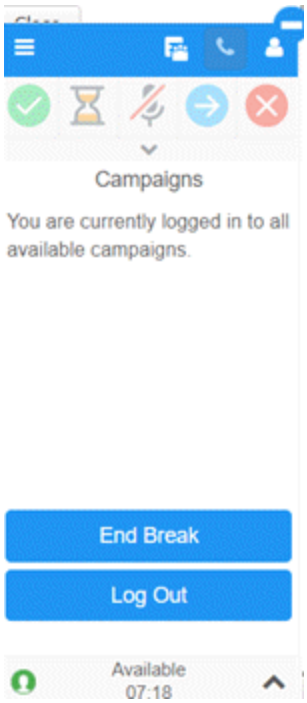
Interaction Dialer Campaigns

Log off a Campaign (PureConnect)

Use the **Campaigns** page to log off a campaign.

To log off a campaign

1. In the **PureConnect Dialer Agent Interface** toolbar, click the Hamburger menu and then click **Campaigns**.



2. Click **Logout**. The system logs you off the campaign.

Related Topics

Log on to a Campaign (PureConnect)

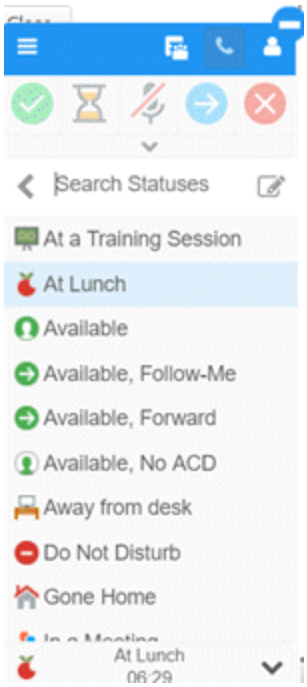
PureConnect Dialer Agent Interface Icons

Interaction Dialer Campaigns

Dialer User Statuses (PureConnect)

Dialer User Statuses (PureConnect)

The **PureConnect Dialer Agent Interface** includes a list of statuses from which you can choose to indicate your availability to receive campaign calls. Your ability to receive calls depends on your status. For more information about possible available statuses, see Possible Status Values in the *Interaction Client Help*.



Search Statuses: Allows you to search for a specific status.

Edit Status icon: Allows you to specify a note regarding your current status.

Available Statuses list: Statuses that are available to select.

Status bar: Displays your current status and the amount of time that you've been in that status.

Related Topics

Change Your Dialer Status (PureConnect)

Add a Note About Your Dialer Status (PureConnect)

Modify or Remove a Dialer Status Note (PureConnect)

View User Directory (PureConnect)

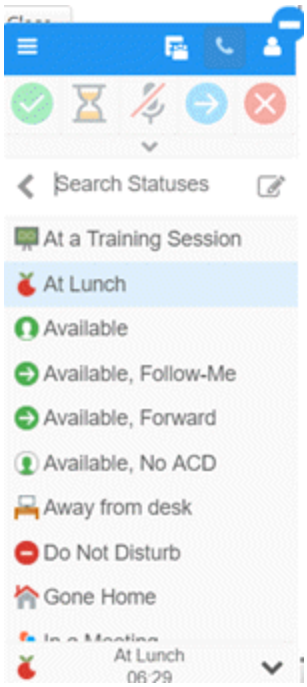
Change Your Dialer Status (PureConnect)

Use the **Status** page to change your status in the **PureConnect Dialer Agent Interface**.

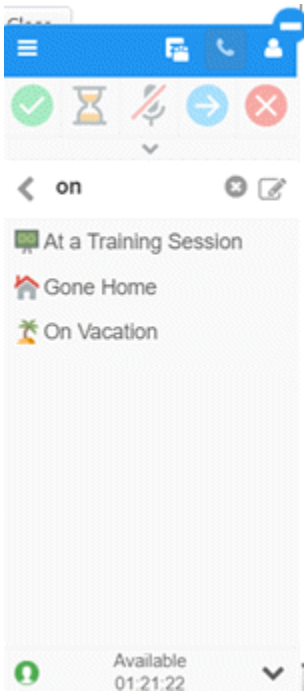
Note: If you are logged on to a campaign, you cannot change your status until you request a break. For more information, see Request a Break (PureConnect).

To change your Dialer status

1. On the status bar of the **PureConnect Dialer Agent Interface**, click the arrow next to your current status. A list of available statuses appears.

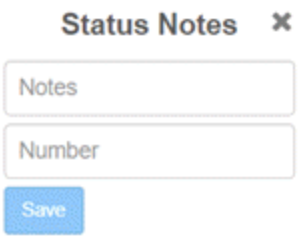


2. To search for a status, in the **Search Statuses** box, begin typing the status for which to search. Statuses that match your search criteria appear.



For more information about possible available statuses, see Possible Status Values in the *Interaction Client Help*.

3. Click a status. If you changed your status to "Available, Forward", the **Status Notes** dialog box appears.



4. If the **Status Notes** dialog box appears, do the following:

    a. In the **Notes** box, type a message regarding your status.

    b. In the **Number** box, type your forwarding phone number and then click **Save**.

Your status changes and the status timer restarts.

Related Topics

Add a Note About Your Dialer Status (PureConnect)

Modify or Remove a Dialer Status Note (PureConnect)

View User Directory (PureConnect)

Dialer User Statuses (PureConnect)

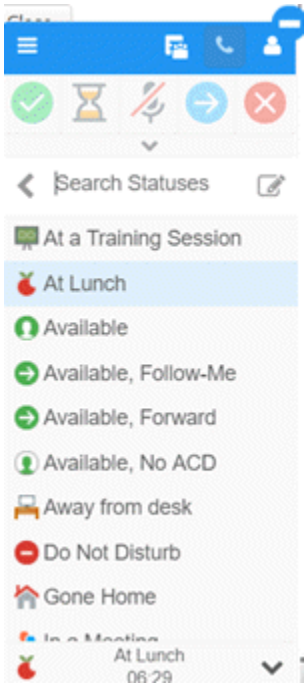
Add a Note About Your Dialer Status (PureConnect)

Use the **Status Notes** dialog box to add a message regarding your current Dialer status.

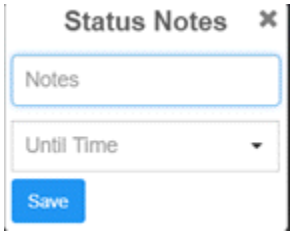
Note: If you are logged on to a campaign, you cannot add a note about your status until you request a break. For more information, see Request a Break (PureConnect).

To add a note about your Dialer status

1. On the status bar of the **PureConnect Dialer Agent Interface**, click the arrow next to your current status. A list of available statuses appears.



2. Next to the **Search Statuses** box, click the Edit icon. The **Status Notes** dialog box appears. The information that displays depends on your status.



3. In the **Notes** box, type a message regarding your status.

4. Specify the following data based on your status:

Status	Other Data to Provide
At a Training Session	**Until Date:** Date your status ends. **Until Time:** Time your status ends.
At Lunch	**Until Time:** Time your status ends.
Available, Follow Me	**Until Date:** Date your status ends.
Available, Forward	**Number:** Your forwarding phone number.
In a Meeting	**Until Date:** Date your status ends. **Until Time:** Time your status ends.
On Vacation	**Until Date:** Date your status ends.
Out of the Office	**Until Date:** Date your status ends. **Until Time:** Time your status ends.
Out of Town	**Until Date:** Date your status ends. **Until Time:** Time your status ends.

5. Click **Save**.

Note: Your status doesn't change automatically when this time ends. You must change your status manually.

6. To view the note, click the Hamburger menu and then click **Directory**. The **Directory** page appears, with your message and any other status data under your user ID.

Related Topics

Change Your Dialer Status (PureConnect)

Modify or Remove a Dialer Status Note (PureConnect)

View User Directory (PureConnect)

Dialer User Statuses (PureConnect)

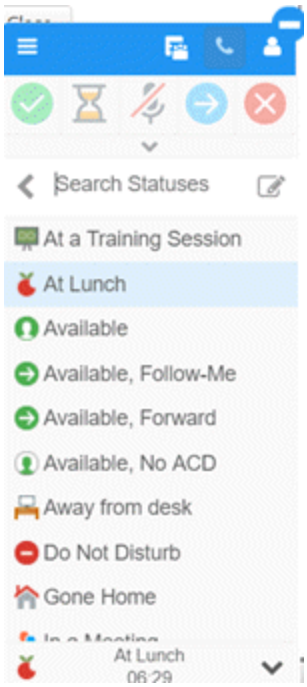
Modify or Remove a Dialer Status Note (PureConnect)

Use the **Status Notes** dialog box to modify or remove a message regarding your current status in the **PureConnect Dialer Agent Interface**.

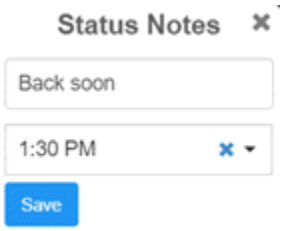
Note: If you are logged on to a campaign, you cannot modify or remove a note about your status until you request a break. For more information, see Request a Break (PureConnect).

To modify or remove a note about your Dialer status

1. On the status bar of the **PureConnect Dialer Agent Interface**, click the arrow next to your current status. A list of available statuses appears.



2. Next to the **Search Statuses** box, click the Edit icon. The **Status Notes** dialog box appears.



3. In the **Notes** box, do one of the following:
    - To change your message, type a new message regarding your status.
    - To remove your message, delete the text.
4. In the **Until Time** list box, do one of the following:
    - To change the end time, click the new end time for your status.
    - To delete the end time, click the **X**.
5. Click **Save**.

Related Topics

Change Your Dialer Status (PureConnect)

Add a Note About Your Dialer Status (PureConnect)

View User Directory (PureConnect)

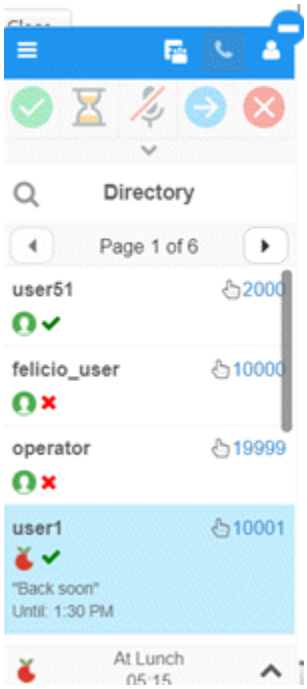
Dialer User Statuses (PureConnect)

View User Directory (PureConnect)

Use the **Directory** page to view a list of users who are logged on to Interaction Dialer.

To view the user directory

1. In the **PureConnect Dialer Agent Interface** toolbar, click the Hamburger menu and then click **Directory**.



   [User ID]: User name for the user logged on to Interaction Dialer.

   [Phone Extension]: User's phone extension number.

   [Current Status]: Icon that represents the user's current status in the **Dialer Agent Interface**. For example, the Apple icon indicates that the user is at lunch. For more information about these icons, see Dialer User Statuses (PureConnect).

   [Logged on Status]: Icon that represents whether a user is logged on or off. A green check mark indicates that the user is logged on. A red X indicates that the user is logged off.

   [Note]: Note the user added regarding the user's current status.

   [Status End Time]: Time that the user indicated that the status will end. The system doesn't change the status automatically when the status time ends. Users must change their status manually.

2. To call a user's extension, click the user's extension number. The system dials the user's extension number.

Related Topics

Change Your Dialer Status (PureConnect)

Add a Note About Your Dialer Status (PureConnect)

Modify or Remove a Dialer Status Note (PureConnect)

Dialer User Statuses (PureConnect)

Dialer Views (PureConnect)

Dialer Views (PureConnect)

Dialer provides options for the following:

- Viewing a list of users who are logged on to Interaction Dialer currently
- Viewing information about your recent incoming and outgoing calls
- Viewing information about your workgroup queues
- Viewing your open interactions

Related Topics

View a Workgroup Queue (PureConnect)

View Your Interactions (PureConnect)

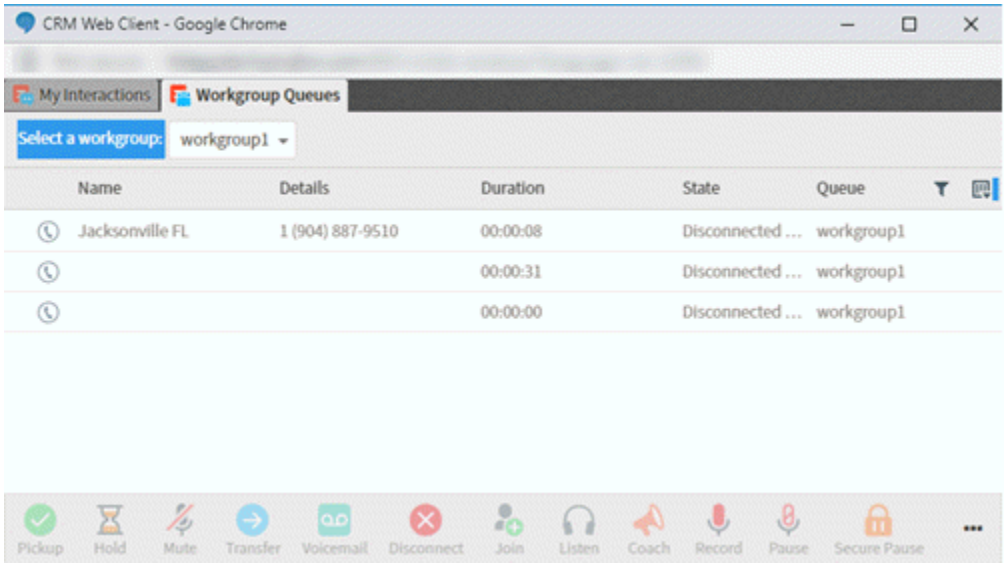
PureConnect Dialer Agent Interface

View a Workgroup Queue (PureConnect)

Use the **Workgroup Queues** tab in the **CRM Web Client** window to view information about your workgroup queues.

To view your workgroup queues

1. In the **PureConnect Dialer Agent Interface** toolbar, click the Workgroups icon. The **CRM Web Client** window appears.
2. Click the **Workgroup Queues** tab.



Related Topics

View Your Interactions (PureConnect)

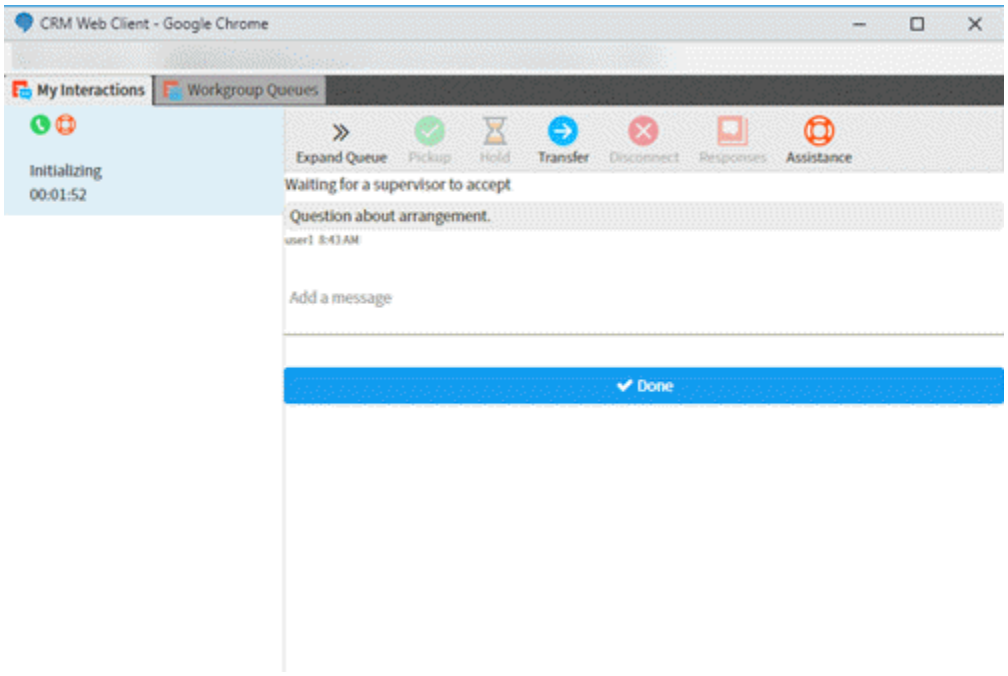
Dialer Views (PureConnect)

View Your Interactions (PureConnect)

Use the **My Interactions** tab in the **CRM Web Client** window to view your interactions, such as requests for assistance.

To view your interactions

1. In the **PureConnect Dialer Agent Interface** toolbar, click the Workgroups icon. The **CRM Web Client** window appears.
2. Click the **My Interactions** tab.



3. To close the request, click **Done**.

Related Topics

Request Assistance with a Call (PureConnect)

View a Workgroup Queue (PureConnect)

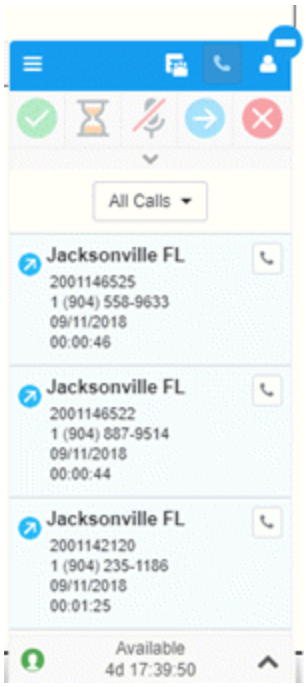
Dialer Views (PureConnect)

View Your Call History (PureConnect)

Use the **Call History** page to view your call history. You can view all your calls or just your missed, outgoing, answered, or forwarded calls.

To view your call history

- In the **PureConnect Dialer Agent Interface** toolbar, click the Hamburger menu and then click **Call History**.



[Location]: City and state associated to the phone number.

[Account Code]: Interaction Administrator account code to associate to the phone call. If not available, your organization doesn't use this code.

[Phone Number]: Phone number that you called, answered, missed, or forwarded.

[Date]: Date the call occurred.

[Call Duration]: Duration of the call (from connection to disconnection or transfer), in hours, minutes, and seconds.

Related Topics

PureConnect Dialer Agent Interface

Place an Outbound Call (PureConnect)

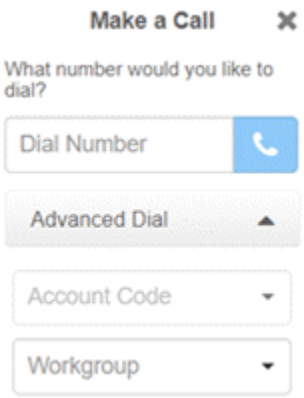
Use the **Make a Call** dialog box to place an outbound call.

To place an outbound call

1. In the **PureConnect Dialer Agent Interface** toolbar, do one of the following:

    - Click the Phone icon.
    - Click the Hamburger menu and then click **Make a Call**.

    The **Make a Call** dialog box appears.



Dial Number: Phone number to dial.

Account Code: Interaction Administrator account code to associate to the phone call. If not available, your organization doesn't use this code.

Workgroup: Workgroup to associate to the phone call.

2. Complete the information and then click the Phone icon to place the call.

Related Topics

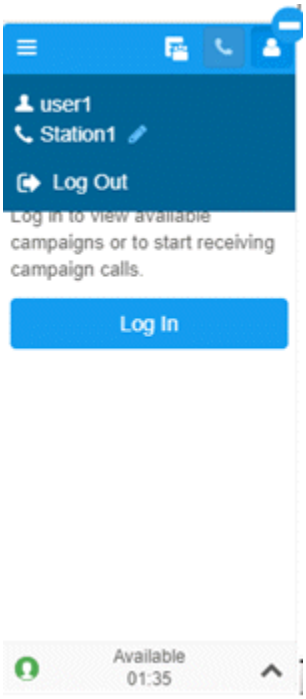
PureConnect Dialer Agent Interface

Change Your Station (PureConnect)

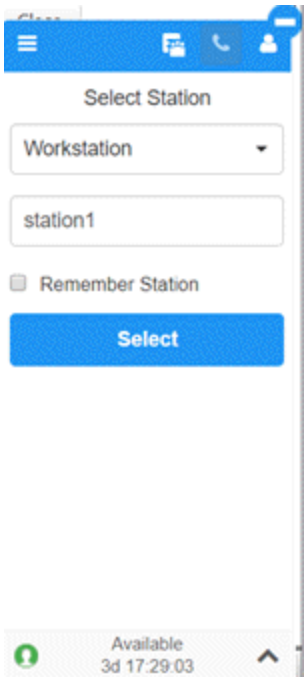
Use the **Select Station** page to change the station through which you receive calls.

To change your station

1. In the **PureConnect Dialer Agent Interface** toolbar, click the User icon.



2. Click the Edit icon next to the station. The **Select Station** page appears.



3. In the **Select Station** list box, click the type of station through which to receive calls.
4. Do one of the following:
    - If you selected **Workstation**, in the **Workstation** box, type the name of the workstation to use.
    - If you selected **Remote Workstation**, in the **Remote Workstation** box, type the name of the remote workstation to use. In the **Remote Number** box, type the remote telephone number to use.
    - If you selected **Remote Number**, in the **Remote Number** box, type the remote telephone number to use.

    For more information about stations, see "Overview of stations" in the *Interaction Administrator* documentation.
5. To use the same station each time you log on to Interaction Dialer, select **Remember Station**.
6. Click **Select**.

Related Topics

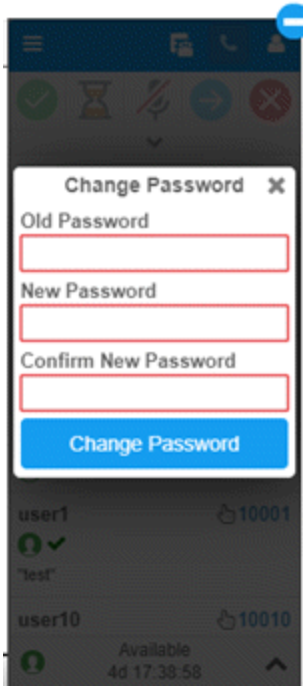
PureConnect Dialer Agent Interface

Change Your Dialer Password (PureConnect)

Use the **Change Password** dialog box to change your Interaction Dialer password.

To change your Dialer password

1. In the **PureConnect Dialer Agent Interface** toolbar, click the Hamburger menu and then click **Change Password**.



2. In the **Old Password** box, type your current Dialer password.
3. In the **New Password** box, type your new Dialer password.
4. In the **Confirm New Password** box, retype your new Dialer password.
5. Click **Change Password**.

Related Topics

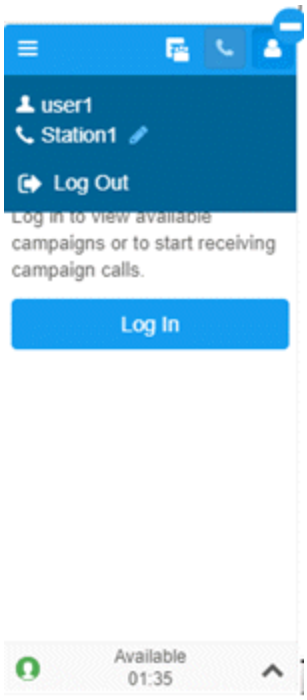
PureConnect Dialer Agent Interface

Log off PureConnect Dialer Agent Interface

Use the **User** menu to log off the **PureConnect Dialer Agent Interface**. You must log off all campaigns before you can log off the **PureConnect Dialer Agent Interface**.

To log off the PureConnect Dialer Agent Interface

1. In the **PureConnect Dialer Agent Interface** toolbar, click the User icon.



2. Click **Logout**. The system logs you out of the **PureConnect Dialer Agent Interface**.

Related Topics

Log on to PureConnect Dialer Agent Interface

PureConnect Dialer Agent Interface

Latitude Integration with Genesys Cloud

Latitude Integration with Genesys Cloud

The Latitude Integration with Genesys Cloud™ provides dialer capabilities inside Latitude through the Genesys Cloud client. This feature is available to Latitude clients who also have Genesys Cloud, a Genesys multi-tenant cloud solution. For more information about Genesys Cloud, see the Genesys Cloud Resource Center.

Integration features

The integration provides:

- Comprehensive multi-site campaign management.
- Campaign monitoring and compliance. The best defense against regulatory violations and fines is an effective compliance plan. With U.S. and international sales and collections regulations tools, Genesys Cloud helps your business keep campaign compliance in check.
- Skills-based dialing based on user skill level.
- Inbound and outbound call blending.
- Stage-based predicting using Genesys' patented predictive algorithm to elevate user productivity and contact success rates.

- Real-time connectivity to third-party Do Not Call (DNC) services, such as DNC.COM (Contact Center Compliance), and in-house DNC lists, to help ensure regulatory compliance.
- Real-time removal of duplicate numbers from campaign call lists to assist with State and Federal call compliance guidelines.
- Unidirectional exchange of relevant statistics and data, such as call results and acquired payments.

Latitude configuration

Following are the Latitude configurations for the Latitude Integration with Genesys Cloud.

- **Access DialerConfig permission:** Allows access to the Latitude Dialer Integration Configuration program to configure the dialer integration. For more information, see Access Dialer Config Permission.
- **Access ListBuilder permission:** Allows access to the List Builder program to create call lists for dialer campaigns. For more information, see Access List Builder Permission.
- **Dialer permission:** Specify the settings for displaying the Genesys Cloud client on the Agent Desktop. This permission includes the ability to map Genesys Cloud wrap-up codes to Latitude results codes. For more information, see Dialer Permission and Map a Disposition Code to a Result Code.
- **Phone Type Mapping permission:** Map phone types to action codes. For more information, see Phone Type Mapping Permission.
- **Reference Panels permission:** Select to display the **Communication** panel to allow users to view all communications associated to an account. Users can view historical communication for an account, play audio recordings associated to an account, and view letters associated to an account. For more information, see Reference Panels Permission and Communication.
- **Single-sign on (SSO):** Add a user's Genesys Cloud logon credentials to the user's Latitude account to allow Latitude to log the user on to the Genesys Cloud client without user intervention. For more information, see Add a User and Modify a User.

Other configurations

Other configurations include:

- **Browser**
  - Configure your browser to allow microphone use
- **Latitude Dialer Integration Configuration program**
  - Configure the Latitude database for dialer services
  - Configure real-time account removal
- **List Builder**
  - Configure the dialer server
  - Create and export call lists to create campaigns in Genesys Cloud
- **Genesys Cloud**
  - Create an OAuth client to allow Latitude APIs to communicate with the Genesys Cloud Platform API
  - Create an OAuth client to connect Genesys Cloud with your SSO service.
  - Configure Genesys Cloud for SSO.

- Create and configure queues that serve as containers for interactions that are waiting for collectors assigned to the queue.
- Create scripts that provide instructions to help collectors process interactions.

Important!
Calls won't connect unless you set the Microphone permission in your browser to **Allow**.

For more information about configuring the entire integration, see the *Latitude Integration with Genesys Cloud Installation and Configuration Guide* in the Latitude Documentation Library.

Related Topics

Genesys Cloud Client

Log on to Genesys Cloud Client

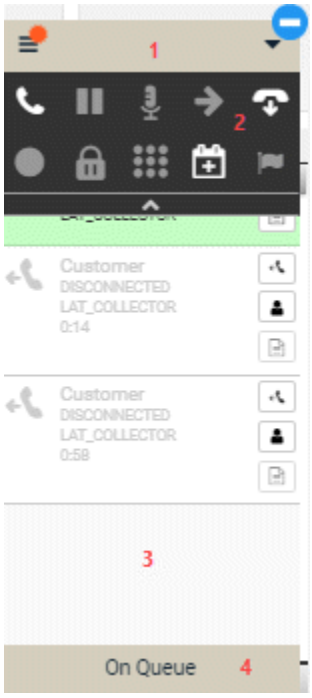
Campaign Call Process

Log off Genesys Cloud Client

Genesys Cloud Client

The Genesys Cloud client adds Dialer capabilities to Latitude for Genesys Cloud™ users, including campaign and manual dialing. The options available are based on your permissions.

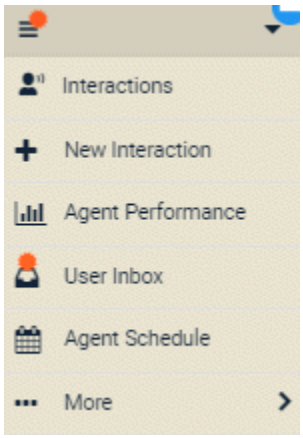
For a quick overview, watch this video!

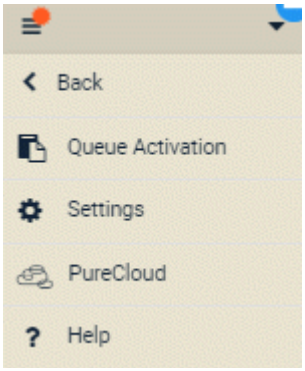


1. **Menu bar:** Provides access to two menus of options. For more information, see Client interface in the Genesys Cloud embedded clients in the Genesys Cloud Resource Center.

   Hamburger menu options

   Provides access to tasks, views, and settings. An orange burst indicates that your inbox contains new notifications.



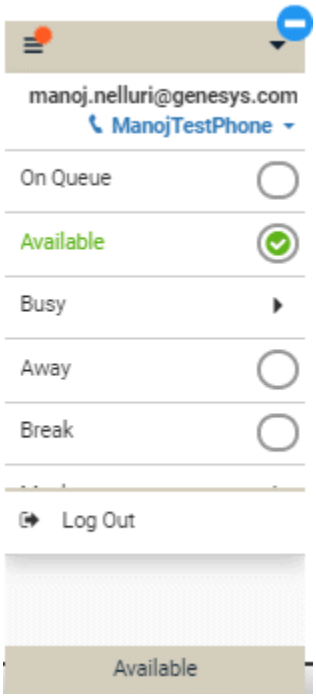


Option	Description
Interactions	View your active and recently disconnected interactions. For more information, see Interactions in the client menu in the Genesys Cloud Resource Center.
New Interaction	Place a call, send an email, or send an SMS message. For more information, see New Interaction in the client menu in the Genesys Cloud Resource Center.
Agent Performance	View your real-time statistics for voice, chat, email, and message interactions. For more information, see View agent performance statistics in the Genesys Cloud Resource Center.
User Inbox	View your call history, voicemails, evaluations, and work schedule notifications, such as shift trade and time off requests. For more information, see User Inbox in the client menu in the Genesys Cloud Resource Center.
Agent Schedule	View your work schedule (provided you have the appropriate permissions). For more information, see View your schedule in the Genesys Cloud Resource Center.
More	Display the next set of menu options.
Back	Display the previous set of menu options.
Queue Activation	If you have the appropriate permissions in Genesys Cloud, you can view your active and available queues. Active queues are the queues that you receive interactions from when you go on queue. Available queues are the queues that you do not receive interactions from when you go on queue. You can move an active queue to the Available Queues list and you can move an available queue to the Active Queues list. For more information, see Queue activation in the Genesys Cloud Resource Center.

Settings	View and configure your Genesys Cloud client settings, such as call forwarding and notifications. For more information, see Settings in the client menu in the Genesys Cloud Resource Center.
Genesys Cloud	Log on to Genesys Cloud, while remaining logged on to Latitude and the Genesys Cloud client. For more information, see Genesys Cloud in the client menu in the Genesys Cloud Resource Center.
Help	View the documentation for the Genesys Cloud client. Links to Help in the client menu in the Genesys Cloud Resource Center.

Arrow menu options

Allows you to change your status, change your phone, or log off the Genesys Cloud client.



Option	Description
Phone	Specify which phone to use when placing and receiving calls. For more information, see About phones in the Genesys Cloud embedded clients in the Genesys Cloud Resource Center.
Status	Change your primary (and in some cases, secondary) status. Your ability to receive interactions depends on your status. For more information, see Statuses in the Genesys Cloud Resource Center. **Important!** To participate in a campaign, you must set your status to **On Queue**.
Log Out	Log off the Genesys Cloud client. For more information, see Log off Genesys Cloud Client.

2. **Call Controls:** Displays the call controls that might be available, depending on your permissions and the interaction's current state. For more information, see Call Controls in the Genesys Cloud Resource Center.

Icon	Name	Description
	Pickup icon	Pick up an interaction.
	Hold icon	Place a call on hold.
	Mute icon	Mute a call.
	Transfer icon	Transfer an interaction.
	Disconnect icon	Disconnect an interaction.
	Record icon	Record a call that you place manually th the **Phones** panel. Call recordings are a **Communication** panel in Latitude. For m Play a Call Recording. **Note:** Call recording starts auto campaign dialing.
	Secure Pause icon	Pause a call recording. prevents the recording c information, such as a c **Note:** Secure pause isn't availabl for calls that you place manual through the interfac or the **Phones** panel. Howeve if you used th Record icon to start recordi the call, you can stop the recordi and the restart i when ready.

	DTMF icon	Open th a call to DTMF t connect options informa account card nu
	Schedule Callback icon	Display **callbac** allow yo callback interact outbour voicema
	Flag Voice Quality Issue icon	Flag vo (call, ca dialing, voicema issues s deterior unexpe disconn transfer

3. **Interactions:** Displays information about the current interaction, recent interactions, and other notifications. For more information, see Interactions in the client menu in the Genesys Cloud Resource Center.

4. **Status bar:** Displays your current status. When you click the Status bar, the same options appear as when you click the **Arrow** menu.

Related Topics

Log on to Genesys Cloud Client

Campaign Call Process

Log off Genesys Cloud Client

Latitude Integration with Genesys Cloud

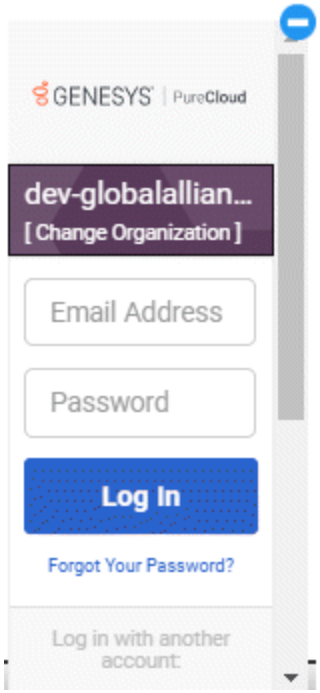
Log on to Genesys Cloud Client

Use the **Logon** pages to log on to the Genesys Cloud client. To use the client, your organization must have configured the Dialer permission.

Note: The options that appear depend on how your organization set up the Dialer permission and your user account.

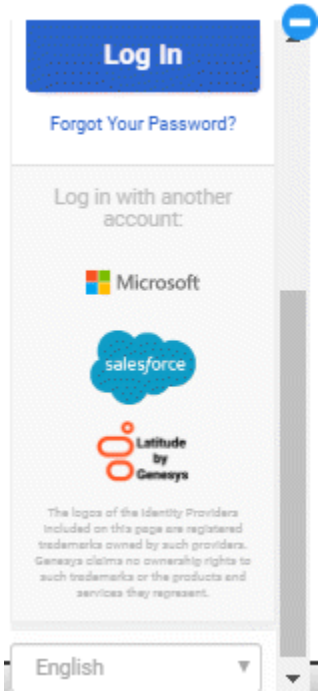
To log on to the Genesys Cloud client

1. Locate the Genesys Cloud client on the Latitude Agent Desktop.



2. Do one of the following:

   - If your Latitude account is not set up for single sign-on to the Genesys Cloud client, type your credentials in the **Email Address** and **Password** boxes and then click **Log In**.
   - If your Latitude account is set up for single sign-on to the Genesys Cloud client, scroll down to the bottom of the interface and then click **Latitude by Genesys**.



If your credentials are correct, Latitude logs you on to the Genesys Cloud client with a status of Available. Otherwise, an error message appears; provide the correct credentials or contact your system administrator for assistance.

Tip: To minimize the Genesys Cloud client, click the minus sign (-). The system minimizes the Genesys Cloud client and displays the Dialer icon .

Related Topics

Genesys Cloud Client

Campaign Call Process

Log off Genesys Cloud Client

Latitude Integration with Genesys Cloud

Campaign Call Process

Your organization creates campaigns and assigns agents to them to manage calling efforts. Each campaign contains a list of phone numbers to dial, based on a call list that your organization created in List Builder. Depending on the calling mode set for the campaign, the dialer places the calls automatically (Power or Predictive mode) or the agent chooses to place or skip the calls (Preview mode). Either an agent or the system dispositions every outbound call to indicate what happened. For example, the dialer dispositions unsuccessful contact attempts (such as busy, no answer, and SIT) automatically.

Note: If you configured real-time account removal in the Latitude Dialer Integration Configuration program, Latitude removes from call lists phone numbers dialed once already on the current day. This feature assists agents in complying with Do Not Call lists, and rules that prohibit companies from calling the same person multiple times a day.

Power or Predictive campaign

A Power campaign waits to dial a number in the call list until an agent is available to receive the call. A Predictive campaign dials several numbers in the call list simultaneously before an agent becomes available to receive the call. When a live person answers, the dialer directs the call to an available agent.

1. The agent changes their current status to **On Queue** to indicate that the agent is available to receive interactions.
2. The dialer displays a phone number from the campaign list in the Genesys Cloud client and places the call.
3. Latitude displays the relevant account in the **Work Form**.
4. The agent picks up the call.
5. When the call ends, the agent dispositions the call to classify it for reporting purposes.

Preview campaign

A Preview campaign allows an agent to view information about the party in the **Work Form** and then decide whether to place the call now or to skip it temporarily. Skipped calls remain in the queue.

1. The agent changes their current status to **On Queue** to indicate that the agent is available to receive interactions.
2. The dialer displays a phone number from the campaign list in the Genesys Cloud client but does not place the call.
3. Latitude displays the relevant account in the **Work Form**.
4. The agent does one of the following:
    - To place the call, the agent clicks the Pickup icon. The dialer places the call.
    - To skip the call, the agent clicks **Skip** in the Status bar. The dialer skips the call and displays the next number in the call list.
5. When the call ends, the agent dispositions the call to classify it for reporting purposes.

Related Topics

Genesys Cloud Client

Log on to Genesys Cloud Client

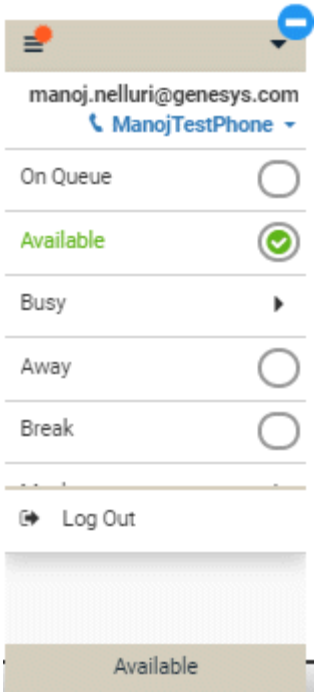
Log off Genesys Cloud Client

Latitude Integration with Genesys Cloud

Log off Genesys Cloud Client

Use the **Arrow** menu or **Status** bar to log off the Genesys Cloud client.

To log off the Genesys Cloud client



- Do one of the following:
    - Click the **Arrow** menu and then click **Log Out**.
    - Click the **Status** bar and then click **Log Out**.

  The system logs you off the Genesys Cloud client.

Related Topics

Genesys Cloud Client

Log on to Genesys Cloud Client

Campaign Call Process

Latitude Integration with Genesys Cloud

Feedback

Validate a Call

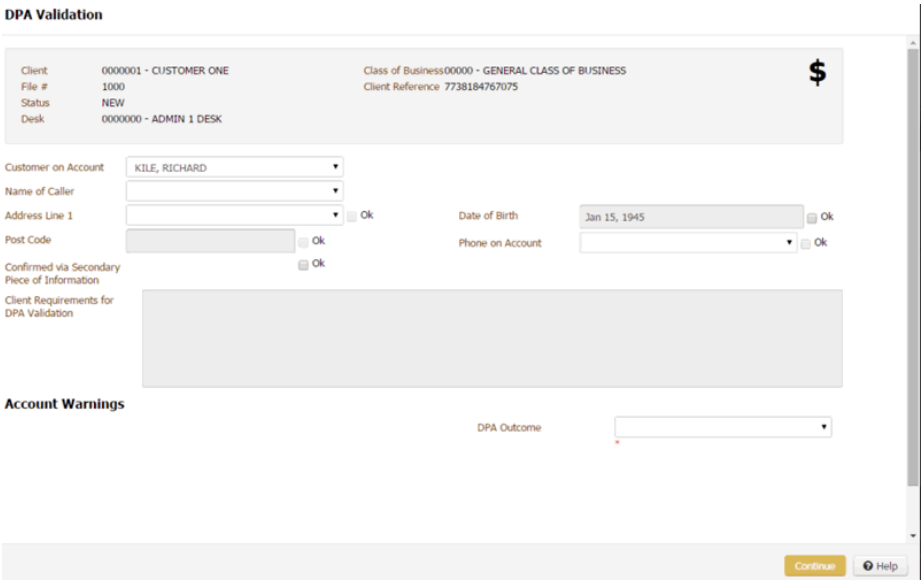
Use the **DPA Validation** dialog box to verify that you are speaking to the correct customer or authorized party before discussing the account. If your organization configured the system to require this validation, the system displays this dialog box automatically when you attempt to retrieve an account. You can also choose to display this dialog box at any time using the Account toolbar.

To validate a call

1. Do one of the following:
    - Retrieve an account using search, open interaction, work queue, history, or inventory.

- In the **Account** toolbar, click **DPA**.

The **DPA Validation** dialog box appears.



Client: Name of the client associated to the account.

File #: Unique code that the system assigned to identify the account.

Status: Three-character code that identifies the status of the account.

Desk: Desk assigned to the account.

Class of Business: Client's company type.

Client Reference: Unique code that the client assigned to identify the account.

Customer on Account: Name of the customer on the account.

Name of Caller: Name of the person on the phone.

Address Line 1: First line of the customer's address.

OK (Address Line 1): If selected, the address that the caller provided matches a value in the **Address Line 1** list box.

Post Code: Customer's postal code.

OK (Post Code): If selected, the postal code that the caller provided matches a value in the **Post Code** box.

Date of Birth: Customer's date of birth.

OK (Date of Birth): If selected, the postal code that the caller provided matches a value in the **Date of Birth** box.

Phone on Account: Phone number listed on the account.

OK (Phone on Account): If selected, the postal code that the caller provided matches a value in the **Phone on Account** list box.

Confirmed via Secondary Piece of Information: If selected, you confirmed the caller's information using resources other than Latitude.

Client Requirements for DPA Validation: Client requirements for data validation.

Account Warnings: Warning messages associated to the account.

DPA Outcome: Results of the validation. Valid values are:

Completed: Information the party provided is valid. The system displays the account.

RPC not made: (Right Party Contact). Party on the call is not the correct party. The system doesn't display the account.

Refused: Party on the call refused to verify the information. The system doesn't display the account.

Inconvenience: Party on the call indicated that it's not a convenient time to talk. The system doesn't display the account.

Failed: Information the party provided is not valid. The system doesn't display the account.

Bypass: You want to skip the validation process. The system displays the account.

Cancel: System cancels the validation process and doesn't display the account.

2. In the **Customer on Account** list box, click the customer on the account that the caller wants to discuss. The system populates the **Name of Caller** list box.
3. In the **Name of Caller** list box, click the name of the responsible party or authorized third party who is calling. The system populates the **Address Line 1**, **Postal Code**, **Date of Birth**, and **Phone on Account** boxes.
4. If the address that the collar provided is in the **Address Line 1** list box, click the address and then select the corresponding **OK** check box.
5. If the postal code that the caller provided matches the value in the **Post Code** box, select the corresponding **OK** check box.
6. If the date of birth that the caller provided matches the value in the **Date of Birth** box, select the corresponding **OK** check box.
7. If the phone number that the caller provided matches a value in the **Phone on Account** list box, click the phone number and then select the corresponding **OK** check box.
8. If you confirmed the caller's information using resources other than Latitude, select the **Confirmed via Secondary Piece of Information** check box.
9. If your organization configured client requirements for data validation, review the requirements in the **Client Requirements for DPA Validation** box.
10. In the **DPA Outcome** list box, click the results of the validation.
11. Click **Continue**. If you indicated that the information that the caller provided is valid, the account displays.

Related Topics

Configure Data Protection Validation Instructions Permission

Feedback

Display a Web Site on a New Browser Tab

If you have the Access Redirect Portal permission, you can display a web site that your organization specified in a new tab in your browser.

To display a web site on a new browser tab

- In the **Account** toolbar, click **Redirect to Portal**. The web site that your organization specified in the Access Redirect Portal permission displays on a new tab in your browser.

Related Topics

Access Redirect Portal Permission

Delinquency or Recovery Anchor

Delinquency or Recovery Anchor

Latitude displays either a **Delinquency** or **Recovery** anchor, depending on which anchor your organization specified in the Anchor Permission. These anchors contain "cards" of information. The cards that display depend on which ones your organization assigned to the anchor, and the account displayed currently. For example, the system only displays the **Account Placement** card when an outside collection agency holds the account and when your organization includes it in the anchor card.

The following cards could display on an anchor, depending on your system configuration:

- Account Labels Card
- Account Navigator Card
- Account State Card
- Account Status Card
- Account Summary Card
- AIM Card
- Charge-off Details Card
- Contact Card
- Delinquency Card
- First Party Active Collections Card
- Hot Notes Card
- Joined Accounts Card
- Link Summary Card
- Medical Account Details Card
- Party Card
- Party Navigator Card
- Pending Payments Card
- Support Queue Details Card

Related Topics

Anchor Permission

Anchors

Anchor Cards

Account Labels Card

Feedback

Account Labels Card

The **Account Labels** card allows you to define labels for whatever purpose you choose and use them to flag accounts. For example, you can use the labels as tags, conditions, or properties. You can assign multiple labels to an account. Account labels appear on the **Account Labels** card in the **Delinquency** or **Recovery** anchor.

You must have the Labels - User Policy Permission to view labels, add labels to accounts, create labels, and delete labels from accounts. You can use the Query Designer to query accounts that are associated to specific labels.

Related Topics

Create a Label

Add a Label to an Account

View Labels Associated to an Account

Delete a Label From an Account

Delinquency or Recovery Anchor

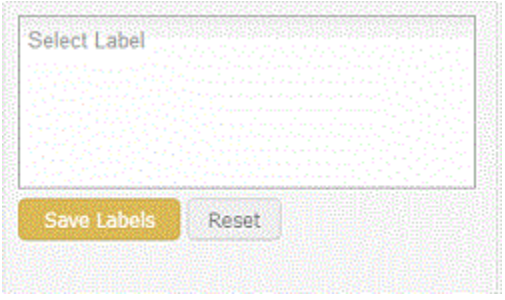
Feedback

Create a Label

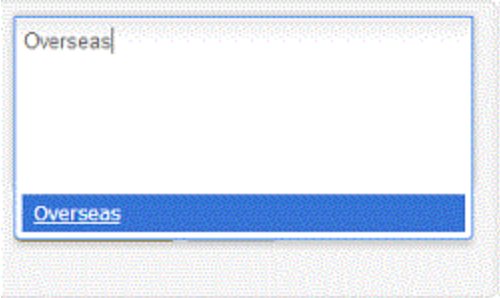
Use the **Account Label** card in the **Delinquency** or **Recovery** anchor to create a label that you can use to flag accounts.

To create a label

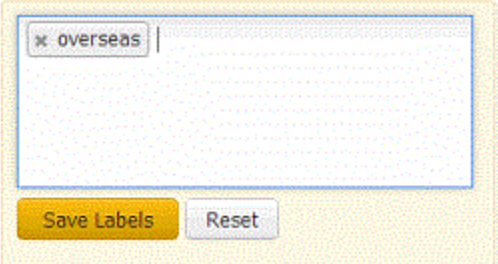
1. Locate the **Account Label** card.



2. In the **Select Label** box, type a label name to indicate the purpose of the label. A link appears in the lower section of the card.



3. Press **Enter**. The system adds the label to the **Account Label** card.



Tip: To cancel your changes, click **Reset**.

Related Topics

Account Labels

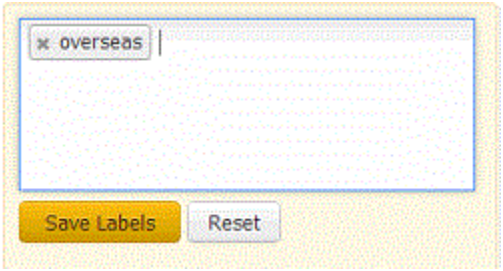
Feedback

Add a Label to an Account

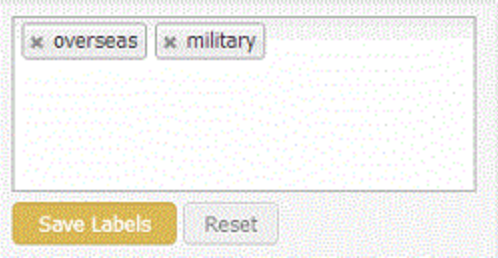
Use the **Account Label** card in the **Delinquency** or **Recovery** anchor to add an existing label to the account.

To add a label to an account

1. Locate the **Account Label** card**.**



2. In the **Select Label** box, begin typing a label name.
3. Click the label name and press **Enter**. The system adds the label to the account.



Tip: To cancel your changes, click **Reset**.

Related Topics

Account Labels

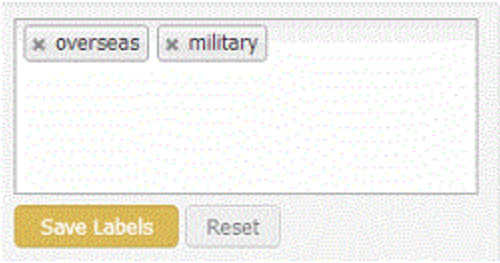
Feedback

View Labels Associated to an Account

Use the **Account Label** card in the **Delinquency** or **Recovery** anchor to view the labels associated to the account.

To view labels associated to an account

- Locate the **Account Label** card**.**



Related Topics

Account Labels

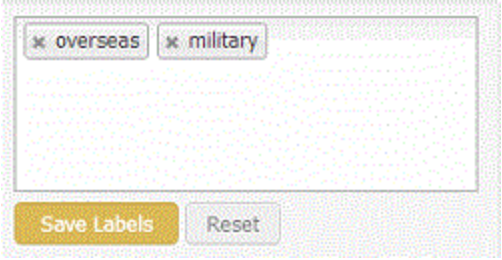
Feedback

Delete a Label From an Account

Use the **Account Label** card in the **Delinquency** or **Recovery** anchor to delete a label from the account.

To delete a label from an account

1. Locate the **Account Label** card**.**



2. Click the **x** next to the label to delete.

Tip: To cancel your changes, click **Reset**.

Related Topics

Account Labels

Feedback

Account Navigator Card

The **Account Navigator** card contains contact information for the parties on the account. The system displays each party on a separate tab within the card. The first tab displays the primary party on the account. Subsequent tabs display secondary parties on the account. Click a tab to display the account.

[Party]: Party's name. Click to view information for another party on the account.

[Address]: Party's street, city, state, and postal code.

[Email Address]: Party's email address.

Authorized for Customer: Customer who authorized this person to discuss the debt and pay on the account. This information appears when the **Is Responsible** check box is cleared.

If your organization placed a collection hold for a party on the account, a message displays in this card indicating that the customer is on hold.

Tip: To view the full contact name when it isn't visible, rest your mouse on the contact name.

Is Liable: If selected, the person is liable for the account and you can contact the person regarding the debt. If cleared, you cannot contact the person regarding the debt unless the primary party defaults on the arrangement.

Responsible: If selected, this person is responsible for the account. If the **[Party Name] is solely responsible** label appears instead, the named person has sole responsibility for the joint account.

Related Topics

Delinquency or Recovery Anchor

Place a Customer-Level Hold

Feedback

Account State Card

The **Account State** card displays information regarding the state of the account.

[Account Number]: Unique code that the client assigned to identify the account.

[Client]: Code that identifies the client, and the client's name. If the client's name exceeds 20 characters, you can rest your mouse on the name to see the full name.

[Status]: Status of the account. The status displays with a blue background for active accounts and a red background for closed accounts.

The card may also display the following information:

- Whether the account is residential or business.
- Last payment amount and date.
- Whether the system or a user canceled the account, and if so, the date and reason.

Related Topics

Delinquency or Recovery Anchor

Feedback

Account Status Card

The **Account Status** card displays the status information for the account.

Tip: To see a description of the status; queue level; branch; or desk, rest your mouse on the data next to the label.

File Number: Unique code that the system assigned to identify the account.

Status: Status of the account. The status displays with a blue background for active accounts and a red background for closed accounts.

Q-Level: Queue level assigned to the account.

Q-Date: Date the account queued.

Branch: Agency branch assigned to the account.

Desk: Desk assigned to the account.

Note: If your organization placed a hold on the account, a message displays indicating that the account is on hold. To view the hold expiration date and reason, rest your mouse on the hold message.

Related Topics

Delinquency or Recovery Anchor

Standard Queue Levels

Queue Level Codes

Place an Account-Level Hold

Feedback

Account Summary Card

The **Account Summary** card contains account information for the account.

Client: Code that identifies the client, and the client's name. If the client's name exceeds 20 characters, you can rest your mouse on the name to see the full name.

Client Account Number: Unique code that the client assigned to identify the account.

Original Creditor: Original creditor assigned to the account. If the client's name exceeds 20 characters, you can rest your mouse on the name to see the full name.

Date Last Paid Client: Date the client last received a payment.

Charge Off Date: Date the client charged off the account.

Received Date: Date your organization received the account.

Net Original Balance: Original balance of each money bucket, plus or minus adjustments.

Current Balance: Current account balance.

Last Payment: Last payment amount that the client received.

Last Worked: Date a user last worked the account.

Last Contacted: Date a user last contacted a party on the account.

Related Topics

Delinquency or Recovery Anchor

Feedback

AIM Card

The **AIM** card displays information regarding the outside collection agency or attorney holding the account.

Placed Date:	9/25/14
Days Placed / Level:	0 / 1
Agency ID:	1
Agency Name:	Collections Plus Services
Agency Address:	123 Collections Road Suite 262 Jacsonville, Florida 32256
Agency Email:	
Agency Phone:	904-555-2900
Agency Fax:	904-555-2901

Placed Date: Date the client placed the account with the outside collection agency.

Days Placed / Level: Number of days the outside collection agency has had the account.

Agency ID: Unique code that identifies the outside collection agency.

Contact Information: Name, mailing address, email address, phone number, and fax number of the outside collection agency.

Related Topics

Delinquency or Recovery Anchor

Placements and Recalls

Feedback

Charge-off Details Card

The **Charge-off Details** card displays charge-off information for the account.

Charge Off Amount: Amount of the debt that the client charged off.

Interest Since Last Charge Off: Interest that accrued after the client charged off the debt.

Last Worked: Date a user last worked the account.

Last Contacted: Date a user last contacted a party on the account.

Last Payment: Date the client last received a payment.

Total Paid: Total amount paid.

Current Balance: Current account balance.

Credit Balance: Overpayment amount. If the customer didn't pay more than the account balance, the system doesn't display this information.

Related Topics

Delinquency or Recovery Anchor

Feedback

Contact Card

The **Contact** card contains contact information for the customer on the account.

Customer: Customer's name.

Since: Date when the person became a customer and the type of account.

Account: Unique number that the client assigned to the account to identify it.

[Client Name]: Name of the client associated to the account. If the client name exceeds 20 characters, you can rest your mouse on the name to see the full name.

Address: Customer's address.

Email: Customer's email address.

Phone: Customer's telephone number.

Related Topics

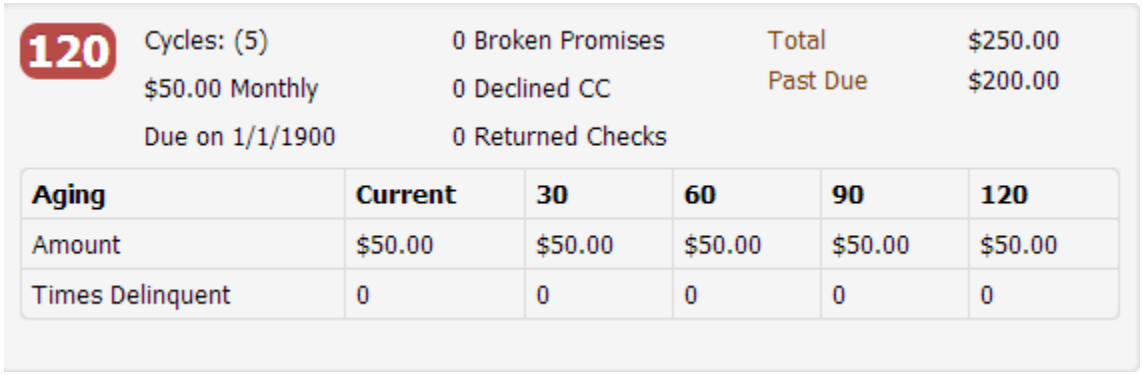
Delinquency or Recovery Anchor

Place a Customer-Level Hold

Feedback

Delinquency Card

The **Delinquency** card displays delinquency information for the account. The labels that appear in the data grid are based on how your organization configured the Delinquency Aging Bucket Labels Permission.



Aging	Current	30	60	90	120
Amount	$50.00	$50.00	$50.00	$50.00	$50.00
Times Delinquent	0	0	0	0	0

[Account Age]: Age of the account. If the account is 30 days past due, the age displays with a yellow background. If the account is 60 days past due, the age displays with an orange background. If the account is 90 days or more past due, the age displays with a red background.

Cycles: Number of billing cycles.

[Billing]: Recurring billing amount and frequency.

Due on: Payment due date.

Broken Promises: Number of broken promises.

Declined CC: Number of declined credit card transactions.

Returned Checks: Number of returned checks.

Total: Total account balance.

Past Due: Total amount past due.

Amount: Amounts that are due currently or past due for each of the aging buckets.

Times Delinquent: Number of times the account was past due for each of the aging buckets.

Related Topics

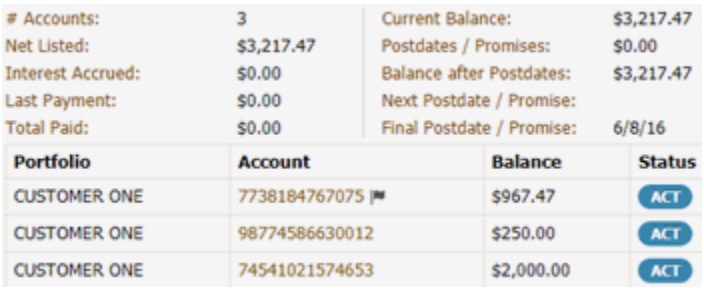
Delinquency or Recovery Anchor

Delinquency Aging Bucket Labels Permission

Feedback

First Party Active Collections Card

The **First Party Active Collections** card displays information regarding first-party active collections for the account.



# Accounts:	3	Current Balance:	$3,217.47
Net Listed:	$3,217.47	Postdates / Promises:	$0.00
Interest Accrued:	$0.00	Balance after Postdates:	$3,217.47
Last Payment:	$0.00	Next Postdate / Promise:	
Total Paid:	$0.00	Final Postdate / Promise:	6/8/16

Portfolio	Account	Balance	Status
CUSTOMER ONE	7738184767075	$967.47	ACT
CUSTOMER ONE	98774586630012	$250.00	ACT
CUSTOMER ONE	74541021574653	$2,000.00	ACT

 # Accounts: Number of accounts in the portfolio.

Net Listed: Net value of the accounts in the portfolio.

Interest Accrued: Interest accrued on the accounts in the portfolio.

Last Payment: Last payment amount on the accounts in the portfolio.

Total Paid: Total amount paid on the accounts in the portfolio.

Current Balance: Current balance of the accounts in the portfolio.

Postdates/Promises: Post-dated check and promise amounts for the accounts in the portfolio.

Balance After Postdates: Portfolio balance after subtracting post-dated checks.

Next Postdate/Promise: Next post-dated check or promise date.

Final Postdate/Promise: Final post-dated check or promise date.

Portfolio: Code that identifies the portfolio.

Account: Code that identifies an account in the portfolio.

Balance: Balance of the account.

Status: Status of the account.

Related Topics
Delinquency or Recovery Anchor

Hot Notes Card

Feedback

Hot Notes Card

The **Hot Notes** card allows you to add hot notes and standard notes to accounts.

Hot Notes

Hot notes display in the **Hot Notes** card and convey important information for working an account. The system retains the notes only until you clear the card. You can modify or delete hot notes that other users created.

Standard Notes

Standard notes display in the **Notes** panel. You use standard notes to track changes and save information about an account. The system retains the notes indefinitely. You cannot modify or delete standard notes.

Related Topics

Add a Hot Note to an Account

Add a Standard Note to an Account

Delinquency or Recovery Anchor

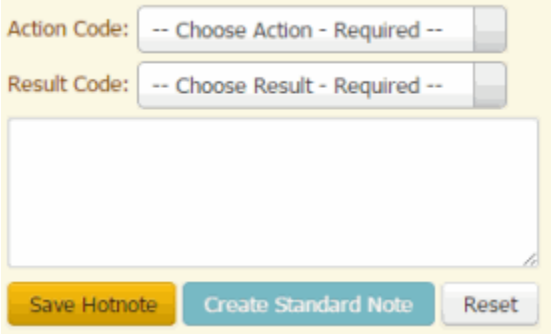
Feedback

Add a Hot Note to an Account

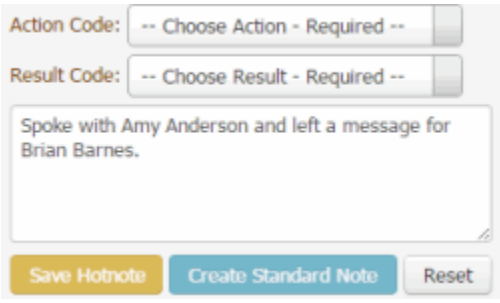
Use the **Hot Note** card in the **Delinquency** or **Recovery** anchor to add a hot note to the account.

To add a hot note to an account

1. Locate the **Hot Note** card**.**



2. In the **Action Code** list box, click the action on the account.
3. In the **Result Code** list box, click the result of the action.
4. In the **Note** box, type a note and then click **Save Hotnote**. The system adds the hot note to the account.



Tip: To cancel your changes, click **Reset**.

Related Topics

Add a Standard Note to an Account

Hot Notes

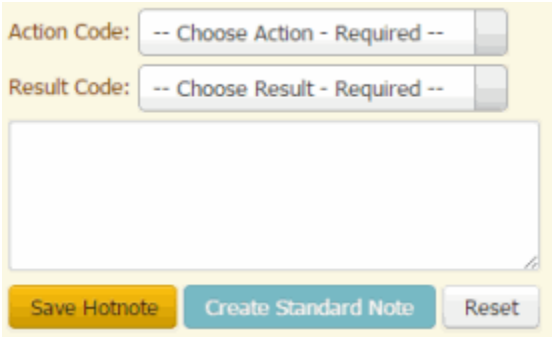
Feedback

Add a Standard Note to an Account

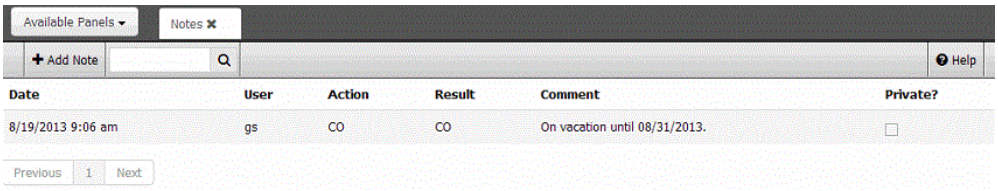
Use the **Hot Note** card in the **Delinquency** or **Recovery** anchor to add a standard note to the account. You cannot modify or delete standard notes. For more information, see **Notes**.

To add a standard note to an account

1. Locate the **Hot Note** card**.**



2. In the **Action Code** list box, click the action on the account.
3. In the **Result Code** list box, click the result of the action.
4. In the **Note** box, type a note and then click **Create Standard note**. The system adds the note to the **Notes** panel.



Tip: To cancel your changes, click **Reset**.

Related Topics

Add a Hot Note to an Account

Hot Notes

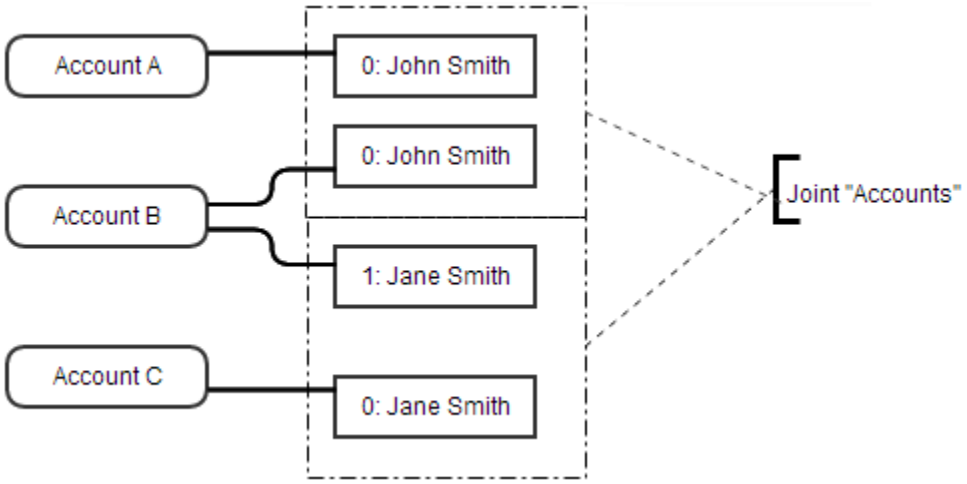
Notes

Joined Accounts

Feedback

Joined Accounts Overview

The "joined accounts" feature provides visibility into a specific party and the party's multiple accounts; a specific account and the account's multiple parties; and the navigation across both contexts. The following example shows John Smith associated to Account A and Account B. It shows Jane Smith associated to Account B and Account C. Finally, it shows John Smith and Jane Smith associated to each other through the shared Account B. When viewing Account B, you see two responsible parties. Selecting John Smith brings visibility to Account A and the responsibility to Account B. Selecting Jane Smith brings visibility to Account B and the responsibility to Account C.



Users can view a specific account and see that account's data and its related parties. They can also view a specific party and see the related accounts and a roll-up of the responsibility of those accounts. Data points like the total amount due differ based on which party that the user selected and the party's responsibilities.

Related Topics

Joined Accounts Card

Medical Account Details Card

Delinquency or Recovery Anchor

Feedback

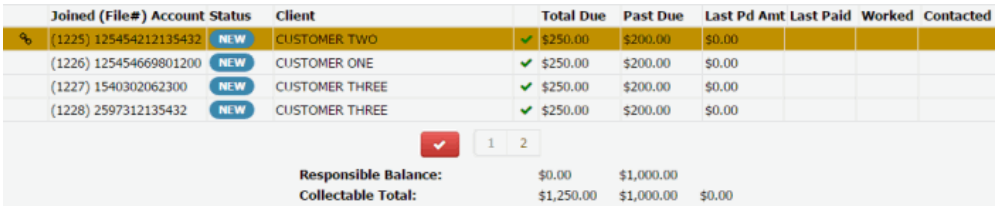
Joined Accounts Card

The **Joined Accounts** card displays the accounts associated to the responsible parties on the account. The information that appears on this card is based on whether the system is displaying the Delinquency or Recovery Anchor. Open accounts appear first, sorted by received date. If there are more than four accounts to display, the system includes pagination.

Notes:

- To display one of the joined accounts, click the account.
- If closed accounts are excluded from the list, a check mark in a red box appears (as shown in the example). To include closed accounts in the list, click the check mark in the red box. An **X** in a blue box appears in place of the check mark.
- If closed accounts are included in the list, an **X** in a blue box appears. To remove closed accounts from the list, click the **X** in the blue box. A check mark in a red box appears in place of the **X**.

Delinquency anchor - Joined Accounts card



Joined (File#) Account	Status	Client		Total Due	Past Due	Last Pd Amt	Last Paid	Worked	Contacted
(1225) 125454212135432	NEW	CUSTOMER TWO	✔	$250.00	$200.00	$0.00			
(1226) 125454669801200	NEW	CUSTOMER ONE	✔	$250.00	$200.00	$0.00			
(1227) 1540302062300	NEW	CUSTOMER THREE	✔	$250.00	$200.00	$0.00			
(1228) 2597312135432	NEW	CUSTOMER THREE	✔	$250.00	$200.00	$0.00			

1 2

Responsible Balance:	$0.00	$1,000.00	
Collectable Total:	$1,250.00	$1,000.00	$0.00

Joined (File #): Unique code that the system assigned to identify the account. If a Link icon displays next to an account, it indicates that the account is the driver (main) account in the group of joined accounts.

Account: Unique code that the client assigned to identify the account.

Status: Status of the account.

Client: Name of the client associated to the account.

Total Due: Total amount due on the account.

Past Due: Amount that is past due on the account.

Last Pd Amt: Amount last paid on the account.

Last Paid: Date of last payment on the account.

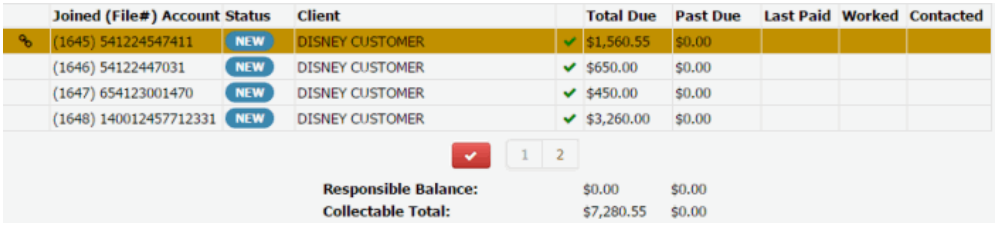
Worked: Date a user last worked the account.

Contacted: Date a user last contacted a party on the account.

Responsible Balance: Total due and total past due for only the accounts in the data grid for which the focused party is responsible.

Collectable Total: Total due, total past due, and total last paid amounts for all the accounts in the data grid, regardless of whether the focused party is responsible.

Recovery anchor - Joined Accounts card



Joined (File#) Account	Status	Client		Total Due	Past Due	Last Paid	Worked	Contacted
(1645) 541224547411	NEW	DISNEY CUSTOMER	✔	$1,560.55	$0.00			
(1646) 54122447031	NEW	DISNEY CUSTOMER	✔	$650.00	$0.00			
(1647) 654123001470	NEW	DISNEY CUSTOMER	✔	$450.00	$0.00			
(1648) 140012457712331	NEW	DISNEY CUSTOMER	✔	$3,260.00	$0.00			

1 2

Responsible Balance:	$0.00	$0.00
Collectable Total:	$7,280.55	$0.00

Joined (File #): Unique code that the system assigned to identify the account. If a Link icon displays next to an account, the account is the driver (main) account in the group of joined accounts.

Account: Unique code that the client assigned to identify the account.

Status: Status of the account.

Client: Name of the client associated to the account.

Total Due: Total amount due on the account.

Past Due: This amount is not applicable to recovery accounts so the value is always zero (0).

Last Paid: Date of last payment on the account.

Worked: Date a user last worked the account.

Contacted: Date a user last contacted a party on the account.

Responsible Balance: Total due for only the accounts in the data grid for which the focused party is responsible.

Collectable Total: Total due for all accounts in the data grid, regardless of whether the focused party is responsible.

Related Topics

Joined Accounts Overview

Delinquency or Recovery Anchor

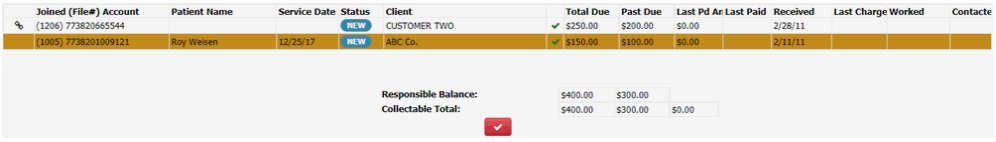
Medical Account Details Card

The **Medical Account Details** card displays for medical accounts associated to the responsible parties on the account. The information that appears on this card is based on whether the system is displaying the Delinquency or Recovery Anchor. Open accounts appear first, sorted by received date. If there are more than four accounts to display, the system includes pagination.

Notes:

- To display one of the joined accounts, click the account.
- If closed accounts are excluded from the list, a check mark in a red box appears (as shown in the example). To include closed accounts in the list, click the check mark in the red box. An **X** in a blue box appears in place of the check mark.
- If closed accounts are included in the list, an **X** in a blue box appears. To remove closed accounts from the list, click the **X** in the blue box. A check mark in a red box appears in place of the **X**.

Delinquency anchor - Medical Account Details card



Joined (File #): Unique code that the system assigned to identify the account. If a Link icon displays next to an account, it indicates that the account is the driver (main) account in the group of joined accounts.

Account: Unique code that the client assigned to identify the account.

Patient Name: Patient's name.

Service Date: Date the patient received medical care.

Status: Status of the account.

Client: Name of the client associated to the account.

Total Due: Total amount due on the account.

Past Due: Amount that is past due on the account.

Last Pd Amt: Amount last paid on the account.

Last Paid: Date of last payment on the account.

Received: Date your organization received the account.

Last Charge: Date the client last charged the account.

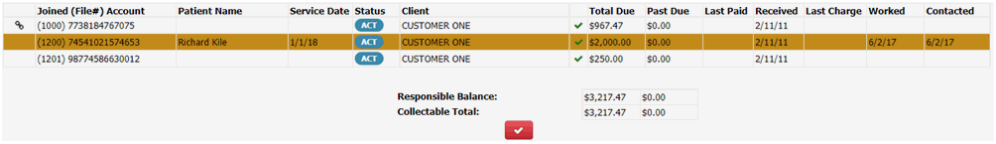
Worked: Date a user last worked the account.

Contacted: Date a user last contacted a party on the account.

Responsible Balance: Total due and total past due for only the accounts in the data grid for which the focused party is responsible.

Collectable Total: Total due, total past due, and total last paid amounts for all the accounts in the data grid, regardless of whether the focused party is responsible.

Recovery anchor - Medical Account Details card



Joined (File #): Unique code that the system assigned to identify the account. If a Link icon displays next to an account, the account is the driver (main) account in the group of joined accounts.

Account: Unique code that the client assigned to identify the account.

Patient Name: Patient's name.

Service Date: Date the patient received medical care.

Status: Status of the account.

Client: Name of the client associated to the account.

Total Due: Total amount due on the account.

Past Due: This amount is not applicable to recovery accounts so the value is always zero (0).

Last Paid: Date of last payment on the account.

Received: Date your organization received the account.

Last Charge: Date the client last charged the account.

Worked: Date a user last worked the account.

Contacted: Date a user last contacted a party on the account.

Responsible Balance: Total due for only the accounts in the data grid for which the focused party is responsible.

Collectable Total: Total due for all accounts in the data grid, regardless of whether the focused party is responsible.

Related Topics

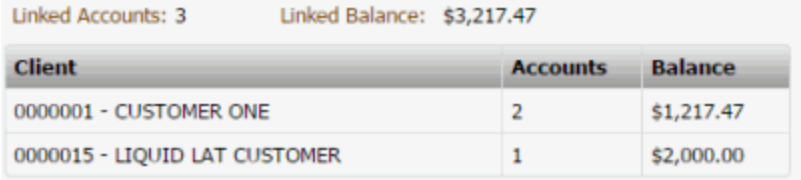
Joined Accounts Overview

Delinquency or Recovery Anchor

Feedback

Link Summary Card

The **Link Summary** card contains summary information for open accounts linked to the account. Linked accounts can belong to different clients.


Linked Accounts: 3 Linked Balance: $3,217.47

Client	Accounts	Balance
0000001 - CUSTOMER ONE	2	$1,217.47
0000015 - LIQUID LAT CUSTOMER	1	$2,000.00

Linked Accounts: Total number of accounts in the linked account group for all associated clients.

Linked Balance: Total balance of the accounts in the linked account group for all associated clients.

Client: Name of the client associated to the linked accounts.

Accounts: Number of accounts in the linked account group associated to the client.

Balance: Total balance of the accounts in the linked account group associated to the client.

Related Topics

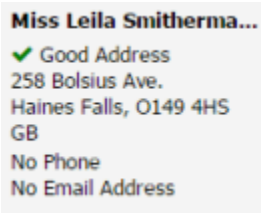
Data Grids

Delinquency or Recovery Anchor

Feedback

Party Card

The **Party** card contains contact information for a party on the account.



[Name] Party's name.

Address: Party's address.

Phone: Party's telephone number.

Email: Party's email address.

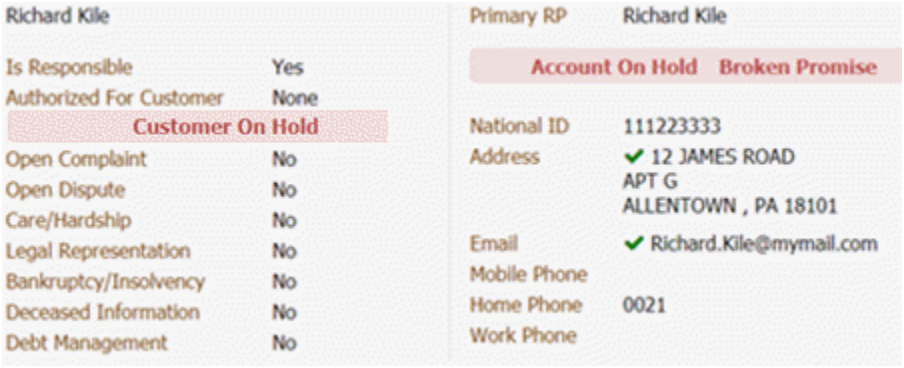
Related Topics

Delinquency or Recovery Anchor

Feedback

Party Navigator Card

The **Party Navigator** card contains information regarding a party on the account.



Column 1

[Name]: Name of a party on the account. If more than one party exists on the account, you can click the list box to select another party for whom to view information.

Is Responsible: Indicates whether the party is responsible for the account.

Authorized For Customer: Customer for whom the party is authorized to discuss the debt and pay on the account.

[Customer Alert]: If the customer is on hold, a "Customer On Hold" alert appears in red.

Tip: You can rest your mouse on the alert to view more information about it. For system-placed holds, the information displayed is the date the system placed the hold and the reason (for example, complaint). For user-placed holds, the information displayed is the hold expiration date and the reason the user provided when placing the hold. If both the system and a user placed a hold, the information that displays is for whichever hold occurred first.

Note: If any of the following are true, the verbiage appears in red.

Open Complaint: Indicates whether there is an open complaint on the account.

Open Dispute: Indicates whether there is an open dispute on the account.

Care/Hardship: Indicates whether there is a customer care or financial hardship case on the account.

Legal Representation: Indicates whether the account is in litigation.

Bankruptcy/Insolvency: Indicates whether there is a bankruptcy or insolvency on the account.

Deceased Information: Indicates whether a party on the account is deceased.

Debt Management: Indicates whether a party on the account engaged a Consumer Credit Counseling Service (CCCS) to negotiate settlement or payment arrangements on the debt.

Column 2

Primary RP: Name of the primary responsible party on the account.

[Account Alert]: If there are account alerts (for example, account is on hold or has a broken promise), the alerts appear in red.

Tip: You can rest your mouse on the alert to view more information about it. For example, if the account has a broken promise, the information displayed is the date the broken promise occurred and the promise amount. If a user placed the account on hold, the information displayed is the hold expiration date and the reason the user provided when placing the hold.

National ID: Unique number that the government issued to identify the party shown in column 1 of the card (for example, social security number or state ID).

Address: Mailing address of the party shown in column 1 of the card.

Email: Email address of the party shown in column 1 of the card.

Mobile Phone: Cell number of the party shown in column 1 of the card.

Home Phone: Home number of the party shown in column 1 of the card.

Work Phone: Work number of the party shown in column 1 of the card.

Note: If the party has multiple phone numbers of the same type (for example, work), the system displays only one phone number for that type. To view all phone numbers for the account, see View Phone Numbers for an Account.

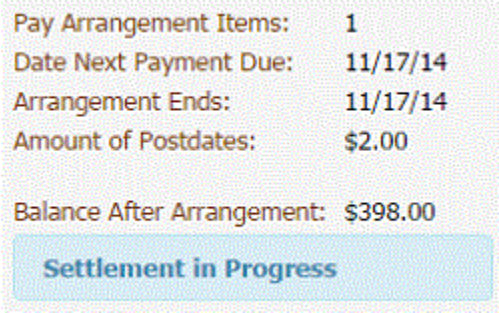
Related Topics

Delinquency or Recovery Anchor

Feedback

Pending Payments Card

The **Pending Payments** card displays pending payments for the account.



Pay Arrangement Items: Number of items in the payment arrangement.

Date Next Payment Due: Due date of the next payment in the arrangement.

Arrangement Ends: Date the payment arrangement ends.

Amount of Postdates: Total amount for all post-dated payments in the arrangement.

Balance After Arrangement: Account balance after the system applies the payments in the arrangement.

[Message area]: Messages about the arrangement, such as "Settlement in Progress" and "Broken Promise."

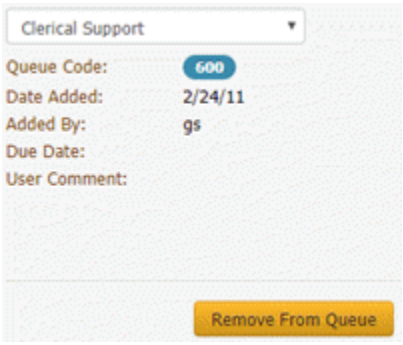
Related Topics

Delinquency or Recovery Anchor

Feedback

Support Queue Details Card

The **Support Queue Details** card displays support queue details for the account. This card displays for accounts assigned to any support queue, such as clerical or supervisor. If an account belongs to more than one support queue, you can select the queue to view.



Queue: Queue for which to display details.

Queue Code: Code that identifies the support queue.

Date Added: Date the user added the account to the support queue.

Added by: ID of the user who added the account to the support queue.

Due Date: Date the user requested a response to the support issue.

User Comment: Reason the user assigned the account to the support queue.

Remove From Queue: Removes the account from the queue specified in the **Queue** list box.

Related Topics

Delinquency or Recovery Anchor

Account Detail

Account Detail

You can view and modify account details using the **Account Detail** toolbar.

Related Topics

View Account Balance Details

View or Modify Account Dates

View Additional Information

View Contact Analysis Information

View Client Guidelines

View Information for Linked Accounts

Feedback

View Account Balance Details

Use the **Balance Details** panel to view account balance details for the account. The information that appears on this panel is based on whether the account is a delinquency or recovery account.

To view account balance details

- In the **Account Detail** toolbar, click **Balance Details**. One of the following occurs:
    - For an account that the client charged off, the current balance information appears.
    - For an account that the client didn't charge off, the history balance information appears.

Current Balance

The **Current Balance** panel shows the amounts for each money bucket for recovery accounts.

Current Balance

	Original	Adjusted	Net Original	Accrued	Paid	Current
Principal	$292.87	$0.00	$292.87	$0.00	$0.00	$292.87
Interest	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Collection Costs	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Bad Check Chgs	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Court Cost	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Attorney Fees	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Misc	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Not Used	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Not Used	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Transaction Charges	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Total	$292.87	$0.00	$292.87	$0.00	$0.00	$292.87
						Overpaid
Amount:						$7.13

Help

Money buckets: (Rows) Categories used to group amounts associated to the account (for example, principal and interest).

Original: Balance of each money bucket on the day your organization received the account.

Adjusted: Amount the system or user adjusted each money bucket after your organization received the account.

Net Original: Original balance of each money bucket, plus or minus adjustments.

Accrued: Accrued interest (calculated interest, transaction fees).

Paid: Payment amounts received for each money bucket after your organization received the account.

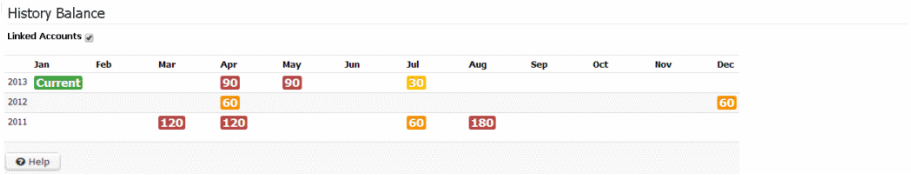
Current: Current balance of each money bucket.

Total: (Last row) Total amounts for each of the columns.

Overpaid: Amount overpaid on the account (account balance less the amount paid).

History Balance

The **History Balance** panel shows account aging information by month and year for delinquency accounts.



Linked Accounts: If selected, linked accounts are included in the panel.

Related Topics

Account Detail

Maintain Money Titles

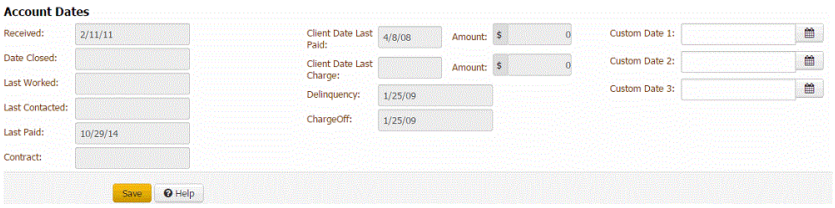
Feedback

View or Modify Account Dates

Use the **Account Dates** panel to view important dates associated to the account. To modify custom dates, you must have the Update User Date 1 Permission, Update User Date 2 Permission, and Update User Date 3 Permission.

To view or modify account dates

1. In the **Account Detail** toolbar, click **Major Dates**.



Received: Date your organization received the account.

Date Closed: Date the system or a user closed the account.

Last Worked: Date the user last worked the account.

Last Contacted: Date your organization last contacted the customer.

Last Paid: Date your organization last received a payment.

Contract: Date the customer started the account with the client.

Client Date Last Paid: Date the client last received a payment.

Amount: (Client Date Last Paid Amount) Payment amount that the client reported as last received on the account.

Client Date Last Charge: Date the client last charged the account.

Amount: (Client Date last Charge Amount) Amount the client last charged the account.

Delinquency: Date the account became delinquent.

Charge Off: Date the client charged off the account.

Custom Date 1 through **Custom Date 3:** A user-defined date. The labels differ, depending on how your organization configured your system.

First Assigned to Desk: Date the account was first assigned to the desk.

Viewed: Number of times the account was viewed.

Worked: Number of times the account was worked.

Contacted: Number of times the customer was contacted about the account.

2. If you have the permissions to modify the user dates, complete the information and then click **Save**.

Related Topics

Account Detail

Update User Date 1 Permission

Update User Date 2 Permission

Update User Date 3 Permission

Maintain Account Titles

Feedback

View Additional Account Information

Use the **Additional Info** panel to view miscellaneous account information for the account.

To view additional account information

- In the **Account Detail** toolbar, click **Additional Information**.

Account Type

Class: Class of business assigned to the account for reporting to credit bureaus.

Claim Type: Claim type that the system uses to determine the statute of limitations.

Account IDs

Original: Account ID the creditor assigned to the account originally.

Secured Loan: If selected, the customer pledged collateral against the loan.

ID 1: User-defined account identification.

ID 2: User-defined account identification.

Creditors

Original: Original creditor assigned to the account.

Previous: Creditor previously assigned to the account.

Interest

Rate: Interest rate of the loan.

Date Assessed: Date the client assessed interest.

Client: Client associated to the account.

Division: Client's division.

District: Client's district.

Branch: Client's branch.

Related Topics

Account Detail

Claim Types

Feedback

View Contact Analysis Information

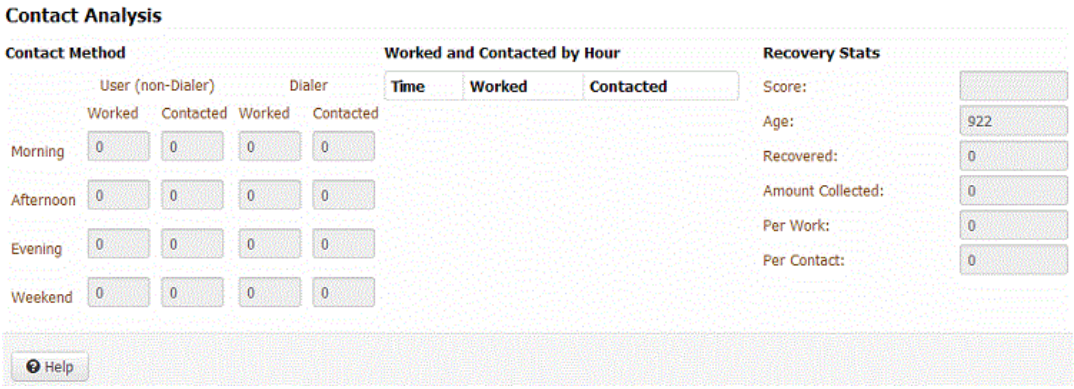
Use the **Contact Analysis** panel to verify the number of times each day that your organization attempted to contact the customer regarding the account. You can use this information to determine what time to set up a reminder. If successful contact was made during a particular time, you can set a reminder to call again at that same time.

The system displays the following information:

- Morning, afternoon, evening, and weekend contacts by both a user and a dialer.
- Scoring information that the system imported (custom interfaces only.)
- Number of days that your organization has held the account.
- Percentage of the balance currently recovered.
- Total amount collected, with the average amount collected each time your organization contacted the customer or worked the account.

To view contact analysis information

- In the **Account Detail** toolbar, click **Contact Analysis**.



User (non-Dialer) Worked (Morning, Afternoon, Evening, Weekend): Number of times users worked the account during the specified time of day.

User (non-Dialer) Contacted (Morning, Afternoon, Evening, Weekend): Number of times users contacted someone regarding the account during the specified time of day.

Dialer Worked (Morning, Afternoon, Evening, Weekend): Number of times that the dialer worked the account during the specified time of day.

Dialer Contacted (Morning, Afternoon, Evening, Weekend): Number of times that the dialer contacted someone regarding the account during the specified time of day.

Time: Hour of day the user worked the account or contacted someone regarding the account.

Worked: Number of times the user worked the account at the specified time of day.

Contacted: Number of times the user contacted someone regarding the account at the specified time of day.

Score: Indicates how collectable the account is. This information comes from a file that your organization receives from an outside vendor.

Age: Number of days your organization has held the account.

Recovered %: Percent of the account balances that your organization received in payments.

Amount Collected: Total amount collected on the accounts.

Per Work: Total amount collected for worked accounts.

Per Contact: Total amount collected for contacted accounts.

Related Topics

Account Detail

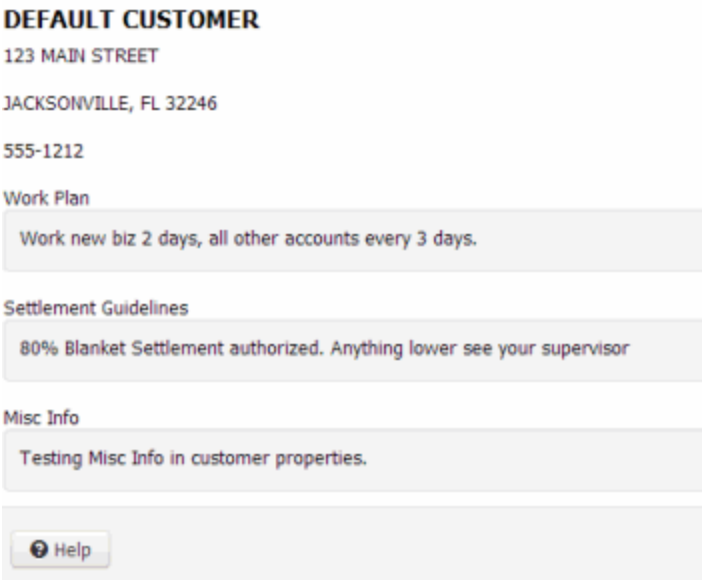
Feedback

View Client Guidelines

Use the **Client Guidelines** panel to view the work plan, settlement guidelines, and miscellaneous information for the client on the account. Your organization specifies this information when setting up a client. For more information, see Maintain Client Guidelines.

To view client guidelines

- In the **Account Detail** toolbar, click **Client Guidelines**.



Work Plan: Displays a work plan for the account.

Settlement Guidelines: Displays settlement guidelines for the account.

Miscellaneous Information: Displays miscellaneous information for working an account.

Related Topics

Account Detail

Maintain Client Guidelines

Feedback

View Information for Linked Accounts

Use the **Link Details** panel to view information about accounts that are linked to the account. Linked accounts can belong to different clients.

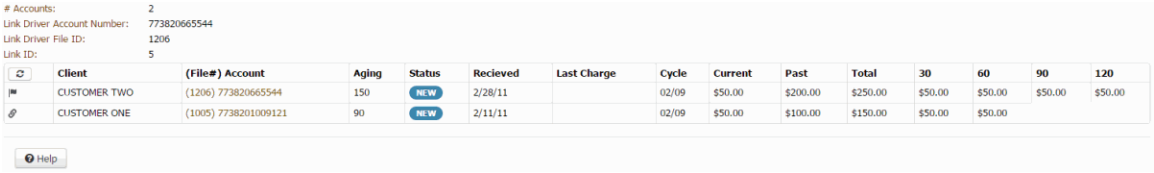
To view information for linked accounts

1. In the **Account Detail** toolbar, click **Link Details**. One of the following occurs:
   - For a first-party active collections account, the first-party active collections information appears.
   - For a first-party recovery or third-party collections account, the first-party recovery or third-party collections information appears.

   Note: To display a linked account, in the Account column, click the account number.
2. To refresh the data in the data grid, click the Refresh icon in the first column and of the data grid's header row.

First-party active collections

The first-party active collections anchor shows aging information for each linked account.



 # Accounts: Number of accounts in the linked account group, including the driver account.

Link Driver Account Number: Unique code that the client assigned to identify the link driver account. In the data grid, a Flag icon signifies the driver account and a Chain Link icon signifies a linked account.

Link Driver File ID: Unique code that the system assigned to identify the link driver account.

Link ID: Unique number that identifies the linked account group.

Client: Name of the client on the account.

(File #) Account: Unique code that the client assigned to identify the account.

Aging: Age of the account, which is the greatest number of days the account is past due.

Status: Status of the linked account.

Received: Date your organization received the account.

Last Charge: Amount the client last charged the account.

Cycle: Date the account's next billing cycle begins.

Current: Amount that is not yet due.

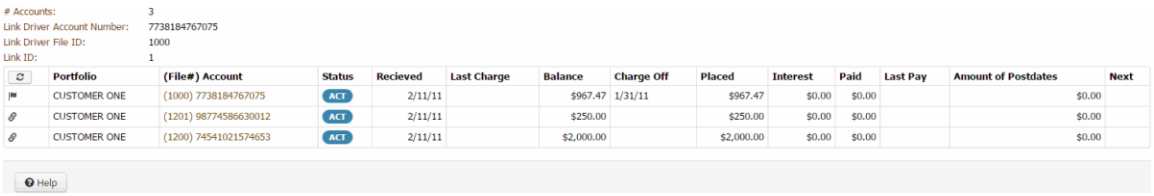
Past: Total amount that is past due on the account.

Total: Total amount due on the account. This amount is the sum of the current and total amounts.

[Delinquency Aging Buckets]: Time periods for reporting past due amounts. In the example, the labels are 30, 60, 90, and 120. Your organization defines these labels. For more information, see the Delinquency Aging Bucket Labels permission.

First-party recovery or third-party collections

The first-party recovery or third-party collections anchor shows account balance and payment information for each linked account.



 # Accounts: Number of accounts in the linked account group, including the driver account.

Link Driver Account Number: Account number for the main account in the linked accounts group. In the data grid, a Flag icon signifies the driver account and a Chain Link icon signifies a linked account.

Link Driver File ID: Unique number the system assigned to the link driver account to identify it.

Link ID: Unique number that identifies the linked account group.

Client: Name of the client on the account.

(File #) Account: Account number that the client assigned to the account.

Status: Status of the linked account.

Received: Date your organization received the account.

Last Charge: Amount the client last charged the account.

Balance: Account balance.

Charge Off: Date the client charged off the account.

Placed: Amount on the account that the client placed with an outside agency.

Interest: Interest on the account.

Paid: Amount paid on the account.

Last Pay: Last payment date.

Amount of Postdates: Post-dated check and promise amount.

Next: Next payment date.

Related Topics
Data Grids

Account Detail

Account Links

Feedback

Account Links

Linked accounts are separate accounts that your organization holds for the same responsible party. Link Console links accounts for the same party automatically based on criteria that your organization configured in Link Console. The Manage Links feature in Latitude allows you to add and remove links manually. You can link an account to an existing party on another account, create a party to link to, and remove account links. Latitude considers all parties in the link group to be the same person.

Data merge

When you link parties, Latitude merges the following data:

- Address records
- Email address records
- Care and financial hardship records (uses the data changed most recently as the current data)
- Income and expenditure records (uses the data changed most recently as the current data)
- Complaint records (uses the data changed more recently as the current data)

Related topics
Add a Link to an Account

Remove all Links to an Account

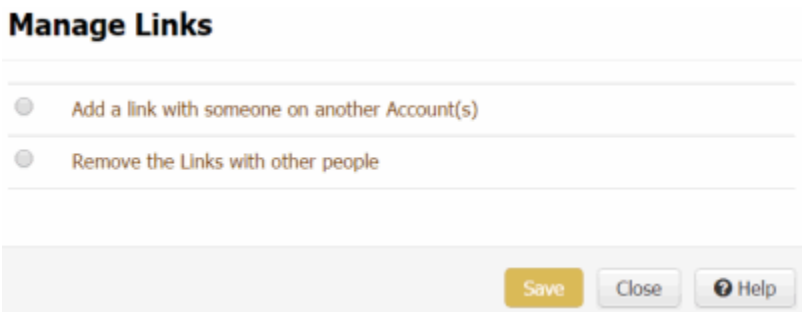
Feedback

Add a Link to an Account

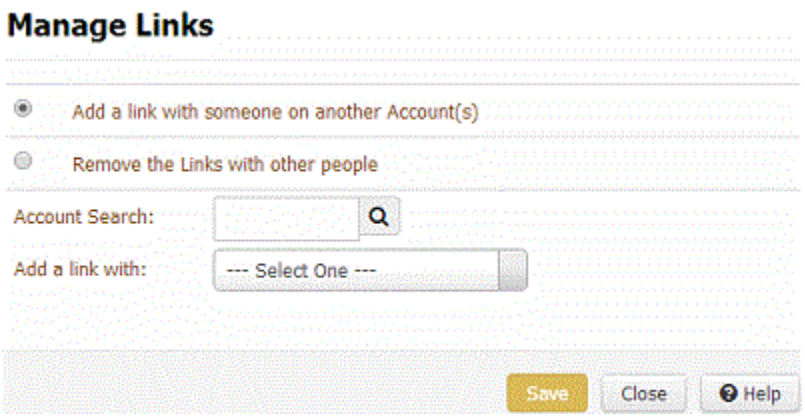
Use the **Manage Links** dialog box to link a party to the account. You can link to an existing party or create a party to link to. You must have the Allow Manual Linking/Unlinking Permission.

To add a link to an account

1. In the **Account** toolbar, click **Linking**.



2. Click **Add a link with someone on another account**.



3. In the **Account Search** box, type the file number to search for and then click the Search icon. If an account matches the specified file number, Latitude populates the list box with the parties associated to the matching account.

4. Do one of the following:

- To link to a party displayed in the **Add a link with** list box, click the party's name and then click **Save**. One of the following occurs:
  - If a party that you are linking has an active arrangement, a message displays indicating that you cannot create a link. Click **Close**.
  - If an account in a linked group has a court case, a message displays indicating that you cannot create a link. Click **Close**.
  - If the party that you selected to link to is linked to other parties, a message displays asking whether you want to link all the parties. To link all the parties, click **OK**. Latitude links the parties and merges certain data. To close the dialog box without linking the parties, click **Cancel**.
  - If no messages display, Latitude links the parties and merges certain data.

- To create a party to link to, in the **Add a link with** list box click **None (create a record)** and then click **Save**. Latitude creates a party with the same name as the account displayed currently and links to that party. Latitude merges certain data with the new party. Use the **Customers** panel to update other data for the party as necessary. For more information, see Customers.

Note: For more information about what data Latitude merges, see Account Links.

Related Topics

Account Links

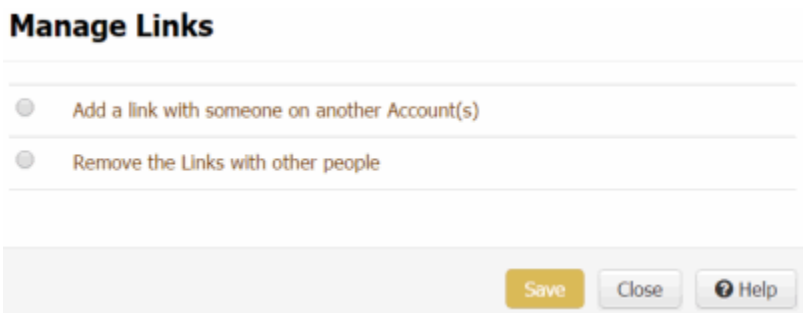
Feedback

Remove all Links to an Account

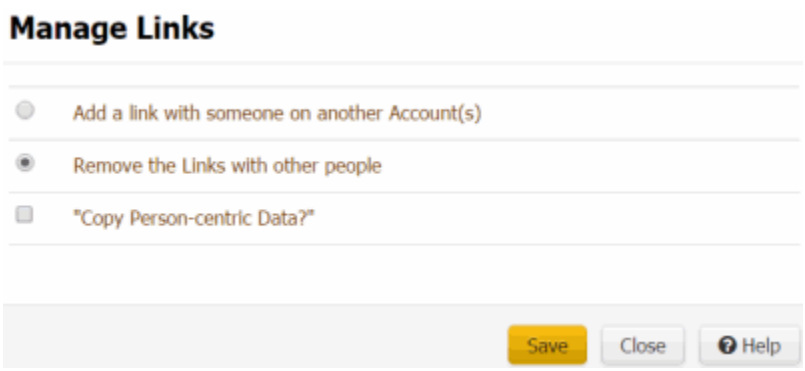
Use the **Manage Links** dialog box to remove all party links to the account. You must have the Allow Manual Linking/Unlinking Permission.

To remove all links to an account

1. In the **Account** toolbar, click **Linking**.



2. Click **Remove the links with other people**. The **Copy Person-centric Data** check box appears.



3. To copy the person's address; email; care and financial hardship data; income and expenditure data; and complaints data to a new joined customer ID, select the **Copy Person-centric Data** check box.

4. Click **Save**. Latitude removes the account from the link group.

Notes:

- If the party displayed currently is a member of an active arrangement, a message displays indicating that you cannot remove the link. Click **OK**.

- If an account in the linked group has a court case, a message displays in the status bar indicating that you cannot remove the link.

Related Topics

Account Links

Account Reminders

Feedback

Account Reminders

You can set a reminder for an account so that a user can carry out a specific action at a specific date and time. For example, you can set a reminder to have a user call an account at a certain time of day. Reminders appear for the desk associated to the account for which you set the reminder. If an account moves to another desk, the reminders stay with the account. Reminders continue to appear for the desk until you dismiss them.

Related Topics

Set a Timed Reminder

View Timed Reminders

Reschedule or Dismiss a Timed Reminder

Set an Account Follow-up Date

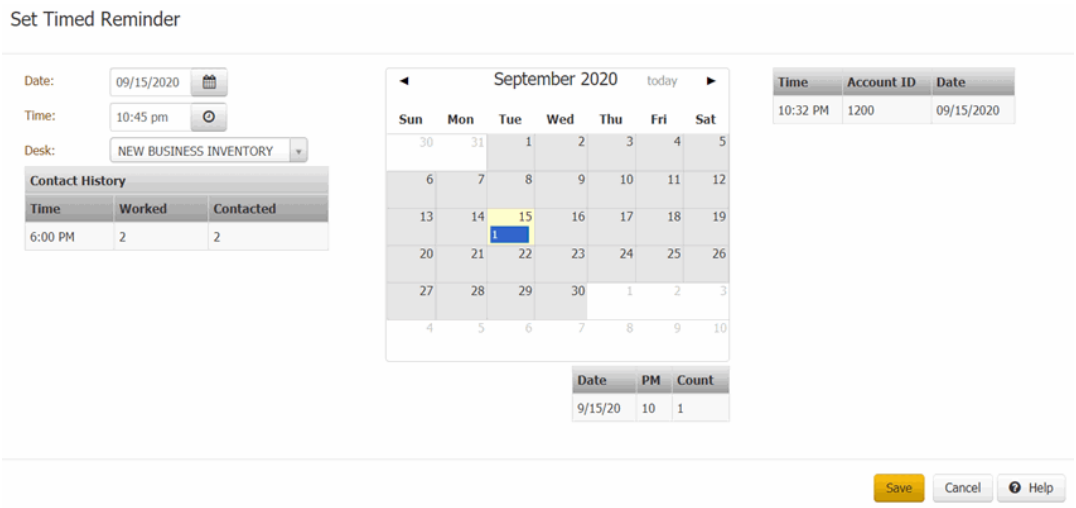
Feedback

Set a Timed Reminder

Use the **Set Timed Reminder** dialog box to set a reminder for an account associated to your desk and have the reminder appear at a specific date and time. You cannot set a reminder for a date and time in the past, a date that exceeds the maximum reminder days allowed for the desk, or for a closed account. For more information, see Add a Desk. If you have the Set Reminders for Others Permission, you can set reminders for accounts associated to other desks.

To set a timed reminder

1. In the **Account** toolbar, click **Reminder**.



Date: Date for the reminder to appear.

Time: Time for the reminder to appear.

Desk: Desk for the reminder to appear.

Contact History: Time of day and the number of times a user worked or contacted the account.

Calendar: Shows the current day (shaded yellow) and days that have reminders set (blue box with the number of reminders).

2. To set a reminder, do the following:

a. In the **Date** box, type or select the date for the reminder to appear.

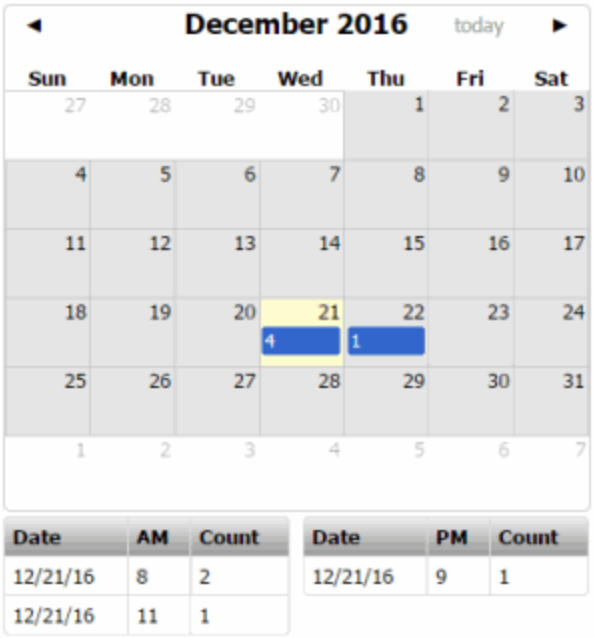
b. In the **Time** box, type or select the time for the reminder to appear.

c. In the **Desk** list box, click a desk and then click **Save**. The system closes the **Set Timed Reminder** dialog box and increases the **Reminders** counter in the **Status** bar by 1.

Notes:

- The system assigns the account to queue level 000, which doesn't allow the account to queue up for work until you dismiss the reminder. We recommend that you dismiss reminders in a timely manner to minimize the effect on the work queue. For more information, see Queue Level Codes for queue level 000.
- You cannot set a reminder on a closed account. The **Save** button is either not available or the system displays an error message when you click it.

3. To view details for an existing reminder, in the calendar, click the date that has a reminder set. The reminders for that date appear in the data grid beneath the calendar.



Date	AM	Count
12/21/16	8	2
12/21/16	11	1

Date	PM	Count
12/21/16	9	1

Date: Date for the reminders to appear.

AM/PM: Time of day for the reminders to appear.

Count: Number of reminders set for the date and time of day.

All the scheduled reminders for the selected desk and date appear in the grid next to the calendar.

Time	Account ID	Date
2:51 PM	1638	09/01/2020
6:19 PM	1239	09/01/2020
6:21 PM	1724	09/01/2020

Time: Time for the reminder to appear.

Account ID: Account IDs for the reminder to appear.

Date: Date for the reminders to appear.

Related Topics

Account Reminders

Set Reminders for Others Permission

Feedback

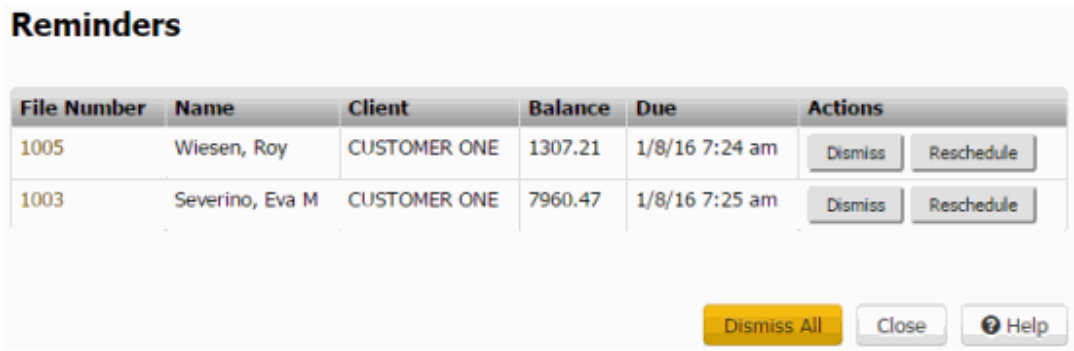
View Timed Reminders

Use the **Reminders** dialog box to view timed reminders for accounts associated to the desk that you are working. A notification appears in the **Status** bar that indicates the number of reminders that exist for the desk.

To view timed reminders

1. Check the **Status** bar for reminders. The following example shows that the desk has two reminders.

2. In the **Status** bar, click **Reminders**.



File Number: Unique code that the system assigned to identify the account.

Name: Name of the customer associated to the account.

Client: Name of the client who holds the account.

Balance: Balance due on the account.

Due: Date and time the reminder is due. Reminders display in date and time order.

3. To display an account, in the **File Number** column, click the file number. The **Reminders** dialog box closes and the account displays.

Note: The reminder continues to appear for the desk until you dismiss it. For more information, see Reschedule or Dismiss a Timed Reminder.

Related Topics

Account Reminders

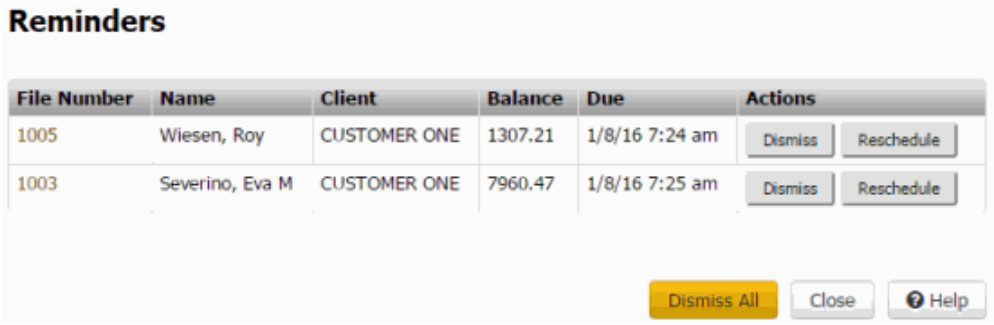
Feedback

Reschedule or Dismiss a Timed Reminder

Use the **Reminders** dialog box to reschedule a reminder so that it reappears later or dismiss a reminder so that it doesn't reappear again. Reminders continue to appear periodically until you reschedule or dismiss them. We recommend that you dismiss reminders in a timely manner to minimize the effect on the work queue. For more information, see Queue Level Codes for queue level 000.

To reschedule or dismiss a timed reminder

1. If a reminder exists for an account associated to the desk that you are working and the scheduled date and time have passed, the **Reminders** dialog box appears.



2. To display an account, click the account number. The **Reminders** dialog box closes.

3. To reschedule a reminder, do the following:

a. Click **Reschedule**. The **Set Timed Reminder** dialog box appears.

b. Modify the information and then click **Save**. For more information, see Set a Timed Reminder.

4. To dismiss a reminder, do one of the following:

   - To dismiss a single reminder, click **Dismiss**.
   - To dismiss all of the reminders, click **Dismiss All**.

   The system reassigns the account to the queue level that applies based on account activity or condition.

5. To close the dialog box without rescheduling or dismissing the reminder, click **Close**. The **Reminders** dialog box reappears periodically until you reschedule or dismiss the reminder.

Related Topics

Account Reminders

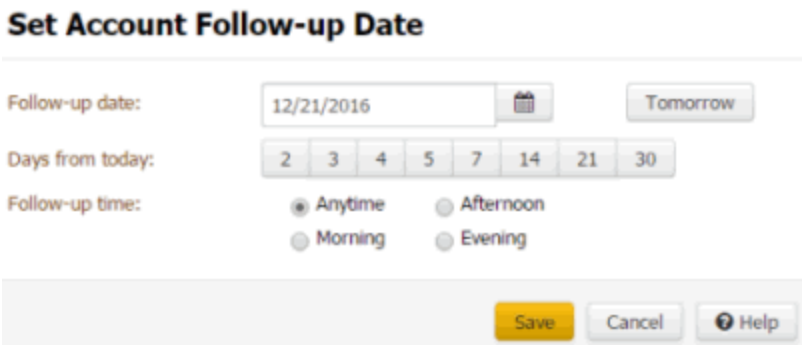
Feedback

Set an Account Follow-up Date

Use the **Set Account Follow-up Date** dialog box to set a follow-up date on an account. The account appears on the Agent Desktop on the specified day when you attempt to move to the next account while working a queue. You cannot set a follow-up for a date in the past, or a date that exceeds the maximum follow-up days allowed for the desk. For more information, see Add a Desk. To set a follow-up date, you must have the Set Follow-up Date Permission.

To set an account follow-up date

1. In the **Account** toolbar, click **Follow-up**.



Follow-up Date: Date to follow up on the account.

Tomorrow: Sets the account to display tomorrow.

Days from Today: Sets the account to display a specific number of days from the current date.

Follow-up Time: If selected, sets the account to display at a specific time of day.

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

Related Topics

Set Follow-up Date Permission

Account Reminders

Account Reactivation

Reinstate an Account

To reinstate an account flagged as closed and returned to the customer (queue level 999). You need the appropriate permissions to reinstate an account. For more information, see Access Reopen Account Permission.

To reinstate an account

1. Click **Reactivate** tab and select **Reinstate**.
2. After you click **Reinstate**, **Status** converts to active and **Q-Level** is updated.

Related Topics

Unreturn an Account

Unreturn an Account

To take back an account flagged as closed and returned to the customer (queue level 999). You need the appropriate permissions to unreturn an account. For more information, see Access Unreturn Account Permission

To unreturn an account

1. Click **Reactivate** tab and select **Unreturn Account**. The **Unreturn Account** dialog box appears.
2. If necessary, in the **Desk** list box, select a different desk to assign to the account and click **Save**.

Related Topics

Reinstate an Account

Queue and Desk Assignments

Feedback

Queue and Desk Assignments

You can change the work queue and desk assignments for the account.

Related Topics

Assign an Account to a Queue

Change a Desk Assignment

Reassign an Account to Your Desk

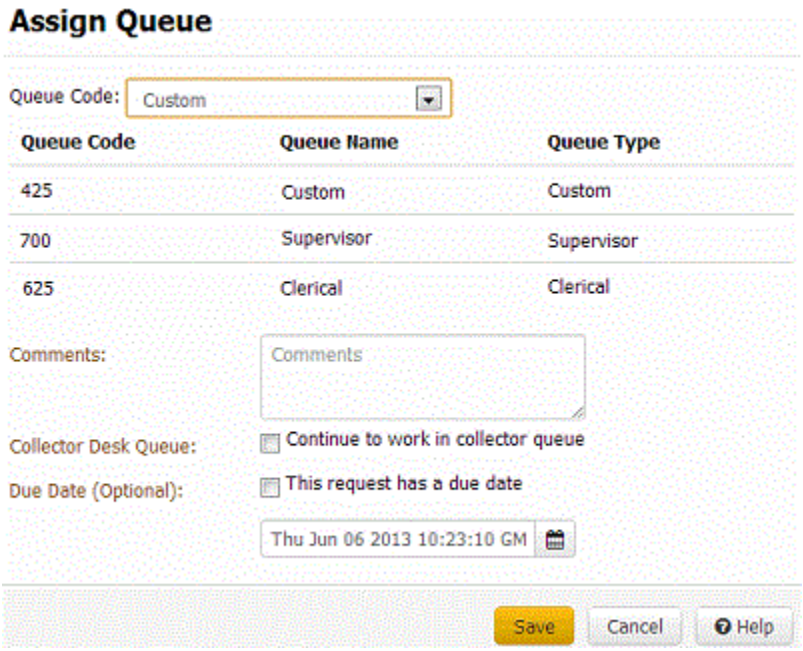
Feedback

Assign an Account to a Queue

Use the **Assign Queue** dialog box to assign an account for which you need assistance to a Clerical or Supervisor queue.

To assign an account to a queue

1. In the **Account** toolbar, click **Assign Queue**.



2. To display queues for a specific queue type only, in the **Queue Code** list box, click the queue.
3. In the data grid, click the queue to which to assign the account.
4. In the **Comments** box, type a comment regarding what assistance the user needs on the account.

5. To continue to work the account in the Collector queue, select **Continue to Work in Collector Queue**. If this check box is cleared, the account doesn't appear in the Collector queue until it's released from the Supervisor or Clerical queue.

6. If you want the request completed by a specific date, select **This Request has a Due Date** and then type or select the due date from the calendar. You cannot select a date and time in the past.

7. Click **Save**. If the account has a queue assignment already, the system displays a message. Assign the account to a different queue.

Related Topics

Queue and Desk Assignments

Change a Desk Assignment

Reassign an Account to Your Desk

Feedback

Change a Desk Assignment

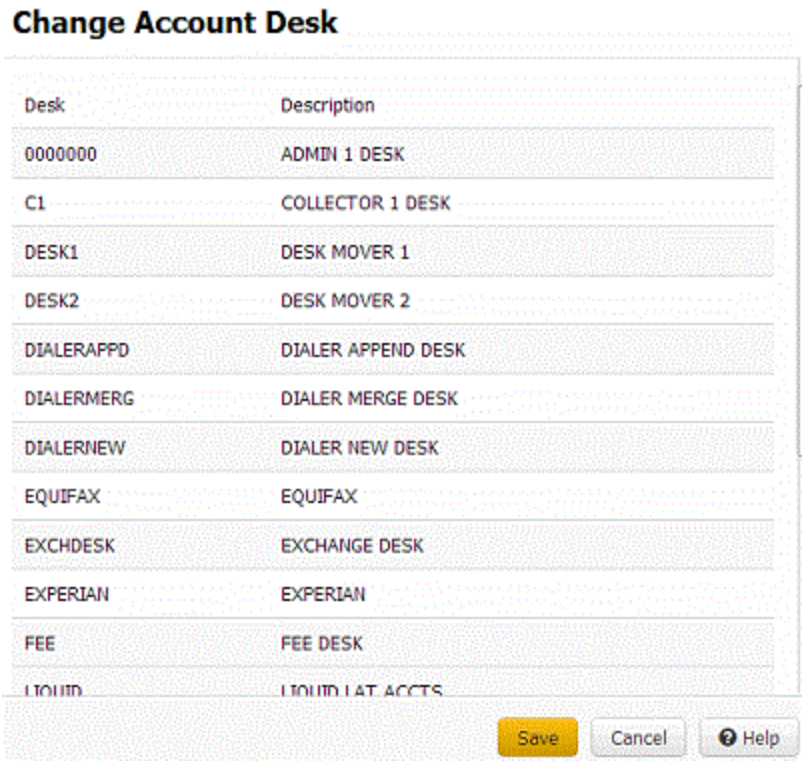
Use the **Change Account Desk** dialog box to assign an account to another desk. The desks that are available to you include your desk and your supervisor's desk. If you don't have Change Desk Permission, the **Branch & Desk** menu is not available.

Desks that the system excludes from the list include:

- Desks assigned to the account.
- Desks that you don't have permission to which to assign accounts.
- Desks that are duplicates (for example, your desk is the same as the team supervisor desk).
- Desks not assigned to an active user, such as vacant desks.

To change a desk assignment

1. In the **Account** toolbar, click **Branch & Desk** and then click **Choose Desk**.



2. Click the desk and then click **Save**.

Tip: You can also select a desk from the "quick-pick" list in the **Branch & Desk** menu.

Related Topics

Queue and Desk Assignments

Change Desk Permission

Reassign an Account to Your Desk

If you create a payment arrangement for an account not assigned to your desk, you can reassign the account to your own desk under certain conditions. The conditions are:

- You have the appropriate permissions to reassign the account to your desk. For more information, see the My Desk Assignment permission.
- To view **My Desk** button permissions needs to be enabled.
- Account is assigned to an eligible desk type currently.
- Account has one or more active promises, PDCs, or DCCs.
- Account does not have restricted access.
- You have not exceeded the number of accounts allowed for your desk at any given time.
- The user needs to be allocated with some desk code. If the user is not allocated any desk code then a error message dialog box appears
- Account should be an inventory type.

To reassign an account to your desk

1. Click **My Desk** and then **Desk Assign** dialog box appears.

- If all the conditions are satisfied then the account will be moved.
- All the linked accounts will also be moved along with it, if the focussed account meets all the criteria.

2. Click **OK**.

Related Topics

Queue and Desk Assignments

My Desk Assignment Permission

Statuses

Statuses

An account status changes based on system activities or when you choose to change it. Only the status codes for which you have permissions are available to you. You can:

- Select a status from the **Status** menu.
- Open the **Change Account Status** dialog box and select a status.
- Specify the statuses to include in the **Status** menu.

Note: Codes in blue signify an open status and codes in red signify a closed status.

Related Topics

Select a Quick-pick Account Status

Change an Account Status

Select Accounts

Maintain the Quick-pick Account Status List

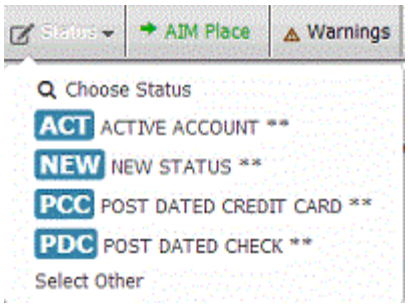
Standard Status Codes

Select a Quick-pick Account Status

Use the **Status** menu to select an account status from the "quick-pick" list of statuses. You must have the Change Status Permission. For information about maintaining the "quick-pick" list, see Maintain the Quick-pick Account Status List.

To select a quick-pick account status

- In the **Account** toolbar, click **Status** and then click a status option (for example, **HOT**.) The system changes the account status to the selected status.



Related Topics

Maintain the Quick-pick Account Status List

Standard Status Codes

Statuses

Change Status Permission

Status Codes

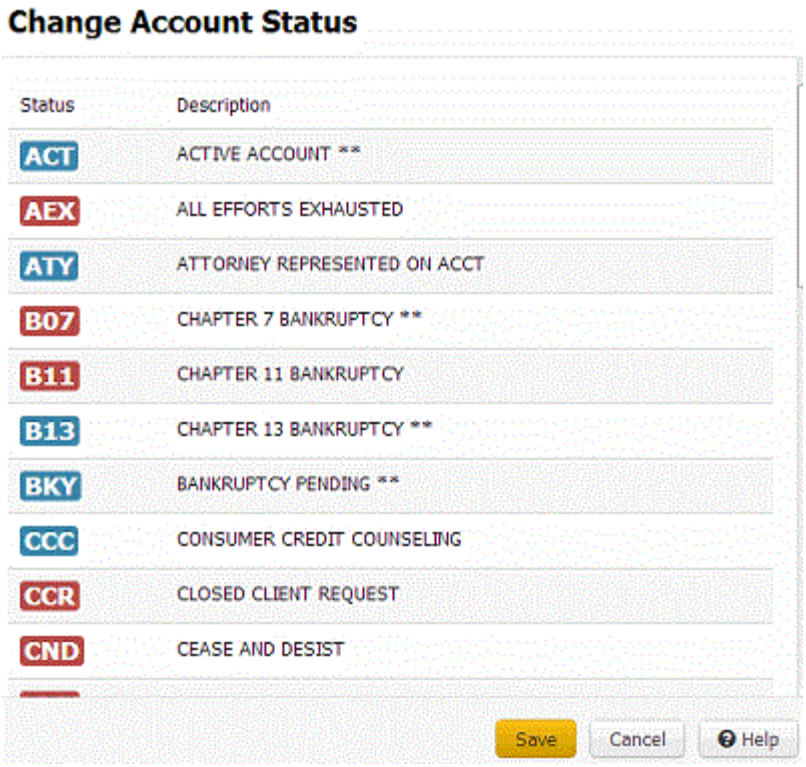
Feedback

Change an Account Status

Use the **Change Account Status** dialog box to change the status of an account. The system only displays the status codes for which you have permissions. For more information, see Change Status Permission.

To change an account status

1. In the **Account** toolbar, click **Status** and then click **Choose Status**.



2. Click the status to assign to the account and then click **Save**.

Note: If the account is linked to another account (and this feature is available to you), the **Select Accounts** dialog box appears. Do the steps to Select Accounts.

Related Topics

Standard Status Codes

Select Accounts

Statuses

Change Status Permission

Status Codes

Feedback

Select Accounts

Use the **Select Accounts** dialog box to select multiple linked accounts for which to change the account status or request a letter, depending on which task you are performing. This dialog box displays for linked accounts.

To select accounts

1. Do one of the following:

   - Change an Account Status
   - Request a Letter

The **Select Accounts** dialog box appears.

Note: If closed accounts are excluded from the list, a check mark in a red box appears (as shown in the example). If closed accounts are included in the list, an **X** in a blue box appears.

2. Do one of the following:

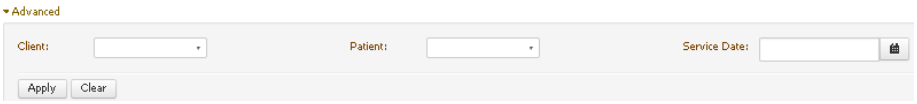
   - To include closed accounts in the list, click the check mark in the red box. An **X** in a blue box appears in place of the check mark.
   - To remove closed accounts from the list, click the **X** in the blue box. A check mark in a red box appears in place of the **X**.

3. To select the accounts for which to change the status or request a letter, do one of the following:

   - To include all the linked accounts, select the check box next to **Select/Deselect All** in the column heading.
   - To exclude all the linked accounts (except the account you are working), clear the check box next to **Select/Deselect All** in the column heading.
   - To include an individual linked account, select the corresponding check box.
   - To exclude an individual linked account, clear the corresponding check box.

4. To specify advanced options, do the following:

a. Click **Advanced**. The advanced options appear.



   b. To include accounts for a specific client, in the **Client** list box, click the client name.

   c. To include accounts for a specific medical patient, in the **Patient** list box, click the patient name.

   d. To include accounts for a specific date that the patient received medical care, in the **Service Date** list box, click the service date.

   e. Click **Apply**.

5. Click **Save**. If you are changing the status and the selected accounts have an active payment arrangement, a confirmation dialog box appears. Click **OK**.

The system either changes the status of the specified accounts or requests a letter for the specified accounts, depending on what action lead you to this dialog box.

Related Topics

Change an Account Status

Request a Letter

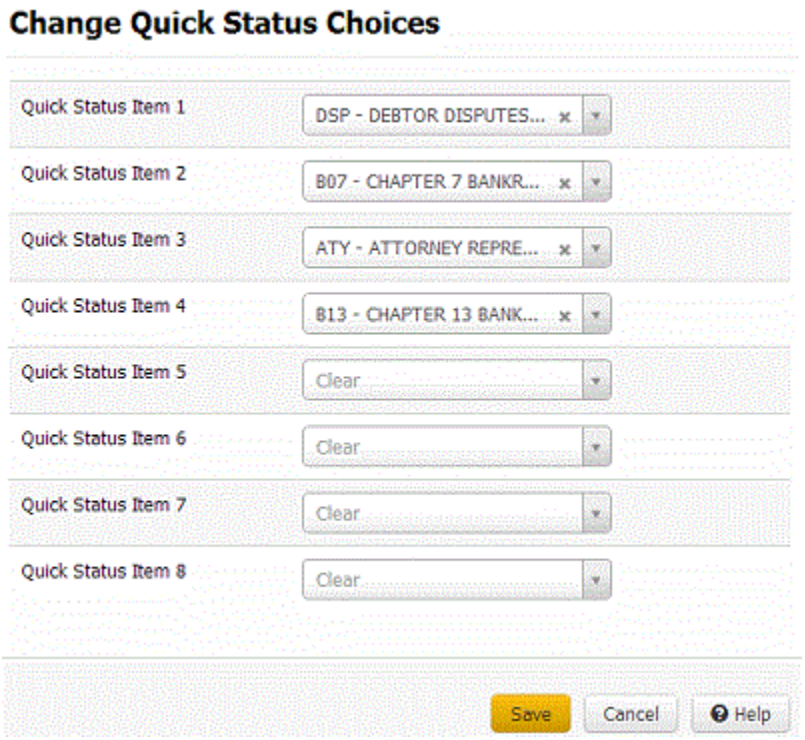
Feedback

Maintain the Quick-pick Account Status List

Use the **Change Quick Status Choices** dialog box to maintain the "quick-pick" list of statuses that display in the **Status** menu.

To maintain the quick-pick account status list

1. In the **Account** toolbar, click **Status** and then click **Select Other**.



2. In the **Quick Status Item** list boxes, click a status to include in the **Status** menu and then click **Save**. You can specify up to eight statuses to display in the **Status** menu.

Related Topics

Select a Quick-pick Account Status

Standard Status Codes

Statuses

Feedback

Standard Status Codes

The following table lists standard status codes and their description. Your organization may have defined more status codes. You can only use the status codes for which you have the Change Status Permission.

*Indicates system-utilized status codes.

Code	Description	Type	Return Days
ACT*	Active Accounts	Active	0
AEX	All Efforts Exhausted	Closed	30
ATY	Attorney Represented on Account	Closed	0
B07*	Chapter 7 Bankruptcy	Closed	0
B13*	Chapter 13 Bankruptcy	Closed	0
BKY*	Bankruptcy	Closed	0
CCC	Consumer Credit Counsel	Active	0
CCR	Closed Client Request	Closed	0
CND	Cease and Desist	Active	0
DEC	Customer is Deceased	Closed	0
DIP	Customer in Prison	Closed	0
DSP	Customer Disputes Balance	Active	0
DUP	Duplicate	Active	0
HLD	Client put on Hold	Active	0
HOT	Special Interest	Active	0
LET	Special Letter Series	Active	0
LOP	Letter of Protection	Active	0
NEW*	New Business	Active	0
NPC*	No More Postdated Checks	Active	0
NSF*	Bounced Check Outstanding	Active	0
PCC*	Pending Credit Card payments	Active	0
PDC*	Postdated Check	Active	0
PIE	Placed in Error	Closed	0
PIF*	Account Paid in Full	Closed	30
PND	Pending	Active	0
PPA*	Partial Payment Arrangement	Active	0
PPI	Partial Payment Inactive	Active	0
RCL	Recalled by Client	Closed	0
SIF*	Account is Settled in Full	Closed	30
SKP	Skip Account	Closed	30

Related Topics

Select a Quick-pick Account Status

Changing an Account Status

Maintain the Quick-pick Account Status List

Statuses

Status Codes

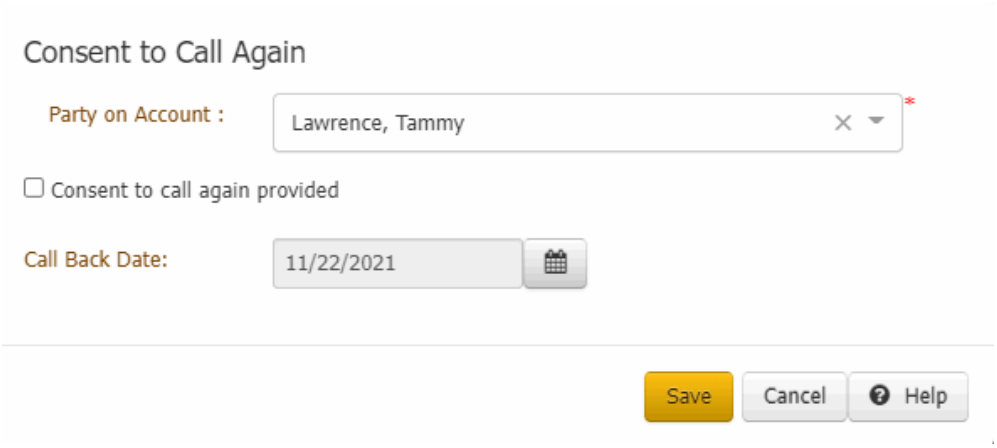
Compliance

View Contact Made

Use the **Compliance** menu to select **Contact Made** from the list. You must have the Call Attempt and Conversation Limits Permission.

To view the contact made, do the following:

1. In the **Account** toolbar, click **Compliance** and then click **Contact Made** option.



2. Click and select the required debtor name from the **Party on Account** box.
3. If the call back date is passed, then to reset the call again, select the **Consent to call again provided** check box.
4. Click and select the call back date.
5. Click **Save**.

Related Topics

Call Attempt and Conversation Limits Permission

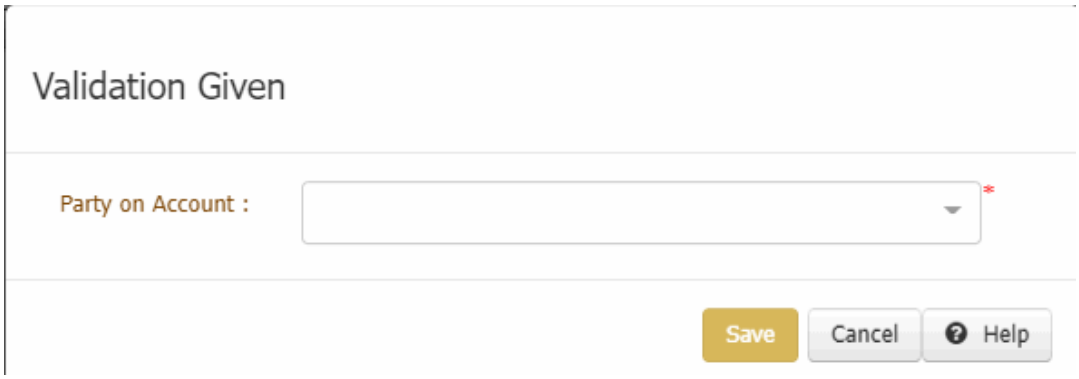
Validation Given

Validation Given

Use the **Compliance** menu to select **Validation Given** from the list. You must have the Validation Notice Tracking Permission.

To view the validation given, do the following:

1. In the **Account** toolbar, click **Compliance** and then click **Validation Given** option.



2. Click and select the required debtor name from the **Party on Account** box.
3. Click **Save**.
4. A message dialog box appears indicating that the validation notice provided to the customer/debtor verbally. Click **OK**.

Note: Period of 30 days calculated for validation, excluding weekends and holidays.

Related Topics

Validation Notice Settings

Warnings

Warnings

Warnings are displayed based on the call preferences of the debtor. You must have the Validation Notice Tracking Permission enabled.

Related Topics

Validation Notice Settings

View Warnings

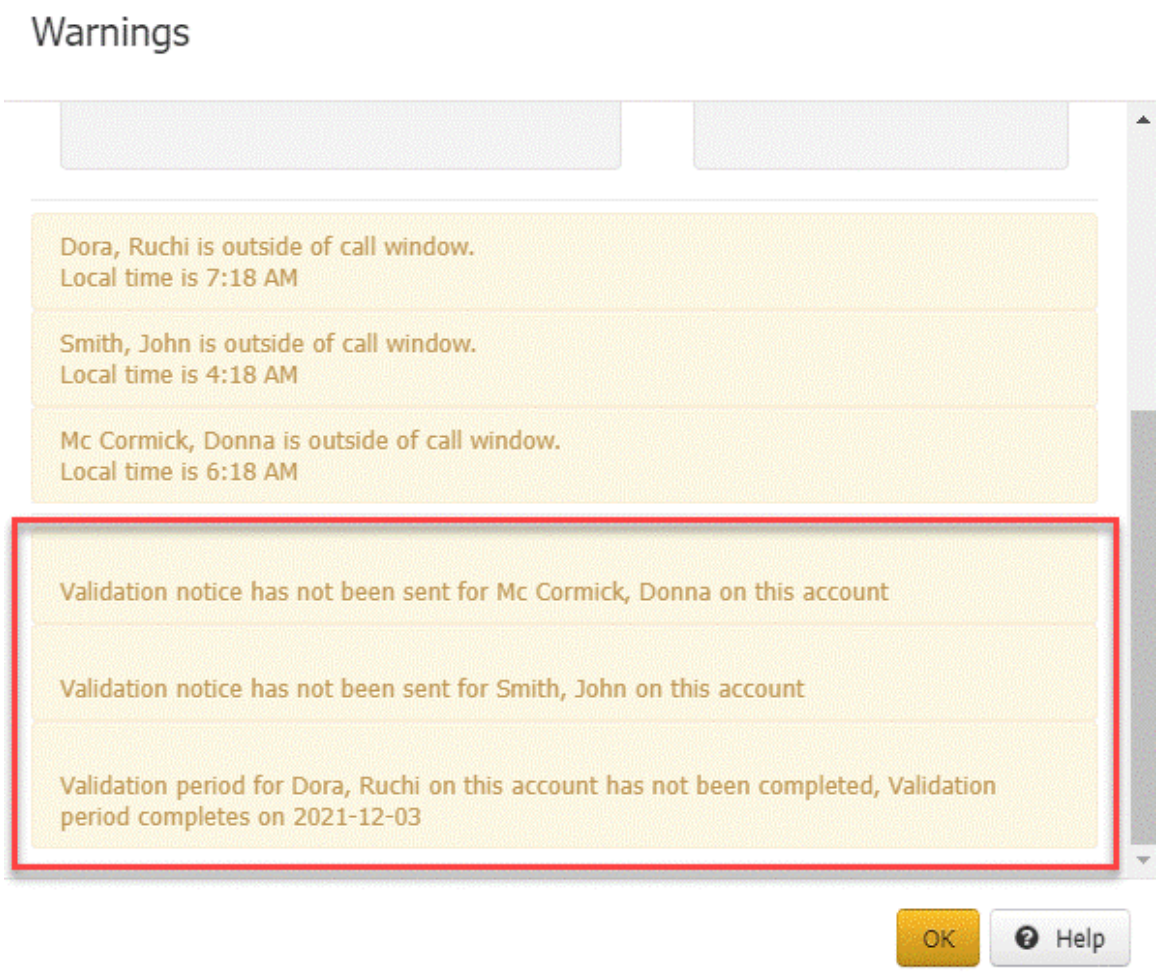
View Warnings

Use the **Warnings** dialog box to view the validation notice status.

To view warnings, do one of the following:

- Retrieve an account using search, open interaction, work queue, history, or inventory.
- In the **Account** toolbar, click **Warnings**.

The Warnings dialog box appears.

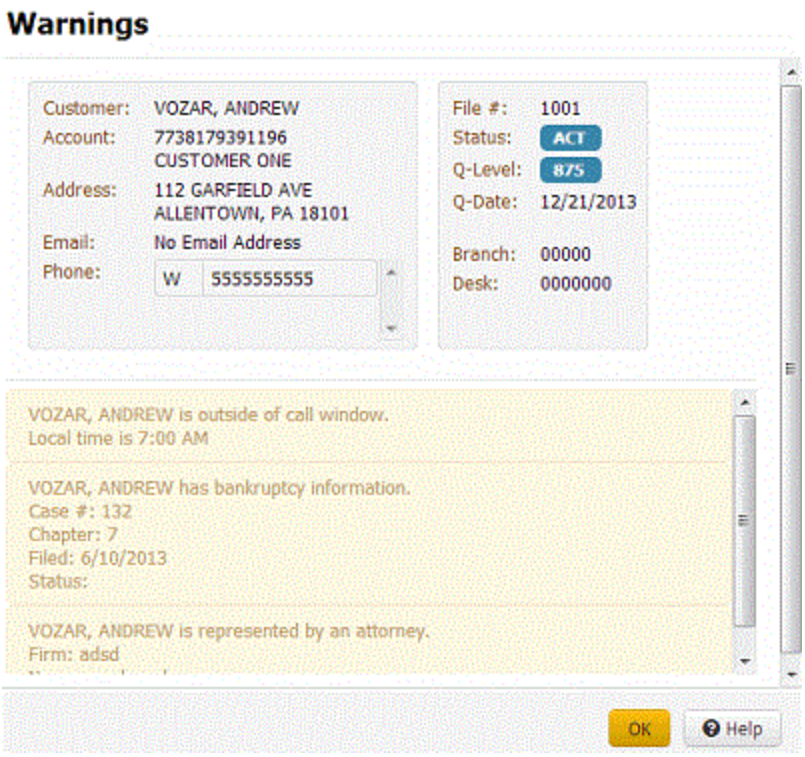


View Account Warnings

Use the **Warnings** dialog box to view warning messages for the account. You can click the **Warnings** link in the **Account** toolbar to open this dialog box at any time. For information about warnings displaying automatically, see the Warning Dialog Permission.

To view account warnings

1. In the **Account** toolbar, click **Warnings**.



Customer: Name of the customer on the account.

Since: Date the client opened the account.

Type: Type of account (for example, business or residential).

Account: Unique code that the client assigned to identify the account.

Address: Customer's street address, city, state, and postal code.

File #: Unique code that the system assigned to identify the account.

Status: Status of the account.

Q-Level: Three-digit code used to sort and prioritize accounts in the queue.

Q-Date: Date the system queues the account for the collector to work.

Branch: Customer branch associated to the account.

Desk: Desk assigned to the account.

Warnings: Warning messages for the account.

2. When finished viewing the information, click **OK**.

Related Topics

Display State Warnings Permission

Display Time Zone Warnings Permission

Warning Dialog Permission

Mail Return

Mail Return

Use **Mail Return** to reset the validation notice. If an account flagged with mail return, during validation period with a letter type DUN. Then it would clear the validation expiration period to be null and change the status as returned. It is valid for single and linked accounts.

Related Topics

Validation Notice Settings

Manage Mail Return

Manage Mail Return

Use the **Mail Return** dialog box to process the validation notice status.

To process the mail return, do one of the following:

- Retrieve an account using search, open interaction, work queue, history, or inventory.
- In the **Account** toolbar, click **Mail Return**.

The Mail Return dialog box appears.

Select the required account check box and then click **Save**.

The **Validation Period Expiration** is set to **Null** for the selected mail return.

Related Topics

Validation Notice Settings

Processes and Stages

Processes and Stages

You can start an account in the first stage in a process and move the account to the next or previous stage in a process. You can also view the processes and stages available to you based on your permissions.

Related Topics

Start an Account in a Process

Move an Account to the Next Process Stage

Move an Account to the Previous Process Stage

View the Available Processes and Stages for an Account

View Process and Stage History

Manual Process Stages

Process Stages

Feedback

Start an Account in a Process

Use the **Start** option in the **Processes** menu to start an account in the first stage of a process. You can only start an account in the first stage that your organization set up for the process. However, you can move the account to subsequent stages within the process after you start the process.

To start an account in a process

- In the **Account** toolbar, click **Processes** > **Start** > **[process name]**. The anchor card for the selected process appears in the **Account Information** panel. The following example shows that the account is in the Confirmation stage of the Dispute process. It also shows that the process has two stages and that the account is in the first stage.

Related Topics

Processes and Stages

Applicable Processes and Stages Permission

Process Stages

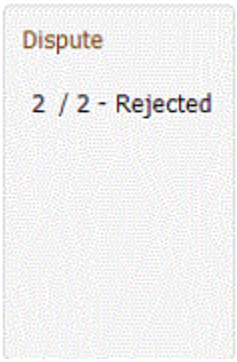
Feedback

Move an Account to the Next Process Stage

Use the **Current** option in the **Processes** menu to move an account to the next stage of a process. You cannot select a specific stage to which to move the account. However, you can continue moving the account to subsequent stages within the process until you get to the stage you want.

To move an account to the next process stage

- In the **Account** toolbar, click **Processes** > **Current** > **[process name - stage name]** > **Next**. The system updates the anchor card in the **Account Information** panel to reflect the current stage. The following example shows that the account is in the Rejected stage of the Dispute process. It also shows that the process has two stages and that the account is in the second stage.



Related Topics

Processes and Stages

Feedback

Move an Account to the Previous Process Stage

Use the **Current** option in the **Processes** menu to move an account to the previous stage of a process. You cannot select a specific stage to which to move the account. However, you can continue moving the account to previous stages within the process until you get to the stage you want.

To move an account to the previous process stage

- In the **Account** toolbar, click **Processes** > **Current** > **[process name - stage name]** > **Previous**. The system updates the anchor card in the **Account Information** panel to reflect the current stage. The following example shows that the account is in the Confirmation stage of the Dispute process. It also shows that the process has two stages and that the account is in the first stage.

Related Topics

Start an Account in a Process

Move an Account to the Next Process Stage

View the Available Processes and Stages for an Account

Processes and Stages

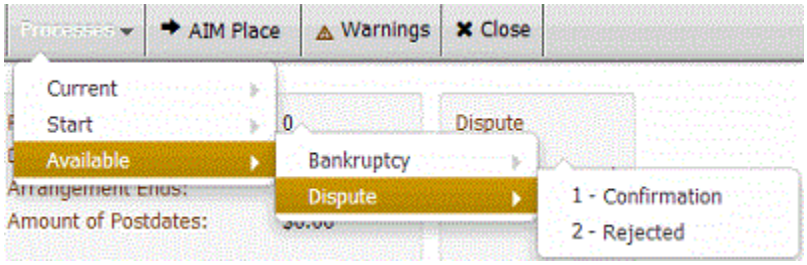
Feedback

View the Available Processes and Stages for an Account

Use the **Available** option in the **Processes** menu to view the processes and stages that are available to you based on your permissions.

To view the available processes and stages for an account

- In the **Account** toolbar, click **Processes** > **Available** > [**process name**]. A list of available stages for the selected process appears. The following example shows that the Bankruptcy and Dispute processes are available for the account, and the Dispute process has two stages: Confirmation and Rejected.



Related Topics

Processes and Stages

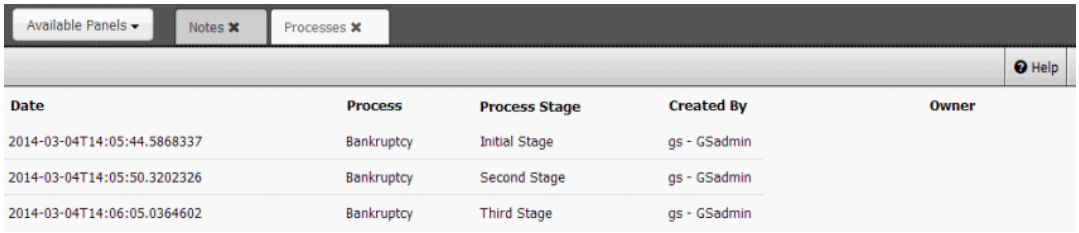
Feedback

View Process and Stage History

Use the **Processes** panel to view the processes and stages to which a user moved the account. The panel displays the information in ascending date and time order.

To view process and stage history

- In the **Reference Panel** navigation bar, click **Available Panels** and then click **Processes**. The **Processes** panel appears.



Date: Date and time the user moved the account to the process and stage.

Process: Process to which the user moved the account.

Process Stage: Stage within the process to which the user moved the account.

Created by: User who moved the account to the process and stage.

Owner: Scope owner of the stage (for example, Desk, Team, Department, Branch). A supervisor or manager can create work queues for specific stages based on the owner.

Related Topics

Processes and Stages

Reference Panels Permission

Reference Panels

Placements and Recalls

Placements and Recalls

You can flag accounts for placement with or recall from outside collection agencies or attorneys. When a user generates placement and recall files using the AIM program, the system includes the accounts that the system flagged for placement or recall in the corresponding files. The system sends the files to the appropriate agencies or attorneys for processing. For more information about AIM, see the AIM documentation. You must have the AIM Place/Recall Functionality Permission to place and recall accounts from within Collector.

The following menu states are available based on the status of the placement or recall.

- If the **AIM Place** menu option is visible and available, an outside agency or attorney doesn't hold the account currently.
- If the **AIM Place** menu option is visible but not available, the account is pending placement with an outside agency or attorney.
- If the **AIM Recall** menu option is visible and available, the account is available for recall from an outside agency or attorney.
- If the **AIM Recall** menu option is visible but not available, the account is pending recall from an outside agency or attorney. A pending recall occurs when a user recalls an account manually or when the automatic recall date has passed.

Related Topics

Place an Account With an Agency or Attorney

Recall an Account From an Agency or Attorney

AIM Place/Recall Functionality Permission

Place an Account With an Agency or Attorney

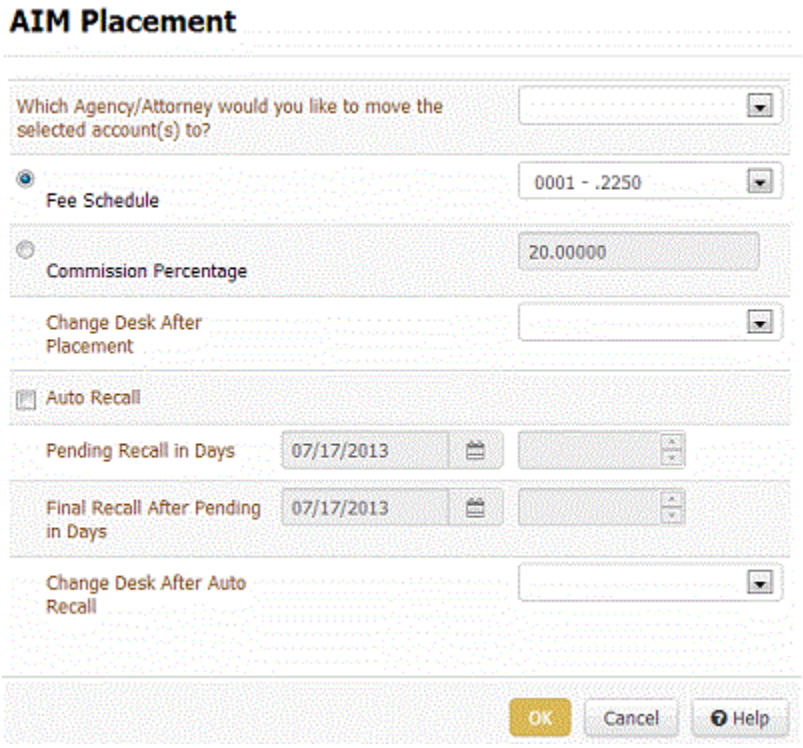
Use the **AIM Placement** dialog box to flag an account for placement with an outside collection agency or attorney.

Notes:

- If the AIM Place menu option is visible and available, an outside agency or attorney doesn't hold the account currently.
- If the AIM Place menu option is visible but not available, the account is pending placement with an outside agency or attorney.

To place an account with an agency or attorney

1. In the **Account** toolbar, click **AIM Place**.



Which Agency/Attorney...: Agency or attorney to place the account with.

Fee Schedule: If selected, specify the fee schedule to use when applying commissions.

Commission Percentage: If selected, specify the commission percentage to use when applying commissions.

Change Desk After Placement: Desk to assign to the account after it's placed with the agency or attorney. If you don't want to change the desk assignment, leave this list box blank.

Auto Recall: If selected, the system generates pending and final recall files automatically. If cleared and you want to recall the account, do the steps to Recall an Account From an Agency or Attorney to recall the account manually.

Pending Recall in Days: Date to generate the pending recall file automatically. When you specify a date, the system calculates the number of days between the current date and the pending recall date.

Final Recall After Pending in Days: Date to generate the final recall file automatically. When you specify a date, the system calculates the number of days between the pending and final recall dates.

Change Desk After Auto Recall: Desk to assign to the account after it's recalled automatically from the agency or attorney.

2. Complete the information and then click **OK**. The **AIM Place** menu option becomes unavailable to indicate that the account placement is pending. When a user generates placement files for the agency or attorney using the AIM program, AIM includes the account in the file. Latitude then displays the AIM Card.

Related Topics

Recall an Account From an Agency or Attorney

Placements and Recalls

Feedback

Recall an Account From an Agency or Attorney

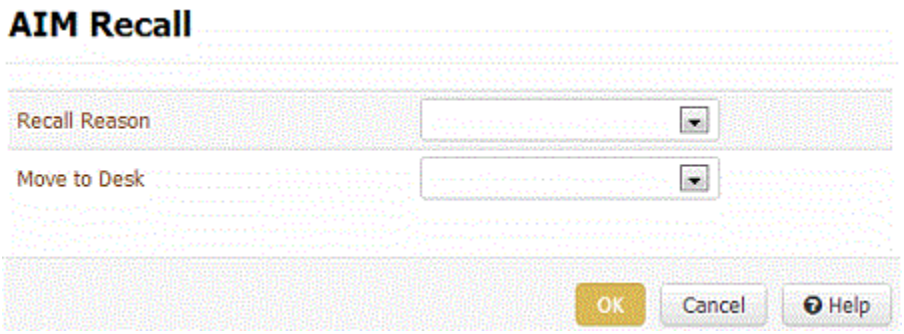
Use the **AIM Recall** dialog box to flag for recall an account that your organization placed with an outside collection agency or attorney. If the system already flagged the account for automatic recall, doing this step isn't necessary.

Notes:

- If the AIM Recall menu option is visible and available, the account is available for recall from an outside agency or attorney.
- If the AIM Recall menu option is visible but not available, the account is pending recall from an outside agency or attorney. A pending recall occurs when a user recalls an account manually or when the automatic recall date has passed.

To recall an account from an agency or attorney

1. In the **Account** toolbar, click **AIM Recall**.



Recall Reason: Reason that you are recalling the account from the outside collection agency or attorney.

Move to Desk: Desk to assign to the account when the system generates the recall file. If you don't want to change the desk assignment, leave this list box blank.

2. Complete the information and then click **OK**. The **AIM Recall** menu option becomes unavailable to indicate that the account recall is pending. When a user generates recall files for the agency or attorney using the AIM program, AIM includes the account in the file. Latitude removes the AIM Card.

Related Topics

Place an Account With an Agency or Attorney

Placements and Recalls

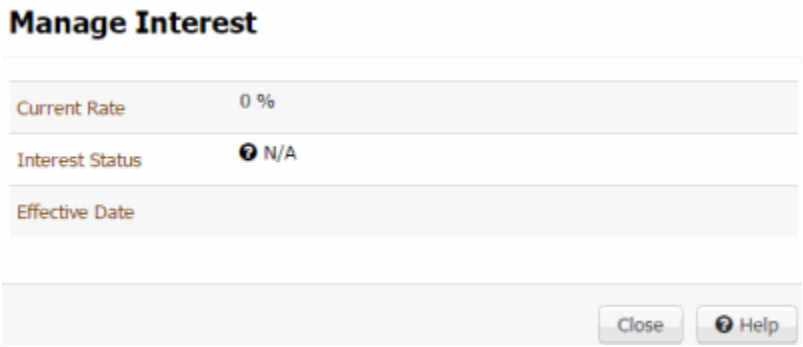
Feedback

Manage Interest

Use the **Manage Interest** dialog box to start or stop client-level interest for the account. You must have the Allow Start/Stop Interest Permission and your organization must have configured interest at the client level. For more information, see Client Interest.

To manage interest

1. In the **Account** toolbar, click **Interest**.



Current Rate: Current interest rate. If you set a rate at the account level, the system displays that rate. If you didn't set a rate at the account level, the system displays the customer rate unless one doesn't exist. If no rate exists, this box displays "0%".

Interest Status: Indicates whether the account-level interest has started or stopped. If you didn't set a rate at the account level, this box displays "N/A".

Effective Date: Date the interest rate took effect. If no rate exists, this box is blank.

2. Do one of the following:

   - To start client-level interest on the account, click **Start**.
   - To stop client-level interest on the account, click **Stop**.

Related Topics

Client Interest

Collection Holds

Collection Holds

You can place collection holds at the account level or customer level to suspend outbound collection activity for a specific number of days. Holds do not prevent inbound activity. Holds don't suspend communication templates that your organization flagged to ignore holds.

Account-level hold

An account-level hold suspends activity for all parties on a specific account Collection activity continues on other accounts for which the parties are responsible. An account-level hold:

- Suspends outbound collection activity on the account.

- Suspends outbound letters, email messages, and SMS communications to parties on the account.
- Excludes the account from dialer campaigns. Users can still click to dial calls and dial calls manually.
- Excludes the account from work queues.
- Suspends interest accrual for the account.

Customer-level hold

A customer-level hold suspends activity for a specific party on the specific account only. Collection activity continues for other parties on the account. Collection activity also continues on other accounts for which the party is responsible. A customer-level hold:

- Suspends outbound collection activity on the account for the specific party.
- Suspends outbound letters, email messages, and SMS communications to the specific party on the account.

Related Topics

Place an Account-Level Hold

Place a Customer Level Hold

Remove an Account-Level Hold

Remove a Customer-Level Hold

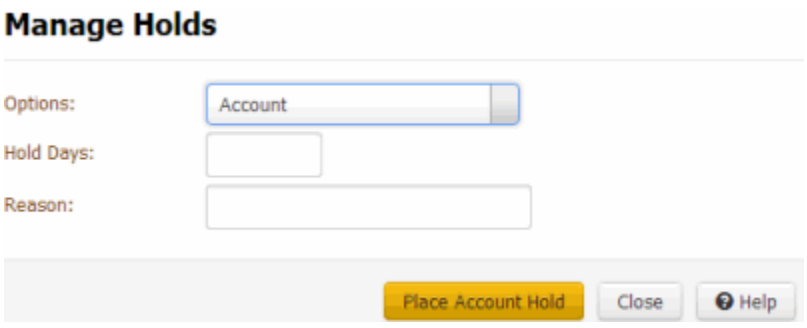
Feedback

Place an Account-Level Hold

Use the **Manage Holds** dialog box to place a collection hold at the account-level. You must have the Allow Creation of Holds Permission.

To place an account-level hold

1. In the **Account** toolbar, click **Holds**.
2. In the **Options** list box, click **Account**.



Hold Days: Number of days to place the account on hold.

Reason: Reason for placing an account-level hold on the account.

3. Complete the information and then click **Place Account Hold**. The system displays a message on the Account Status Card to indicate an account hold.

Related Topics

Collection Holds

Account Status Card

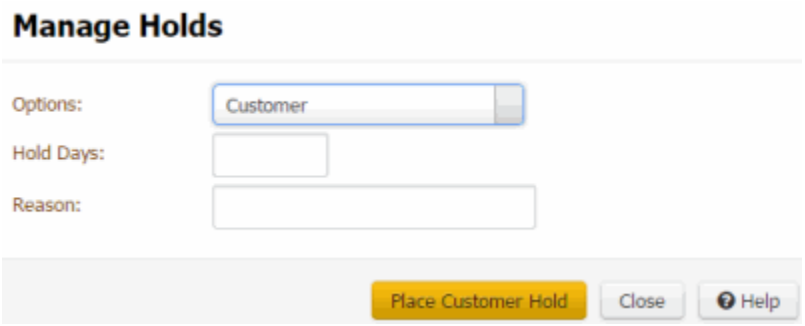
Feedback

Place a Customer-Level Hold

Use the **Manage Holds** dialog box to place a collection hold at the customer-level. You must have the Allow Creation of Holds Permission.

To place a customer-level hold

1. In the **Account** toolbar, click **Holds**.
2. In the **Options** list box, click **Customer**.



Hold Days: Number of days to place the account on hold.

Reason: Reason for placing a customer-level hold on the account.

3. Complete the information and then click **Place Customer Hold**. The system displays a message on the Account Navigator card to indicate a collection hold.

Related Topics

Collection Holds

Account Navigator Card

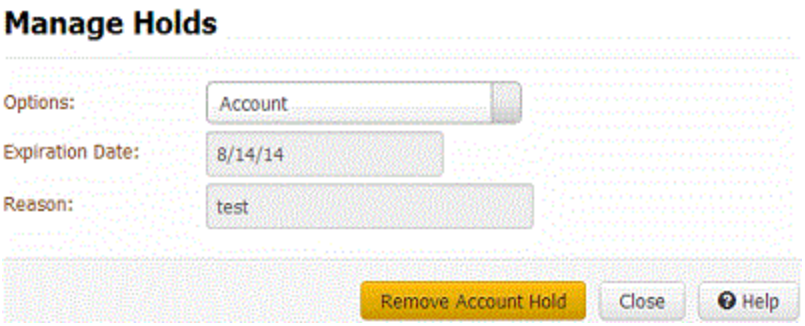
Feedback

Remove an Account-Level Hold

Use the **Manage Holds** dialog box to remove an account-level collection hold. Latitude removes holds automatically on the expiration date. You must have the Allow Creation of Holds Permission.

To remove an account-level hold

1. In the **Account** toolbar, click **Holds**.
2. In the **Options** list box, click **Account**.



3. Click **Remove Account Hold**.

Related Topics

Collection Holds

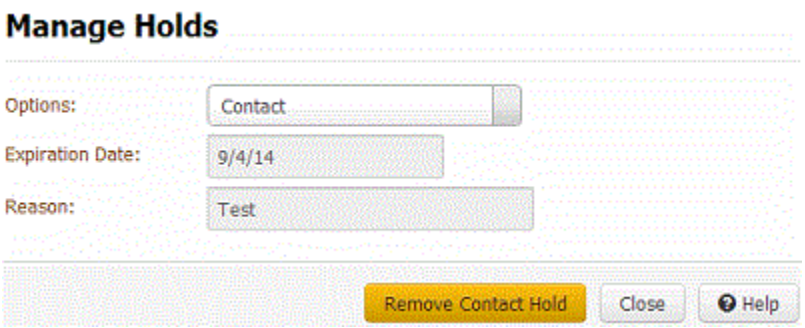
Feedback

Remove a Customer-Level Hold

Use the **Manage Holds** dialog box to remove a customer-level collection hold. Latitude removes holds automatically on the expiration date. You must have the Allow Creation of Holds Permission.

To remove a customer-level hold

1. In the **Account** toolbar, click **Holds**.
2. In the **Options** list box, click **Customer**.



3. Click **Remove Customer Hold**.

Related Topics

Collection Holds

Task Panels

Feedback

Task Panels

The **Task** panels allow you to maintain information for the account. This section contains a **Task Panel** navigation tree, which allows you to open the panels. The panels available to you are based on how your organization configured the Task Panels Permission.

Related Topics

Task Panels Permission

Customers

Arrangements

Payments

Letters

Legal Case

Care and Financial Hardship

Complaints

Disputes

RDN Integration

Customers

Customers

The **Customer** panel displays information for the parties associated to the account There is a link for each party associated to the account. When you click a party, the contact information for that party appears. Several tabs are available to allow you to view more information for the selected party, such as employer and spouse information.

Related Topics

Contact Information

Maintain Employer Information

Maintain Spouse Information

Maintain Attorney Information

Bankruptcy

Maintain Deceased Information

Maintain Assets

Maintain CCCS Information

Task Panels Permission

Task Panels

Contact Information

Feedback

Contact Information

The **Contact Information** tab displays information for a party on the account. Latitude uses information for the current responsible party when generating items such as letters and credit reports.

Related Topics

Maintain Contact Information

Add a Party to an Account

Flag an Account Address

Add a Phone Number to an Account

Modify a Phone Number on an Account

Change the Status of an Account Phone Number

Dial a Phone Number

Add a Phone Contact Result

Phone Number Status Icons

Phone Usage Consent Icons

Customers

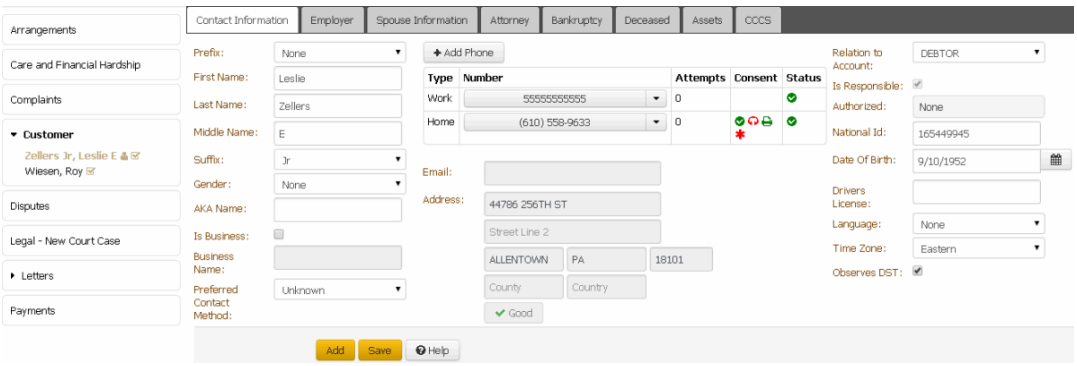
Feedback

Maintain Contact Information

Use the **Contact Information** tab to maintain contact information for a party on the account.

To maintain contact information

1. In the **Task Panel** navigation tree, click **Customer** and then click a name.



Column 1

Prefix: Person's name prefix.

First Name: Person's first name.

Last Name: Person's last name.

Middle Name: Person's middle name.

Suffix: Person's name suffix.

Note: To modify a party's name, you must have the Update Name Permission.

Gender: Person's gender.

AKA Name: Other name the person uses. To modify a party's AKA name, you must have the Update Name Alias Permission.

Is Business: If selected, the account is a business account. If the **Prefix**, **First Name**, **Last Name**, **Middle Name**, or **Suffix** boxes contain data, the system clears them.

Business Name: Name of the business. Required if **Is Business** is selected.

Preferred Contact Method: Person's preferred method of contact (for example, email, letter, text, or phone).

Column 2

Type: Type of phone number (for example, home, work, cell).

Number: Person's phone number. This box can include the phone extension. If a call is on hold, a Hold icon and a message appear next to the phone number. If the person has multiple phone numbers of the same type (for example, home), the system displays only one phone number for each type. To view all the phone numbers, see View Phone Numbers for an Account.

Attempts: Number of attempts to contact the person at the corresponding phone number, either by direct dial or the Dialer.

Consent: Icons that represent the permissions the person granted for calling the corresponding phone number. For more information, see Phone Usage Consent Icons.

Status: Icons that represent the status of the phone number. For more information, see Phone Number Status Icons.

Email: Person's email address. To view or modify email addresses, see Email Addresses.

Address: Person's street address, city, state, postal code, county, and country. To add or modify an address, see Addresses.

Good/Bad/No Address: Indicates whether the address is good, bad, or blank. The label changes based on the condition of the address. If the label reads "Good," the address is good. If the label reads "Bad," the address is bad. If the label reads "No Address," all address components are blank.

Column 3

Relation to Account: Person's relation to the account. For example, the person is the primary responsible party on the account.

Is Responsible: If selected, the person is responsible for the account. For the primary party on the account, the system selects the check box and you cannot clear it. To add responsibility, you must have the Update Responsibility - Add Permission. To remove responsibility, you must have the Update Responsibility - Remove Permission.

Authorized: Person for whom the party is authorized to discuss the debt and pay on the account. For the primary party on the account, the system selects **None** and you cannot clear it.

Note: If you change the party's authorization to **None**, the system does the following:

- Removes the party's address, phone, and email address from the respective reference panels.
- Prevents the dialer from initiating calls to the party.
- Prevents users from requesting letters for the party. The system still processes pending letter requests unless you delete them before the due date.
- If there is an active arrangement on the account, the system prevents you from changing the authorization to **None** until you delete the arrangement.
- Retains previous payments, interactions, events, and notes for historical purposes.

National ID: Unique number the government issues to identify a person (for example, social security number).

Date of Birth: Contact person's date of birth.

Drivers License: Contact person's driver's license number.

Language: Contact person's preferred language.

Time Zone: Time zone associated to the contact person's address.

Observes DST: If selected, the system observes daylight savings time for the contact person's location.

2. Modify the information and then click **Save**.

Related Topics

Addresses

Email Addresses

Contact Information

Customers

Update Name Permission

Update Name Alias Permission

Update Responsibility - Add Permission

Update Responsibility - Remove Permission

Responsible Party Codes

Language Codes

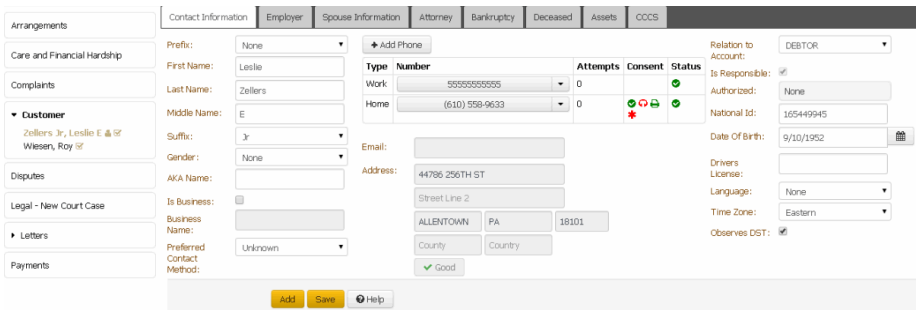
Feedback

Add a Party to an Account

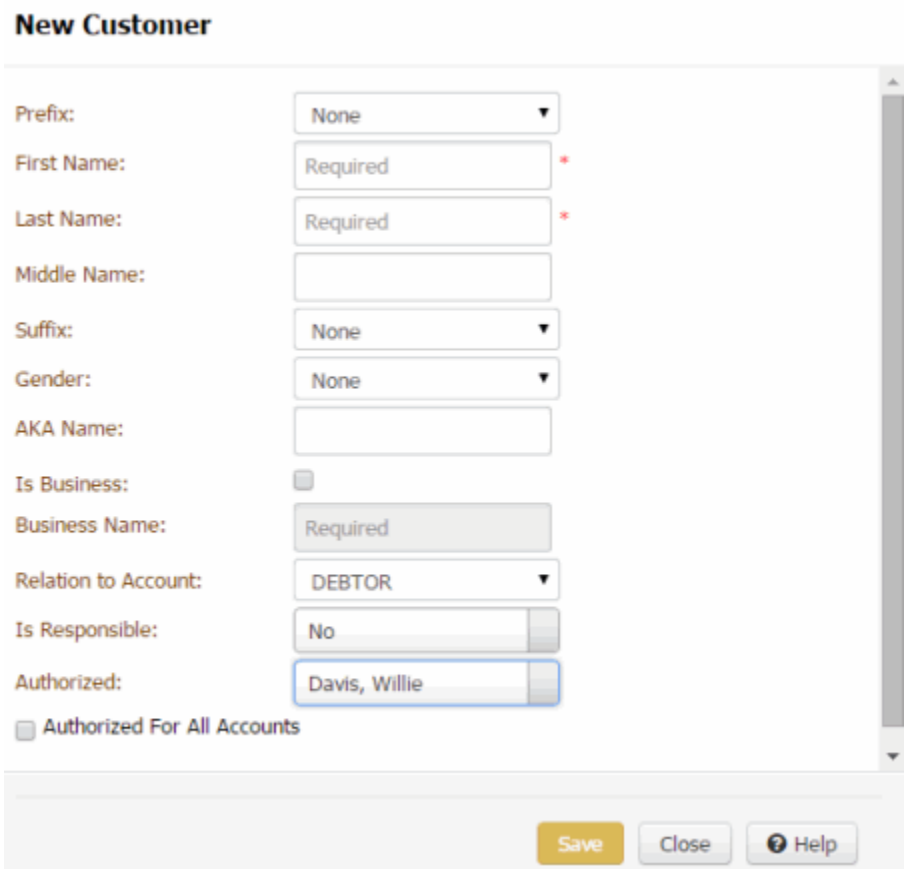
Use the **New Customer** dialog box to add a party to the account.

To add a party to an account

1. In the **Task Panel** navigation tree, click **Customer**.



2. Click the **Contact Information** tab and then click **Add**.



Prefix: Person's name prefix.

First Name: Person's first name.

Last Name: Person's last name.

Middle Name: Person's middle name.

Suffix: Person's name suffix.

Gender: Person's gender.

AKA Name: Another name the person uses.

Is Business: If selected, the party is a business rather than an individual.

Business Name: Name of the business. Required if you selected **Is Business**.

Relation to Account: Person's relation to the account. For example, the person is the primary responsible party on the account.

Is Responsible: If selected, the person is responsible for the account. For the primary party on the account, the system selects the check box and you cannot clear it.

Authorized: Person for whom the party is authorized to discuss the debt and pay on the account. This box is available when you select **No** in the **Is Responsible** box.

Authorized For All Accounts: If selected, the party is authorized to discuss the debts and pay on all the person's accounts. This check box is available when you select a name in the **Authorized** box.

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

Related Topics

Contact Information

Customers

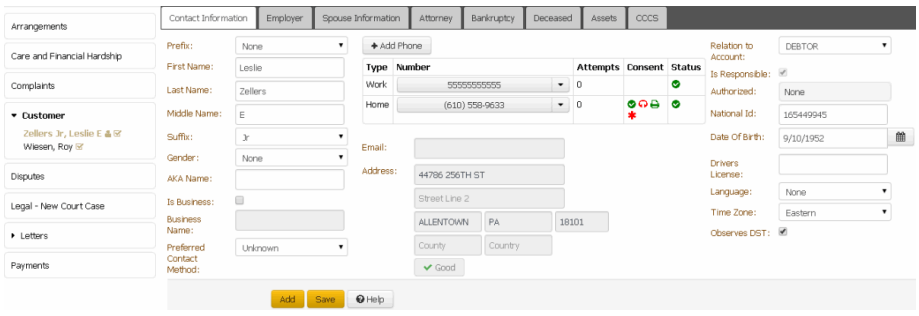
Responsible Party Codes

Flag an Account Address

Use the **Contact Information** tab to indicate that an address is good or bad for a party on the account.

To flag an account address

1. In the **Task Panel** navigation tree, click **Customer** and then click a name.



Good/Bad: Indicates whether the address is good or bad. The label changes based on the condition of the address.

2. Do the following:

   - To change a "good" address to "bad," click **Good**.
   - To change a "bad" address to "good," click **Bad**.

3. Click **Save**.

Related Topics

Contact Information

Customers

Feedback

Add a Phone Number to an Account

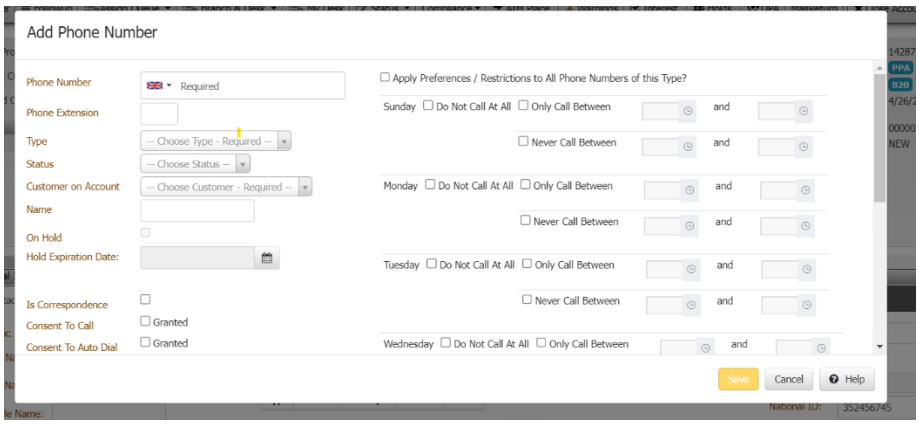
Use the **Add Phone Number** dialog box to add a party's phone number to the account. To add a phone number, you must have the Create Phone Numbers Permission.

To add a phone number to an account

1. Do one of the following:

   - In the **Task Panel** navigation tree, click **Customer** and then click a name. In the **Contact Information** tab, click **Add Phone**.
   - In the **Reference Panel** navigation bar, click **Available Panels** and then click **Phones**. In the **Phones** toolbar, click **Add Phone**.

   The **Add Phone Number** dialog box appears.



Phone Number: Person's phone number, including the country code. You can select the country from the list box or type a plus sign (+) and then the country code (for example, "+44" for United Kingdom).

Phone Extension: Phone extension.

Type: Type of phone number.

Status: Status of the phone number.

Customer on Account: Customer on the account.

Name: Name of the person associated to the phone number.

On Hold: If selected, the phone number is on hold.

Hold Expiration Date: Date the hold expires. If you don't specify a date, the hold remains until you clear the **On Hold** check box or remove the hold using another process.

Consent To Call: If selected, the person granted permission to call this phone number.

Consent To Auto Dial: If selected, the person granted permission to call this phone number using a dialer campaign.

Consent To SMS: If selected, the person granted permission to send a text message to this phone number.

Consent to fax: If selected, the person granted permission to send a fax to this phone number.

Obtained From: Person who granted or denied permission to contact this phone number.

Method: Indicates whether the person granted permission verbally or in writing.

Comment: More information regarding the phone number.

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

3. **Context Menu:**If selected, the person can set the restrictions or preferences for the future date and time, to send SMS.

Related Topics

Contact Information

Phones

Create Phone Numbers Permission

Feedback

Add an Email to an Account

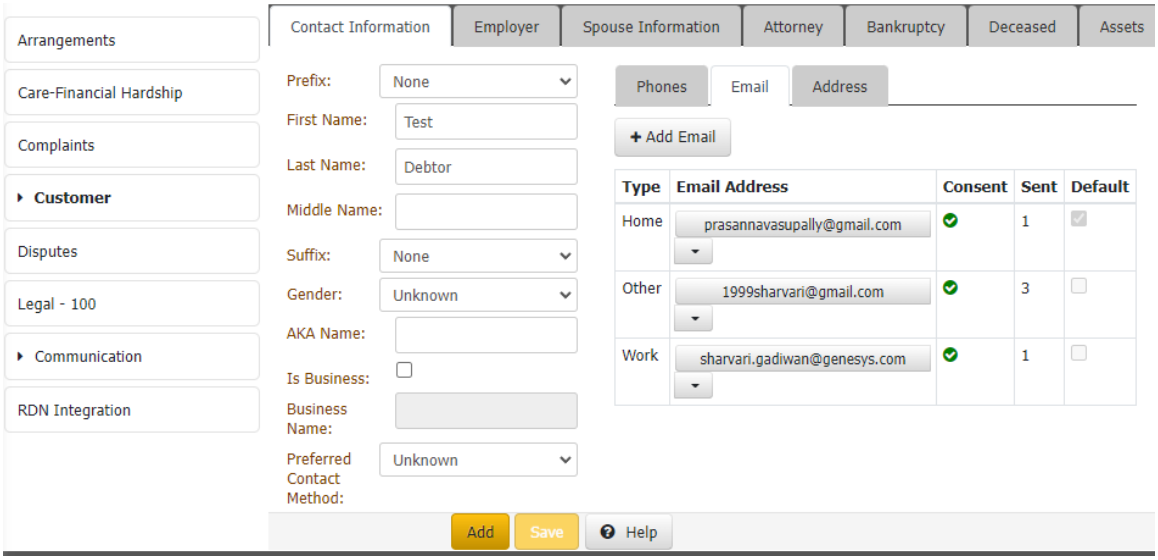
Use the **Add Email Address** dialog box to add an email address to the account.

To add an email address

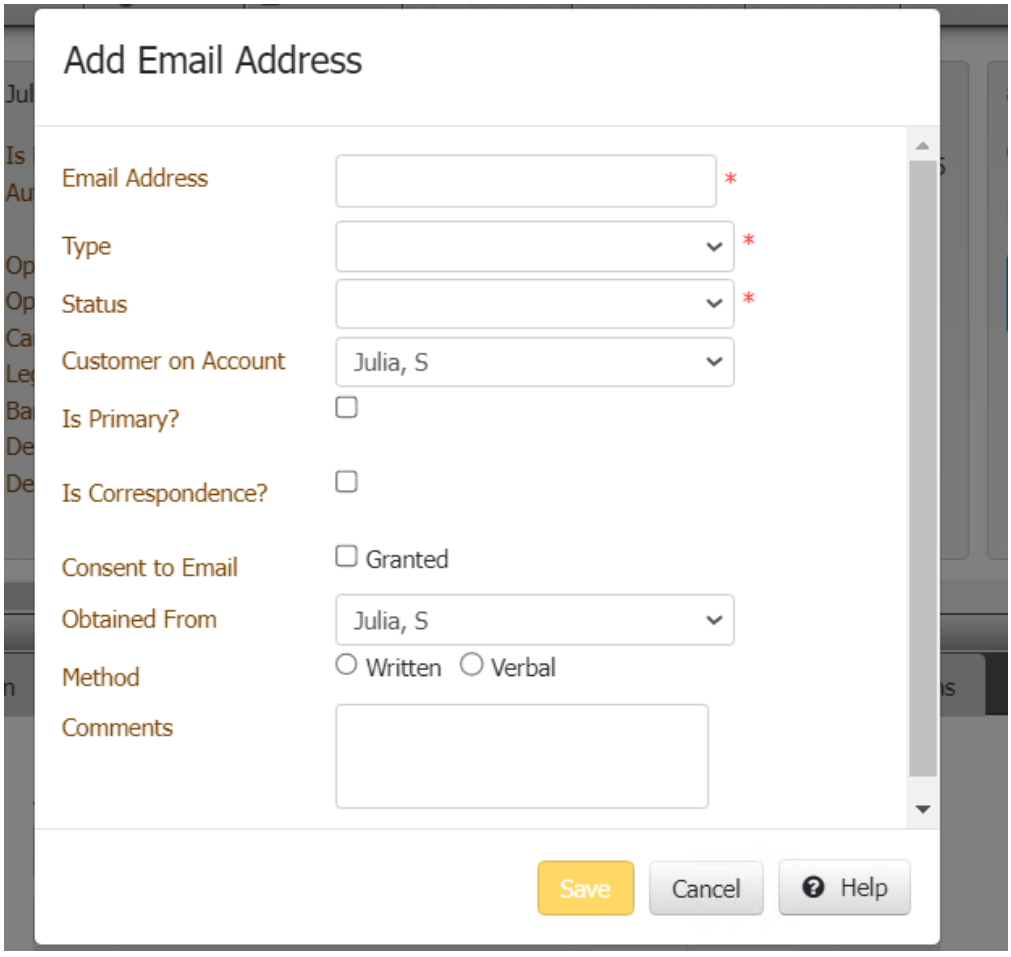
1. Do one of the following:

   - In the **Reference Panel** navigation bar, click **Available Panels** and then click **Email**. In the **Email** toolbar, click **Add Email**.

   - In the **Task Panel** navigation tree, click **Customer** and then click a name. In the **Contact Information** tab, click **Add an Em,il to an Account**.



2. In the **Email** toolbar, click **Add**.



Type: Type of email address, such as home or work.

Status: Status of the email address, such as good, bad, or unknown.

Customer on Account: Person associated to the email address.

Is Primary: If selected, the email address is the person's primary (default) email address.

Consent To Email: If selected, the person granted permission to send email messages to this email address. If cleared, the person denied permission to send email messages to this email address.

Obtained From: Name of the person who granted or denied permission to send email messages to this email address.

Method: Indicates whether the person granted permission verbally or in writing.

Comment: More information regarding the email address.

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

Related Topics

Data Grids

Feedback

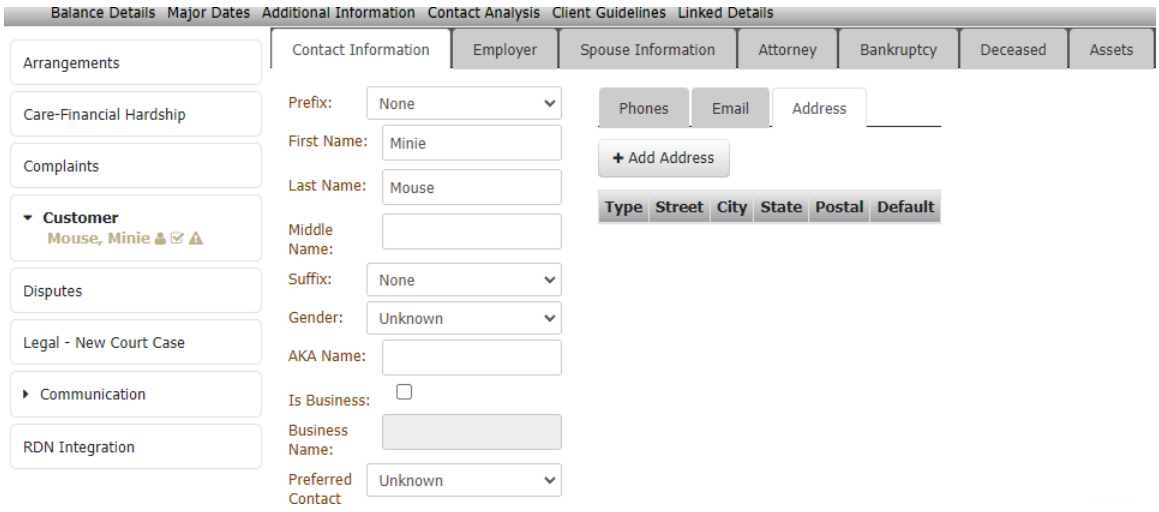
Add an Address to an Account

Use the **Add Address** dialog box to add an address to the account.

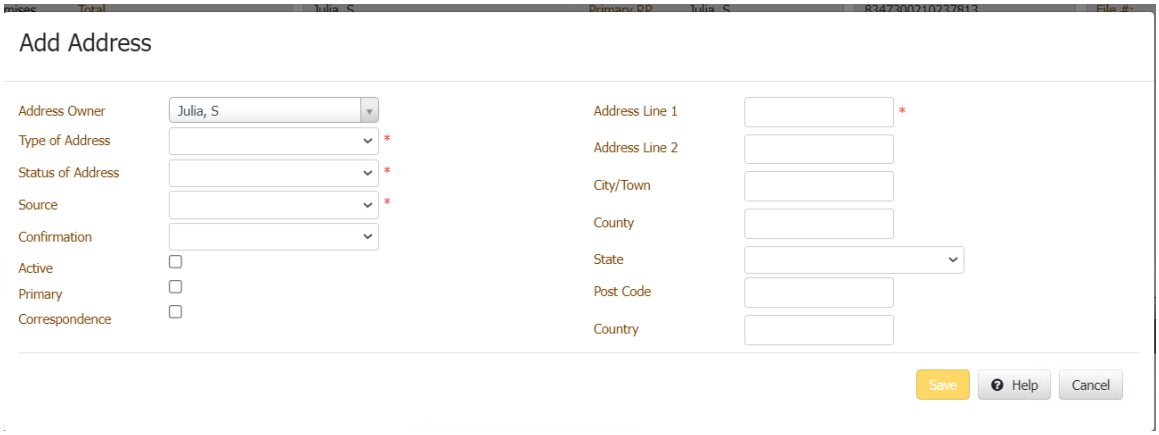
To add an address

1. Do one of the following

- In the **Reference Panel** navigation bar, click **Available Panels** and then click **Address.**
- In the **Task Panel** navigation tree, click **Customer** and then click a name. In the **Contact Information** tab, click **Address.**



2. In the **Address** toolbar, click **Add Address**.



Address Owner: Person associated to the address.

Type of Address: Type of address, such as home or work.

Status of Address: Status of the address, such as good, bad, or unknown.

Source: Source who provided the address, such as customer, client, or credit bureau.

Confirmation: Source who confirmed the validity of the address.

Active: If selected, the address is in use.

Primary: If selected, the address is the primary (main) address on the account.

Correspondence: If selected, you can send correspondence to this address.

Address line 1: Person's address line 1.

Address line 2: Person's address line 2.

City/Town: Person's city or town.

County: Person's county.

Post Code: Person's postal code.

Country: Person's country.

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

Feedback

Modify a Phone Number on an Account

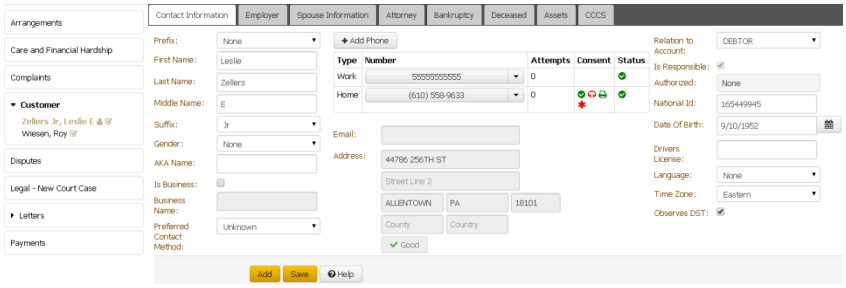
Use the **Edit Phone Number** dialog box to modify phone information for a party on the account. To modify phone numbers, you must have the Update Phone Numbers Permission. To modify phone consent options, you must have the Change Phone Consent Permission. The system records phone number changes in the **Notes** panel.

Note: If the system administrator configured the Mask Phone Numbers Permission, the system replaces all or parts of the phone number with asterisks (*), depending on the configuration.

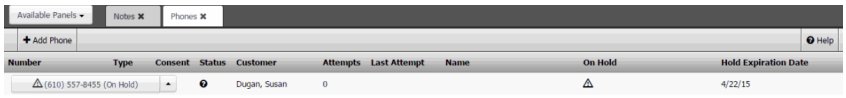
To modify a phone number on an account

1. Do one of the following:

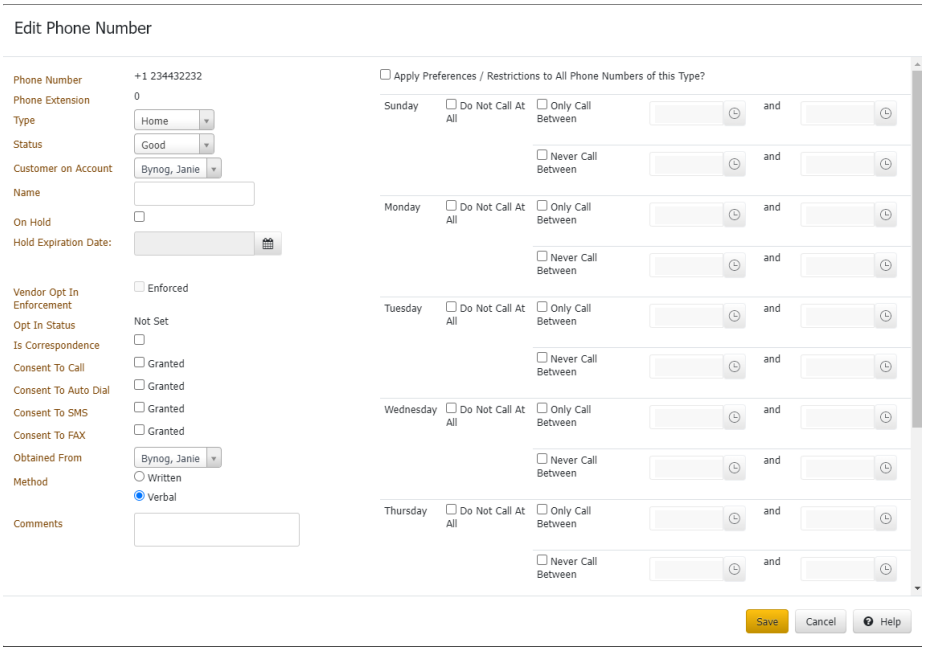
- In the **Task Panel** navigation tree, click **Customer** and then click a name. The **Contact Information** tab appears.



- In the **Reference Panel** navigation bar, click **Available Panels** and then click **Phones**. The **Phones** panel appears.



2. Click the arrow next to the phone number and then click **Edit**.



Phone Number: Person's phone number, including the country code. You can select the country from the list box or type a plus sign (+) and then the country code (for example, "+44" for United Kingdom). You cannot modify the phone number.

Phone Extension: Phone extension. You cannot modify the phone extension.

Type: Type of phone number. To modify the phone type, you must have the Update Phone Type Permission.

Status: Status of the phone number. To modify the phone status, you must have the Update Phone Status Permission.

Customer on Account: Customer on the account.

Name: Name of the person associated to the phone number.

On Hold: If selected, the phone number is on hold.

Hold Expiration Date: Date the hold expires. If you don't specify a date, the hold remains until you clear the **On Hold** check box or remove the hold using another process.

Vendor Opt In Enforcement: Vendor Opt In Enforcement indicates if the SMS vendor enforces Opt In.

Opt In Status: Opt-In Status is the current Opt-In Status on the SMS vendor side

Consent To Call: If selected, the person granted permission to call this phone number.

Consent To Auto Dial: If selected, the person granted permission to call this phone number using a dialer campaign.

Consent To SMS: If selected, the person granted permission to send a text message to this phone number.

Consent to fax: If selected, the person granted permission to send a fax to this phone number.

Obtained From: Person who granted or denied permission to contact this phone number.

Method: Indicates whether the person granted permission verbally or in writing.

Comment: More information regarding the phone number.

Apply Preferences/Restrictions to all Phone Numbers of this Type?: If selected, preferred day and time to call, can be captured for this phone type.

3. Modify the information and then click **Save**.

Related Topics

Contact Information

Phones

Update Phone Numbers Permission

Update Phone Status Permission

Update Phone Type Permission

View Preferred Time To Call Details

Feedback

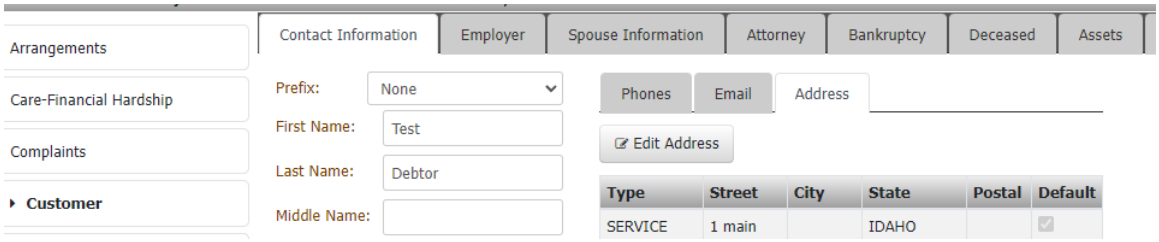
Modify an Address to an account

Use the **Edit Address** dialog box to modify an address for the account.

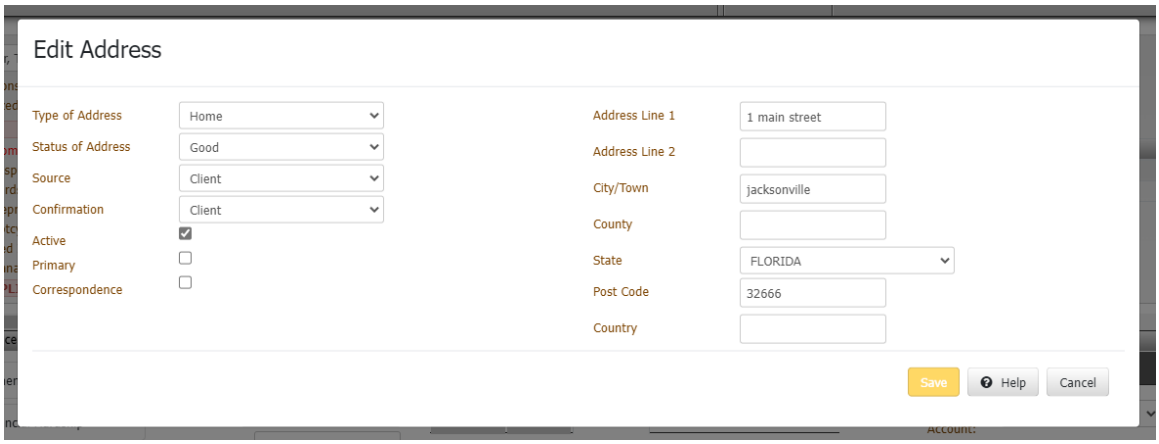
To modify an email address

1. Do one of the following:

   - In the **Reference Panel** navigation bar, click **Available Panels** and then click **Address.**
   - In the **Task Panel** navigation tree, click **Customer** and then click a name. In the **Contact Information** tab, click **Address.**



2. **In the data grid, click the address and then, in the Address toolbar, click Edit Address.**



Type of Address: Type of address, such as home or work.

Status of Address: Status of the address, such as good, bad, or unknown.

Source: Source who provided the address, such as customer, client, or credit bureau.

Confirmation: Source who confirmed the validity of the address.

Active: If selected, the address is in use.

Primary: If selected, the address is the primary (main) address on the account.

Correspondence: If selected, you can send correspondence to this address.

Address line 1: Person's address line 1.

Address line 2: Person's address line 2.

City/Town: Person's city or town.

County: Person's county.

Post Code: Person's postal code.

Country: Person's country.

3. Modify the information and then click **Save**.

Note: If the person whose address you modified has other accounts, Latitude updates the address on those accounts also.

Feedback

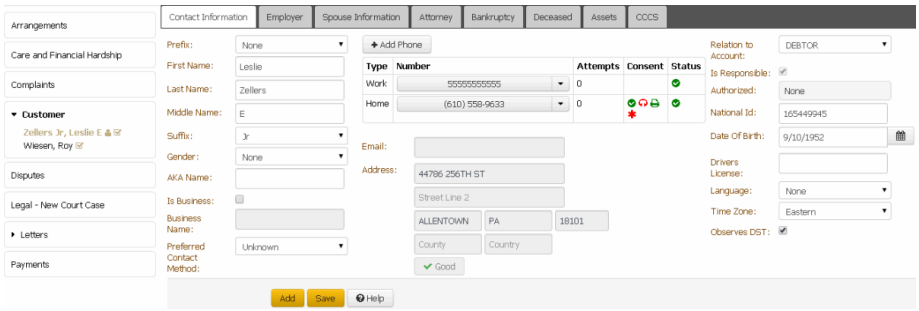
Change the Status of an Account Phone Number

Use the **Contact Information** tab or the **Phones** panel to change the status of a phone number on the account. You must have the Update Phone Status Permission.

To change the status of an account phone number

1. Do one of the following:

   - In the **Task Panel** navigation tree, click **Customer** and then click a name. The **Contact Information** tab appears.



   - In the **Reference Panel** navigation bar, click **Available Panels** and then click **Phones**. The **Phones** panel appears.

2. Click the arrow next to the phone number and then click the status (**Good** or **Bad**).

Related Topics

Data Grids

Contact Information

Phones

Update Phone Status Permission

Dial a Phone Number

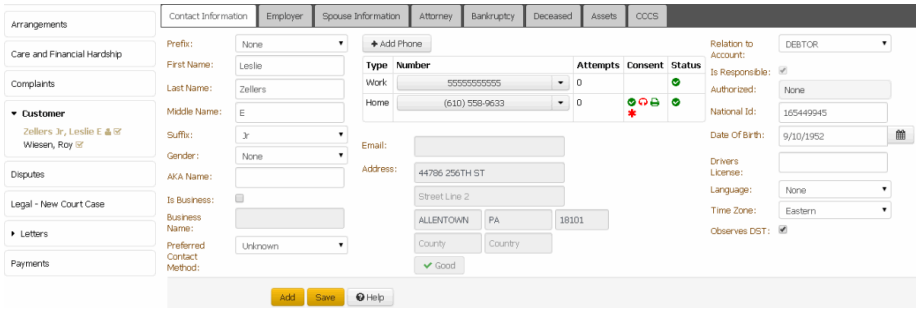
Use the **Contact Information** tab or the **Phones** panel to dial a phone number on the account. You can dial a phone number directly under the following conditions:

- Dialer is present.
- User is not on a call currently through manual or campaign dialing.
- **Consent To Call** option is selected, indicating that the person granted permission to call the phone number.
- Phone status is "Good."

To dial a phone number

1. Do one of the following:

- In the **Task Panel** navigation tree, click **Customer** and then click a name. The **Contact Information** tab appears.



- In the **Reference Panel** navigation bar, click **Available Panels** and then click **Phones**. The **Phones** panel appears.

2. Click the arrow next to the phone number and then click **Dial Number**. If the conditions for dialing a phone number are met, Latitude places the call.

Related Topics

Data Grids

Contact Information

Phones

Update Phone Status Permission

Feedback

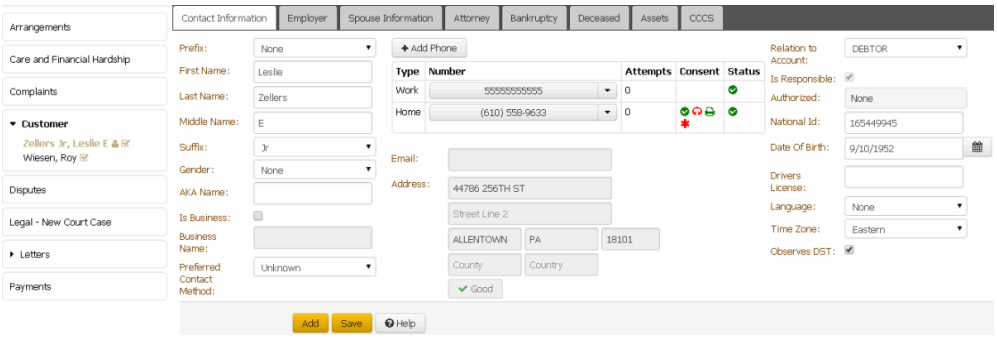
Add a Phone Contact Result

Use the **Contact Information** tab or the **Phones** panel to add the result of contacting a party on the account. The system records these changes in the **Notes** panel.

To add a phone contact result

1. Do one of the following:

   - In the **Task Panel** navigation tree, click **Customer** and then click a name. The **Contact Information** tab appears.



- In the **Reference Panel** navigation bar, click **Available Panels** and then click **Phones**. The **Phones** panel appears.

2. Click the arrow next to the phone number and then click the contact result. For example, No Answer, Line Busy, Bad Number, Left Message Person, and Left Message Machine.

Related Topics

Data Grids

Contact Information

Phones

Feedback

Phone Number Status Icons

The status indicates the state of an account phone number. The following table lists the phone number status icons and their description.

Icon	Description
	The status of the phone number is unknown.
	The phone number is bad.
	The phone number is good.
	The phone number is on hold.

Related Topics

Maintain Contact Information

View Phone Numbers for an Account

Feedback

Phone Usage Consent Icons

Phone Usage Consent icons represent the permissions the customer granted or denied for a phone number. The following table lists the phone usage consent icons and their description. A green icon indicates that the customer granted permission and a red icon indicates that the customer denied permission.

Icon	Description
	Indicates whether the customer granted permission to call this phone number.
	Indicates whether the customer granted permission to call this phone number using a dialer.
	Indicates whether the customer granted permission to fax this phone number.
	Indicates whether the customer granted permission to text this phone number.

Related Topics

Maintain Contact Information

View Phone Numbers for an Account

Feedback

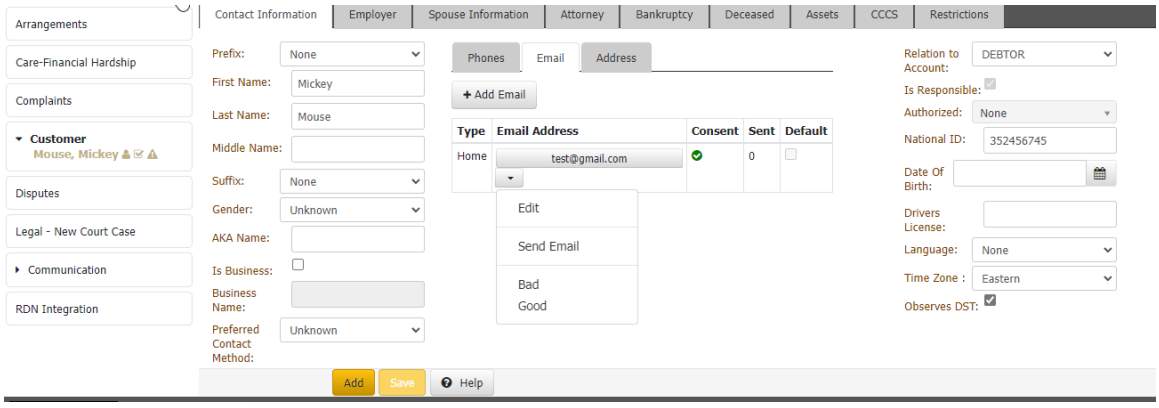
Send Email to an Account

Use to send an Email from the selected record of the available Home/Work type Email.

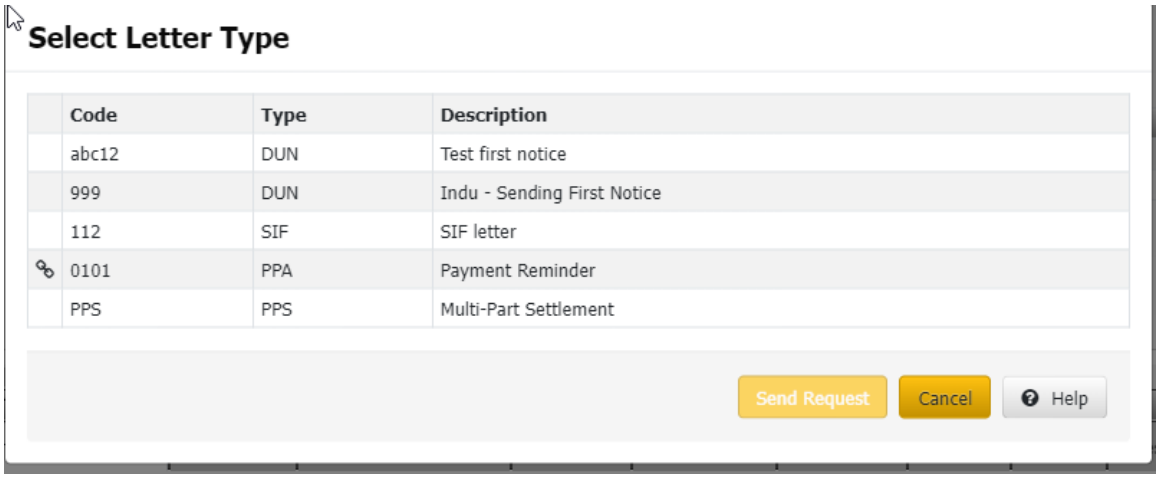
To send an Email:

Do the following:

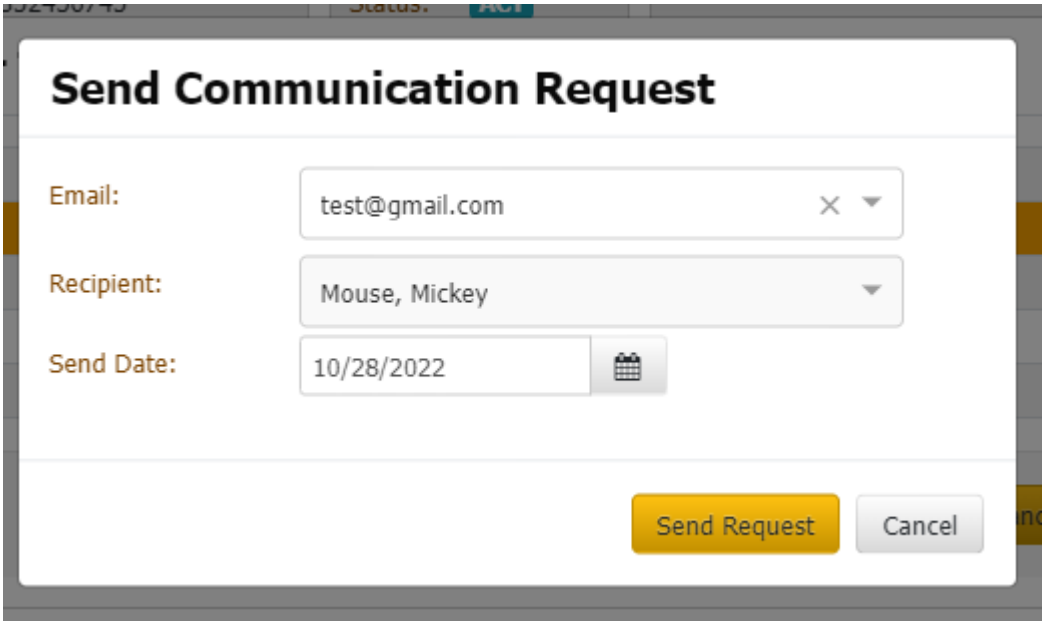
- In the **Task Panel** navigation tree, click **Customer** and then click a name. The **Contact Information** tab appears then,
- Select **Email** from Context Menu then click Arrow choose **Send Email.**



- The list of Letter types will show, select any one and then click **Send request.**

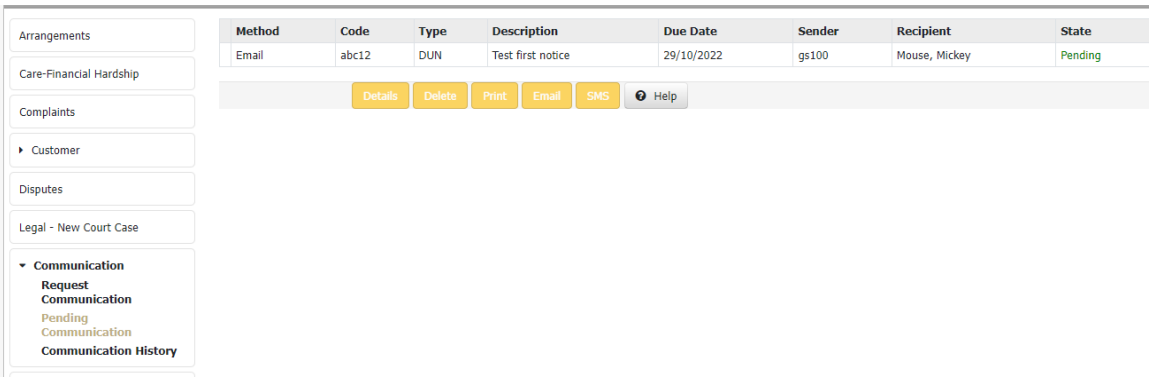


- While sending **Communication Request** select Date, it can be **Current Date/Future Date**, then click **Send Request.**



- Choosing the **Future Date**, the Communication request shows in the **Pending Communication Panels.**

1.



Feedback

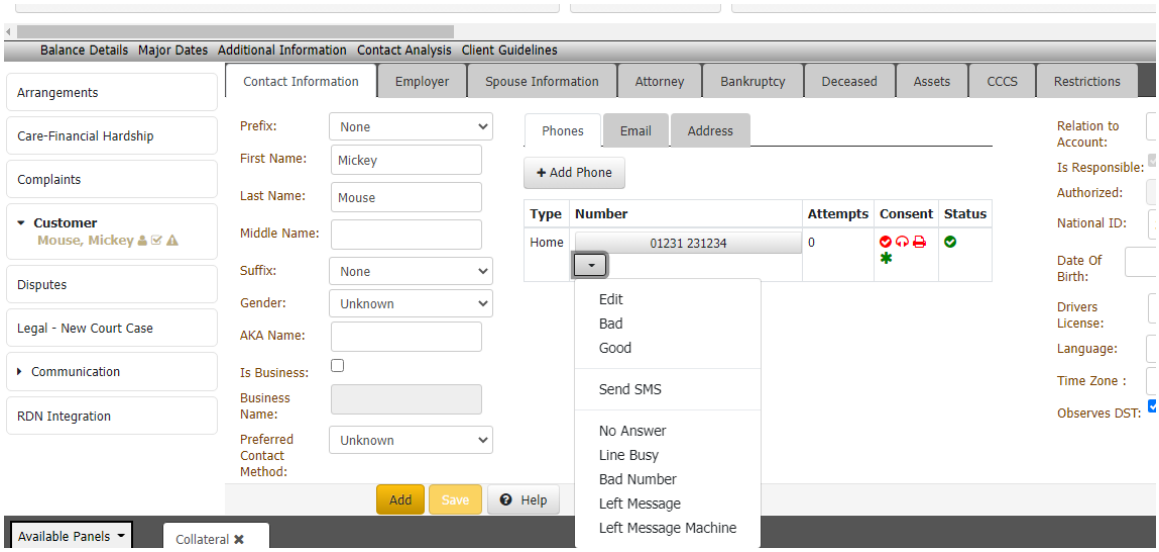
Send SMS to an Account

Use to send an SMS from the selected record.

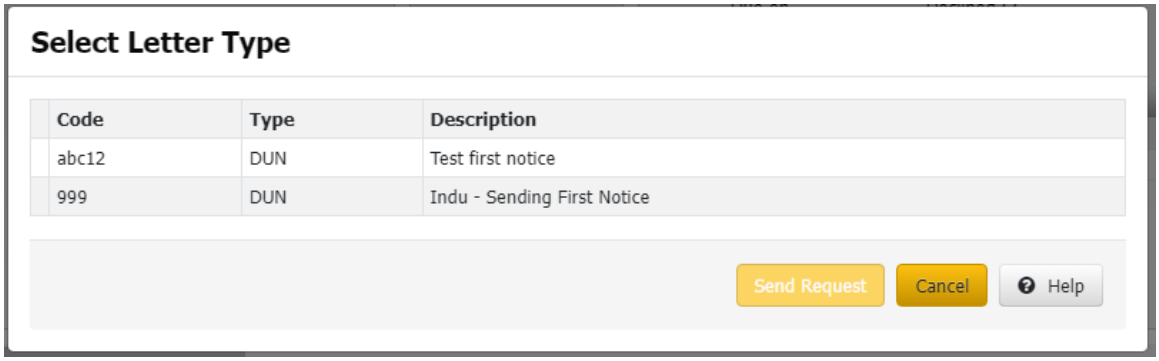
To send an SMS:

Do the following:

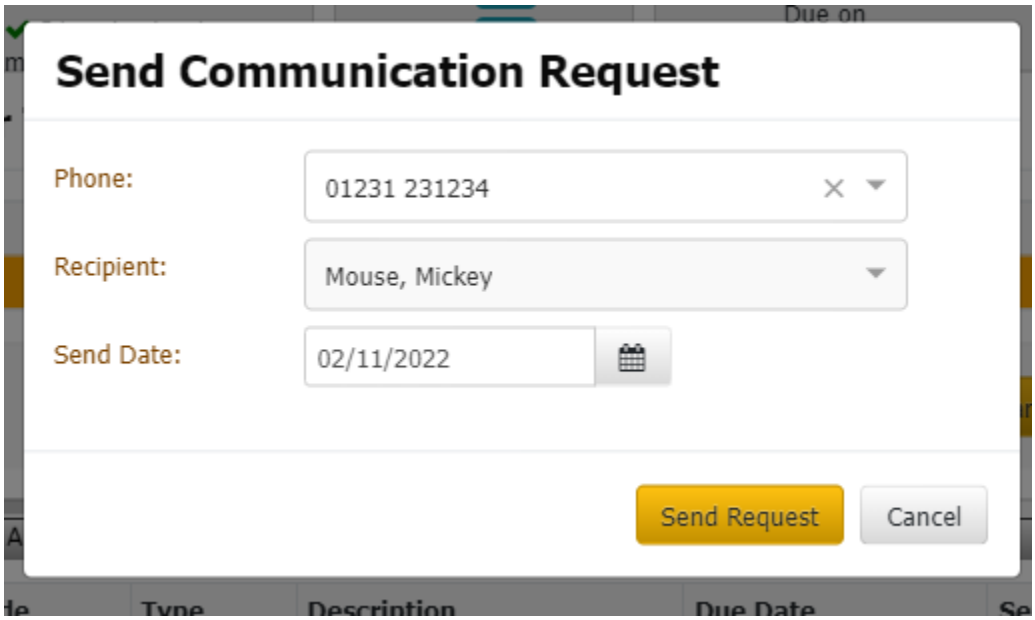
- In the **Task Panel** navigation tree, click **Customer** and then click a name. The **Contact Information** tab appears then
- Select SMS from Context Menu then click Arrow choose **Send SMS.**



- The list of Letter types will show, select any one and then click **Send request.**

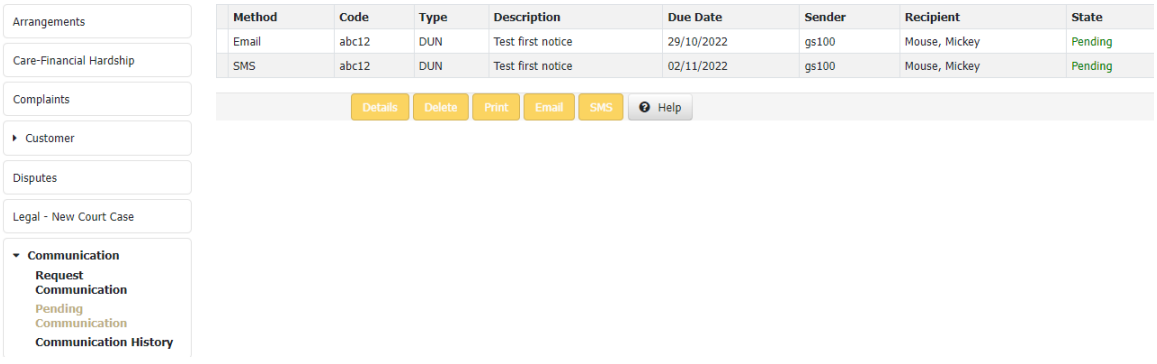


- While sending **Communication Request** select Date, it can be **Current Date/Future Date**, then click **Send Request.**



2. Choosing the Future Date, the Communication request shows in the **Pending Communication Panels.**

3.



Feedback

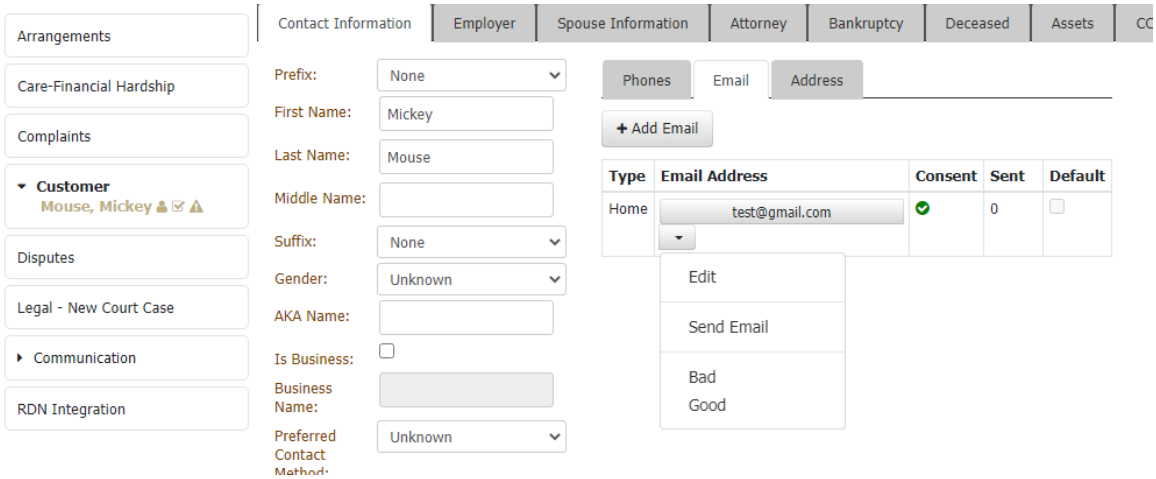
Change the Status of an Email

Use the **Contact Information** tab or the **Email** panel to change the status of an Email on the account.

To change the status of an account Email.

1. Do one of the following:

    - In the **Task Panel** navigation tree, click **Customer** and then click a name. The **Contact Information** tab appears.



2. Click the arrow next to the **Email** and then click the status (**Good** or **Bad**).

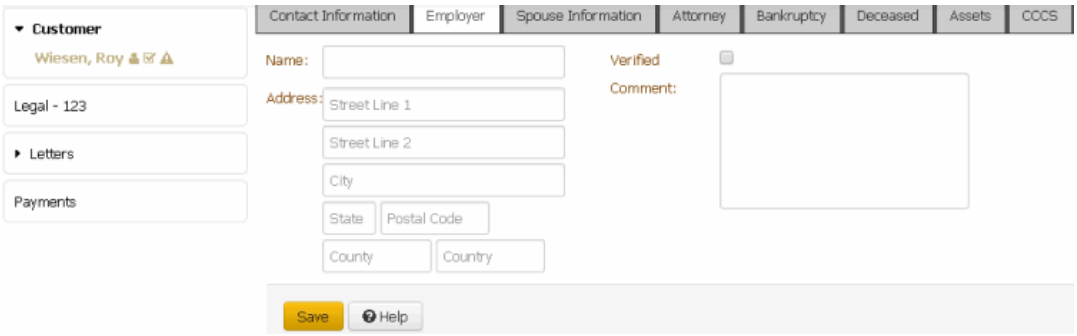
Feedback

Maintain Employer Information

Use the **Employer** tab to maintain employment information for a party on the account.

To maintain employer information

1. In the **Task Panel** navigation tree, click **Customer** and then click a name.
2. Click the **Employer** tab.



Name: Name of customer's employer.

Address: Employer's street address, city, state, postal code, county, and country.

Verified: If selected, you verified the employer's information. If you change any of the employer's information, the system clears the check box and you have to reverify the information.

Comment: Comments regarding the person's employer.

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

Related Topics

Contact Information

Customers

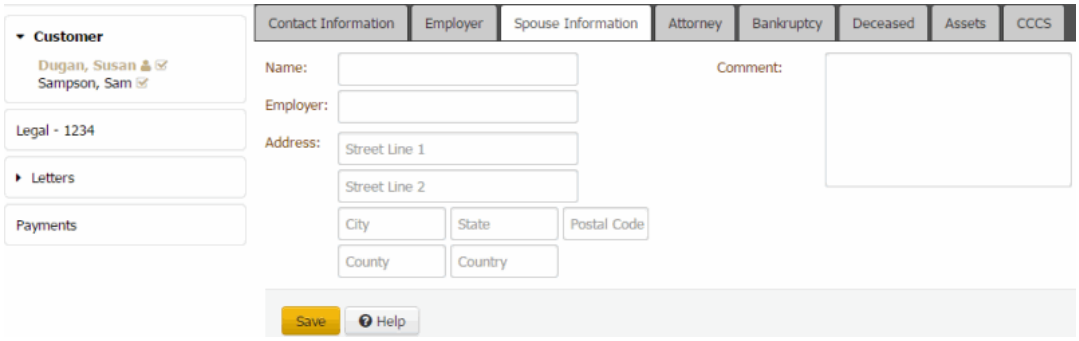
Feedback

Maintain Spouse Information

Use the **Spouse Information** tab to maintain spousal information for a party on the account.

To maintain spouse information

1. In the **Task Panel** navigation tree, click **Customer** and then click a name.
2. Click the **Spouse Information** tab.



Name: Name of the customer's spouse.

Employer: Name of the spouse's employer.

Address: Spouse's employer's street address, city, state, postal code, county, and country.

Comment: Comments regarding the spouse or the spouse's employer.

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

Related Topics

Contact Information

Customers

Feedback

Maintain Attorney Information

Use the **Attorney** tab to maintain attorney information for a party on the account.

To maintain attorney information

1. In the **Task Panel** navigation tree, click **Customer** and then click a name.
2. Click the **Attorney** tab.

Name: Name of the attorney.

Firm: Name of the attorney's legal firm.

Address: Attorney's street address, city, state, postal code, county, and country.

Phone: Attorney's phone number.

Email: Attorney's email address.

Fax: Attorney's fax number.

Comment: Comments regarding the attorney.

3. Do one of the following:
   - To add or modify attorney information, complete the information and then click **Save**.
   - To remove the attorney from the account, click **Delete** and then, in the confirmation dialog box, click **OK**.

Related Topics

Contact Information

Customers

Bankruptcy

Bankruptcy

Use the **Bankruptcy** tab to maintain bankruptcy information for a party on the account. The system recognizes an account as being in bankruptcy when you provide the chapter, case number, and date filed.

Related Topics

Maintain General Bankruptcy Information

Maintain Court Information

Maintain Trustee Information

Maintain Bankruptcy Comments

Customers

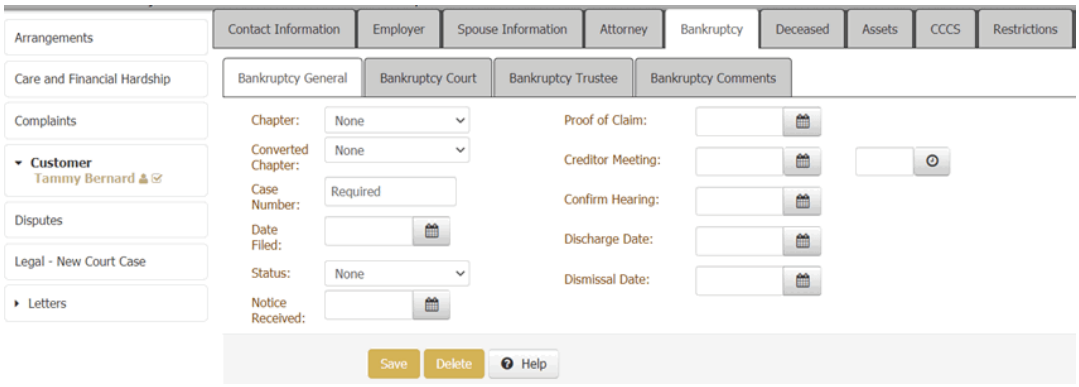
Feedback

Maintain General Bankruptcy Information

Use the **Bankruptcy General** tab to maintain general bankruptcy information. Some information on this tab is available for use in merge letters.

To maintain general bankruptcy information

1. In the **Task Panel** navigation tree, click **Customers** and then click a name.
2. Click the **Bankruptcy** tab and then click the **Bankruptcy General** tab.



Chapter: Bankruptcy chapter number. The information available on the **Bankruptcy General** tab is based on the bankruptcy chapter selected.

Converted Chapter: If the customer filed bankruptcy under a different chapter originally, the original bankruptcy chapter number.

Case Number: Case number the court assigned to the bankruptcy.

Date Filed: Date the customer filed the case with the bankruptcy court.

Status: Status of the bankruptcy.

Notice Received: Date the client received a notice that the customer filed for bankruptcy.

Proof of Claim: Date the client sent a proof of claim to the court.

Creditor Meeting: Date and time of the creditor meeting.

Confirm Hearing: Date the court set the confirmation hearing.

Discharge Date: Date the court discharged the bankruptcy.

Dismissal Date: Date the court dismissed the bankruptcy.

Has Asset: If selected, indicates that the customer has assets to secure the debt. This check box displays for chapter 7 only.

Method: Method through which the court discharges account. This list box displays for chapter 7 only. Valid values are:

None: Customer didn't specify a method.

No Intention to Reaffirm: Customer or the customer's attorney didn't file.

Reaffirmation: Customer reaffirmed the debt under new terms. The following boxes appear when you select this option:

- **Reaffirmation Amount:** Amount that the customer reaffirmed to pay.
- **Reaffirmation Filed Date:** Date the customer filed the reaffirmation with the court.
- **Reaffirmation Terms:** Agreed upon terms of the reaffirmation.

Surrender: Customer chose to surrender collateral. The following boxes appear when you select this option:

- **Surrender Date:** Date the customer surrendered the item.
- **Surrender Method:** Indicates how the customer surrendered the item (for example, shipped or picked up).
- **Auction House:** Name of the auction house that auctioned the surrendered item.
- **Auction Date:** Date the auction house auctioned the surrendered item.
- **Auction Amount:** Amount the auction house received for the surrendered item.
- **Auction Fee:** Fee the auction house charged for auctioning the surrendered item.
- **Auction Amount Applied:** Amount of the auction funds applied to the account.

Voluntary: Customer chose to pay off the debt voluntarily, possibly under new terms, without officially filing through the court. The following boxes appear when you select this option:

- **Voluntary Date:** Date the customer volunteered to pay off the debt.
- **Voluntary Amount:** Amount the customer volunteered to pay.
- **Terms:** Terms of the voluntary payment agreement.

Claim Type: Indicates whether the debt is secured, unsecured, or split. This list box displays for chapters 11, 12, and 13 only.

Secured Amount: Amount of the debt that is secured. This box displays for chapters 11, 12, and 13 only.

Unsecured Amount: Amount of the debt that is unsecured. This box displays for chapters 11, 12, and 13 only.

Secured Plan Percent: Percentage of the secured amount for which the customer remains responsible. This box displays for chapters 11, 12, and 13 only.

Unsecured Plan Percent: Percentage of the unsecured amount for which the customer remains responsible. This box displays for chapters 11, 12, and 13 only.

3. Complete the information and then click **Save**.
4. To delete the information, click **Delete**.

Related Topics

Bankruptcy

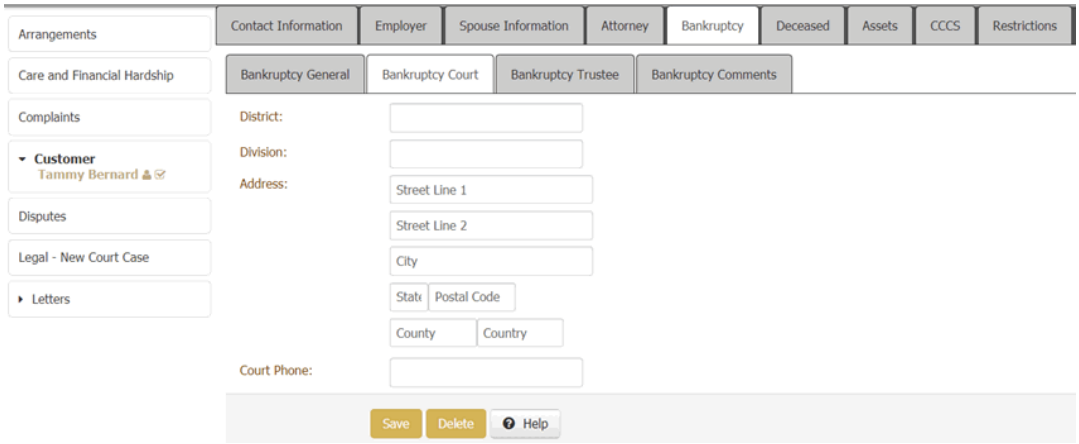
Feedback

Maintain Court Information

Use the **Bankruptcy Court** tab to maintain court information. Some information on this tab is available for use in merge letters.

To maintain court information

1. In the **Task Panel** navigation tree, click **Customers** and then click a name.
2. Click the **Bankruptcy** tab and then click the **Bankruptcy Court** tab.



District: Court district.

Division: Court division.

Address: Court's street address, city, state, postal code, county, and country.

Court Phone: Court phone number.

3. Complete the information and then click **Save**.
4. To delete the information, click **Delete**.

Related Topics
Bankruptcy

Feedback

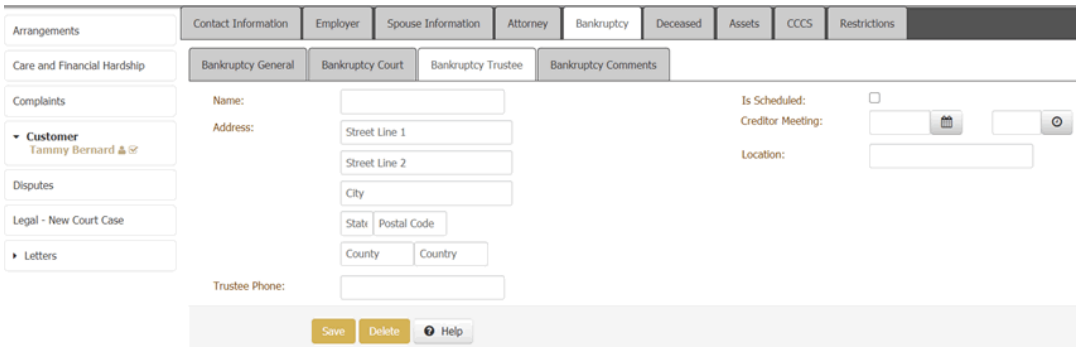
Maintain Trustee Information

Use the **Bankruptcy Trustee** tab to maintain trustee information. Some information on this tab is available for use in merge letters.

To maintain trustee information

1. In the **Task Panel** navigation tree, click **Customers** and then click a name.

2. Click the **Bankruptcy** tab and then click the **Bankruptcy Trustee** tab.



Name: Trustee's name.

Address: Trustee's street address, city, state, postal code, county, and country.

Trustee Phone: Trustee's phone number.

Is Scheduled: If selected, the court scheduled a creditor meeting.

Creditor Meeting: Date and time of the creditor meeting.

Location: Location of the creditor meeting.

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

4. To delete the information, click **Delete**.

Related Topics
Bankruptcy

Feedback

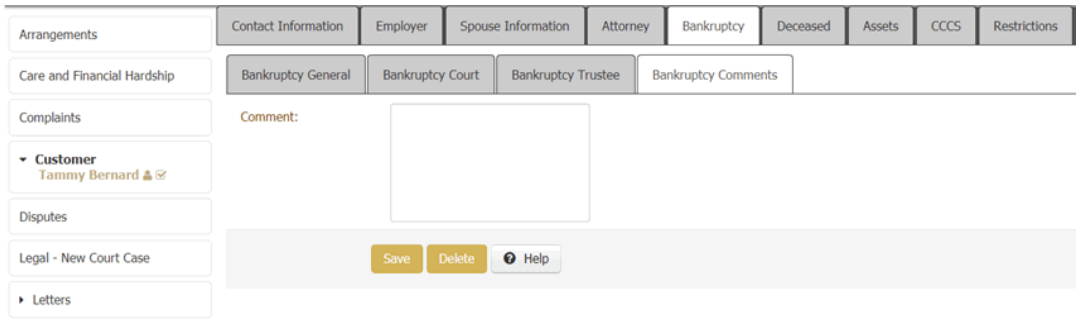
Maintain Bankruptcy Comments

Use the **Bankruptcy Comments** tab to maintain bankruptcy comments. Information on this tab is not available for use in merge letters.

To maintain bankruptcy comments

1. In the **Task Panel** navigation tree, click **Customers** and then click a name.

2. Click the **Bankruptcy** tab and then click the **Bankruptcy Comments** tab.



3. In the **Comment** box, type a comment and then click **Save**.

4. To delete the comments, click **Delete**.

Related Topics

Bankruptcy

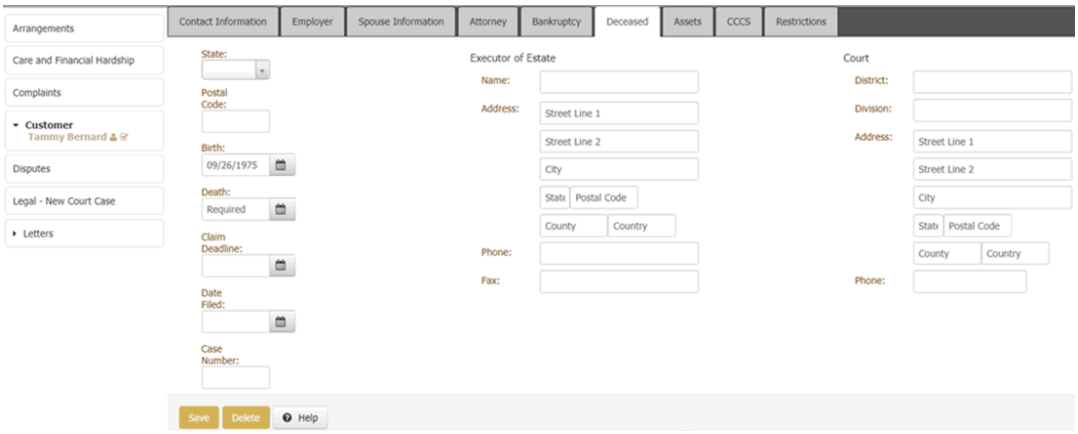
Feedback

Maintain Deceased Information

Use the **Deceased** tab to maintain information regarding a deceased party on the account. If your organization installed an import interface, the system imports information into this panel. Otherwise, you can add the information manually. For deceased permissions, see the Deceased Permission.

To maintain deceased information

1. In the **Task Panel** navigation tree, click **Customer** and then click a name.
2. Click the **Deceased** tab.



State: State where the customer's death occurred.

Postal Code: Postal code (for example, postal code) where the customer's death occurred.

Birth: Customer's date of birth.

Death: Customer's date of death.

Claim Deadline: Deadline for filing a claim against the customer's estate.

Date Filed: Date the client filed a claim against the customer's estate.

Case Number: Claim case number.

Executor of Estate

Name: Name of the executor of the customer's estate.

Address: Executor's street address, city, state, postal code, county, and country.

Phone: Executor's phone number.

Fax: Executor's fax number.

Court

District: Court district handling the customer's estate.

Division: Court division handling the customer's estate.

Address: Court's street address, city, state, postal code, county, and country.

Phone: Court's phone number.

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

Related Topics

Contact Information

Customers

Feedback

Maintain Assets

Use the **Assets** tab to maintain assets for a party on the account.

To maintain assets

1. In the **Task Panel** navigation tree, click **Customer** and then click a name.
2. Click the **Assets** tab.

Asset Name/Title: Name or description of the asset.

Asset Type: Type of asset.

Current Value: Current value of the asset.

Is Verified: A green check mark indicates that you verified the asset value. A red "x" indicates that you didn't verify the asset value.

Lien Amount: Amount held against the asset.

Is Verified: A green check mark indicates that you verified the lien amount. A red "x" indicates that you didn't verify the lien amount.

Description: More information regarding the asset.

3. To add an asset, click **Add**, complete the information, and then click **Save**.
4. To modify an asset, click **Edit**, modify the information, and then click **Save**.
5. To delete an asset, click **Delete** and then, in the confirmation dialog box, click **OK**.

Related Topics

Contact Information

Customers

Asset Types

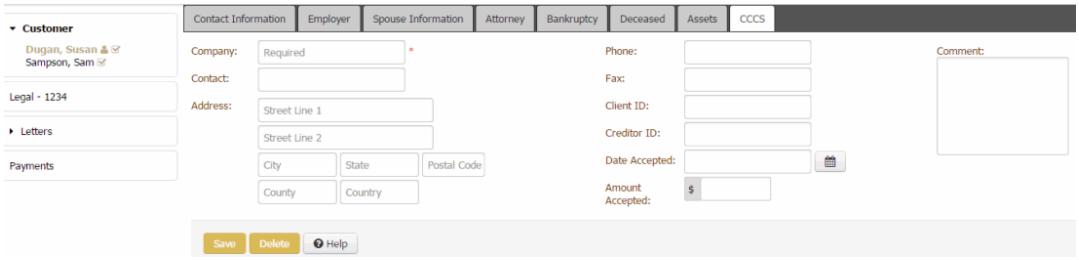
Feedback

Maintain CCCS Information

Use the **CCCS** tab to maintain Consumer Credit Counseling Service (CCCS) information for a party on the account. CCCS is an entity that a person engages to negotiate settlement or payment arrangements on a debt.

To maintain CCCS information

1. In the **Task Panel** navigation tree, click **Customer** and then click a name.
2. Click the **CCCS** tab.



Company: Name of the customer's CCCS company.

Contact: Name of the customer's CCCS counselor.

Address: CCCS counselor's street address, city, state, postal code, county, and country.

Phone: CCCS counselor's phone number.

Fax: CCCS counselor's fax number.

Client ID: Code that CCCS assigned to identify the customer.

Creditor ID: Code that CCCS assigned to identify the collection agency.

Date Accepted: Date the CCCS counselor accepted the filing.

Amount Accepted: Amount of the debt the customer is to pay.

Comment: Comments regarding the CCCS arrangement.

3. Complete the information and then click **Save**.
4. To delete the information, click **Delete** and then, in the confirmation dialog box, click **Yes**.

Related Topics

Contact Information

Customers

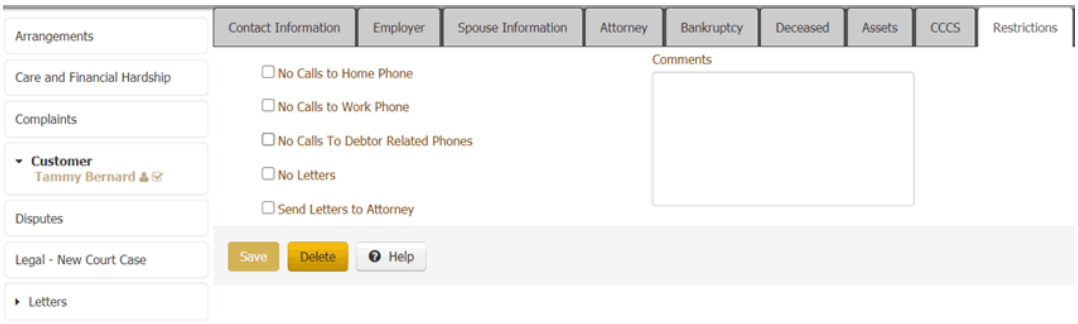
Maintain Account Restrictions

Use the **Restrictions** tab to set restrictions that indicate an account requires special handling. If a debtor account includes attorney, bankruptcy, deceased, or CCCS information, the system flags the account as having a restriction.

To maintain account restrictions

1. In the **Task Panel** navigation tree, click **Customer** and then click a name.

2. Click the **Restrictions** tab.



No calls to home phone: If selected, do not make calls to the debtor's home phone.

No calls to work phone: If selected, do not make calls to the debtor's work phone.

No calls to Debtor related phones: If selected, do not make calls to any of the debtor's phone numbers.

No Letters: If selected, do not send letters to the debtor.

Send Letters to Attorney: If selected, the system sends letters to the debtor's attorney. Complete the **Attorney** tab before selecting this check box.

Note: If you create a letter and use the **Subject Debtor Merge** fields, the letter goes to the debtor, not the attorney.

Comments: More information regarding the restriction.

3. To set a restriction, select the check box.
4. To remove a restriction, clear the check box.
5. To save the restriction, click **Save**.
6. To delete a restriction, click **Delete**.

Feedback

Customer Icons

The following table lists the customer icons and their description. When applicable, these icons appear next to the customer's name under the Customers heading in the navigation bar.

Icon	Description
	This customer is the primary person on the account.
	This customer is responsible for the account.
	This customer has warning messages associated to the account.

Related Topics

Contact Information

Customers

Arrangements

Feedback

Arrangements

Use the **Arrangements** panel to create proposed payment arrangements and convert them to scheduled arrangements for the account and any selected joined accounts. Parties only need one arrangement to cover their total liability (their joint accounts plus any individual accounts with the same client) regardless of the number of accounts. Any party on a joint account can arrange to pay the joint balance in full. The system reflects payments applied to a joined account on the balance of the linked parties' total liability.

Joined accounts

You can pursue each party on a joined account individually as all parties are responsible for the debt. The parties appear in dialing campaigns, letter campaigns, and work queues as if they had separate debts. For example, party A has joint responsibility for a debt and has an individual account. When you contact party B about the joint account, the system doesn't include the individual account for party A as part of the balance that party B owes.

A party on a joint account can offer payment to cover the liability for all parties on the account. You remove the other parties' liability to pay (but not their responsibility). If one party claims liability, you cannot contact the other parties for payment unless the primary party defaults on the arrangement. For example, if party A takes sole liability for the joint account with party B, you cannot contact party B about the joint account. You can, however, contact party B about other individual accounts that belong to party B. If party A's arrangement fails, you reinstate liability and pursue party B. Don't apply payments to the joint account that you receive from a party relieved of their joint liability unless:

- The party relieved of liability doesn't have a sole liability account to apply the payment.
- The party solely responsible for the joint account specifically requests that you apply the payment to the joint account.
- The party relieved of liability requests that you reinstate the liability.

You can create a single arrangement to cover the joint account and any individual accounts a party owns. The system splits the payments across the joint and individual debts as follows:

- If no parties on the joint account assume sole liability, each party's contribution to the joint account (from their individual arrangement) reduces the joint liability. For example, party A arranges to pay $100 per month and the system allocates $20 of that amount to the joint account. Party B arranges to pay $50 per month and the system allocates $10 of that amount to the joint account. The balance on the joint account decreases by $30.
- If a party on the joint account assumes sole liability, the other parties' arrangement covers their individual accounts only unless one of the other parties indicates otherwise. For example, party A assumes liability and arranges to pay $100 per month. The system allocates $20 of that amount to the joint account. Party B arranges to pay $50 per month and the system allocates nothing to the joint account except at the request of party B.

SIF arrangements

Custodian determines whether a customer fulfilled a Settled in Full (SIF) arrangement when the SIF arrangement doesn't use a credit card or ACH payment method. If the customer fulfilled the SIF arrangement, Custodian changes the account status to SIF and closes the account.

Related Topics

Propose a Payment Arrangement

Modify a Payment Arrangement

Override a Payment Spread

Payment Instruments

Reschedule a Payment Arrangement

Place All Scheduled Arrangements on Hold

Approve or Deny a SIF Arrangement

View Arrangement History

Payments

Account Selection

Payment Spread Selection

Settlement Selection

Payment Arrangement Types

Payment Arrangement Scenarios

Arrangement Negotiator States

Surcharge Rules

Joined Accounts Overview

Task Panels Permission

Task Panels

Feedback

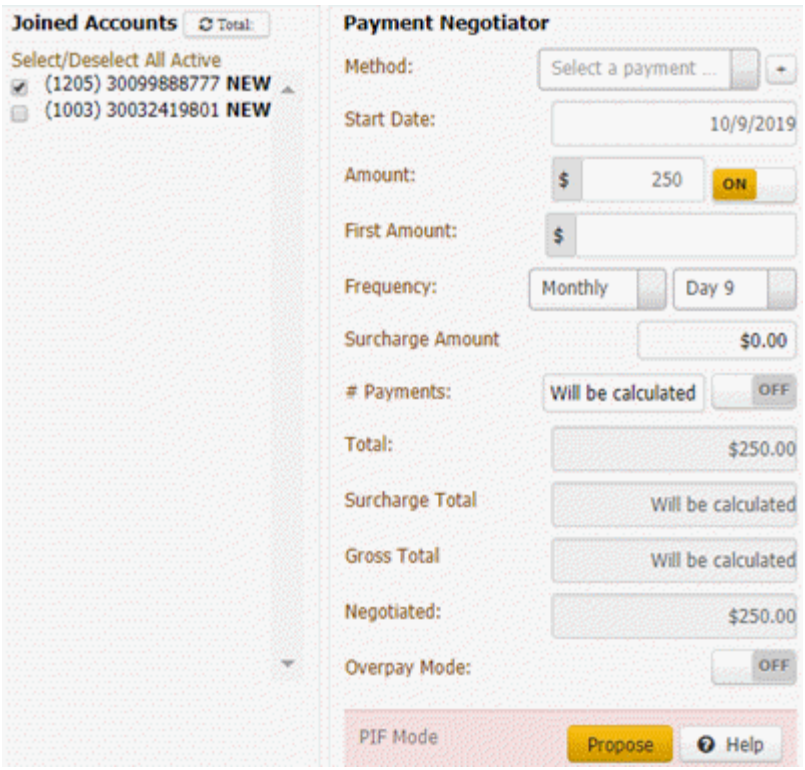
Propose a Payment Arrangement

Use the **Payment Negotiator** card in the **Arrangements** panel to propose a credit card, ACH, paper draft, or promise payment arrangement for an account. You can schedule payments for the current date or future dates only.

If your organization configured the Allow Overpayments permission to allow overpayment arrangements, you can create a single payment arrangement for an amount that exceeds the account balance but doesn't exceed the maximum overpayment amount allowed.

To propose a payment arrangement

1. In the **Task Panel** navigation tree, click **Arrangements**.



Joined Accounts card

If the account displayed currently is a joined account, the system displays the **Joined Accounts** card. If the account is not a joined account, the system hides this card. By default, the system selects the check box next to the account displayed currently and includes it first in the list. Then, the system lists all other accounts associated to the *customer* displayed currently. If there are closed accounts in the list, they appear in red.

Total: Refreshes the data in the **Joined Accounts** card.

Select/Deselect All Active: Selects or clears the check boxes next to each account.

[Include Account]: If selected, the system includes the account in the arrangement and in the total account balance.

Payment Negotiator card

Method: Method to use to process the payments. You can select an existing payment method or click the plus sign (+) to add one. If you select "Promise," specify the payment type the party promises to use to pay. The system doesn't display expired credit cards in this list box.

> **Note:** If the selected credit card expires before the arrangement ends. The system displays a message indicating that the "This credit card will expire before the arrangement ends along with the credit card expire date and arrangement end date".

Start Date: Due date for the first payment in the arrangement.

Amount: Amount of each payment. This amount defaults to a single payment for the total amount due on the account, excluding surcharges. If you set the indicator to "ON," specify the amount of each payment. If you set the indicator to "OFF," the system calculates the payment amount based on the account balance and number of payments specified, if any.

First Amount: Down payment amount. Specify an amount here when the customer wants to pay an amount on the first payment that differs from the remaining payments. For example, the customer wants to pay $300 down and $200 per month for the remaining balance.

Frequency: How often a payment is due on the account. If you select "Monthly," specify the day of the month the payment is due (for example, the fifth day of the month). If you select "Monthly Pick," specify the time of the month payment is due. For example, the first Friday of the month. If you select "Four Weekly," the frequency is one payment every four weeks. If you select "Daily," the system still skips weekends and holidays.

Surcharge Amount: Amount to include as a surcharge for each payment in the arrangement. If you have the appropriate permissions, an "ON" indicator appears. To remove the surcharge, set the indicator to "OFF." The system removes the surcharge amount. For more information about surcharges, see Surcharge Rules.

 # Payments: Number of payments in the arrangement. If you set the indicator to "ON," specify the number of payments. If you set the indicator to "OFF," the system calculates the number of payments based on the account balance and payment amount.

Total: Total scheduled amount for all the payments in the arrangement, excluding surcharges. If you set the indicator to "ON," specify the total payment amount. If you set the indicator to "OFF," the system calculates the total payment amount based on the account balance, number of payments, and interest accrual amount.

Surcharge Total: Total surcharge amount for all the payments in the arrangement. If you specify the number of payments, the system calculates and displays the surcharge amount immediately. Otherwise, the system calculates it after you propose the arrangement.

Gross Total: Total payment amount, including surcharges.

Negotiated: Total payment amount negotiated, excluding any surcharges. The system calculates this amount. This box displays when the **Is Settlement** check box is cleared.

Overpay Mode: If you set the indicator to "ON," the system allows you to create a single payment arrangement for an amount that exceeds the account balance but doesn't exceed the maximum overpayment amount allowed. If you set the indicator to "OFF," the system doesn't limit the payment arrangement to a single payment only. For more information about creating an overpayment arrangement, see Create a Payment Arrangement for an Overpayment.

Is Settlement: If selected, this payment arrangement settles the account in full, regardless of the account balance. If there is an existing scheduled payment ready to process in the **Scheduled Payments** card or your organization doesn't allow SIF arrangements, the system hides this check box. You cannot schedule a SIF arrangement until you process the scheduled payment.

Minimum: Percent of the account balance to pay. This box displays when the **Is Settlement** check box is selected. If you specify a percent, the system calculates the settlement amount. If the amount is below the minimum settlement amount allowed, the system places the arrangement on hold and displays a message indicating the settlement amount requires approval.

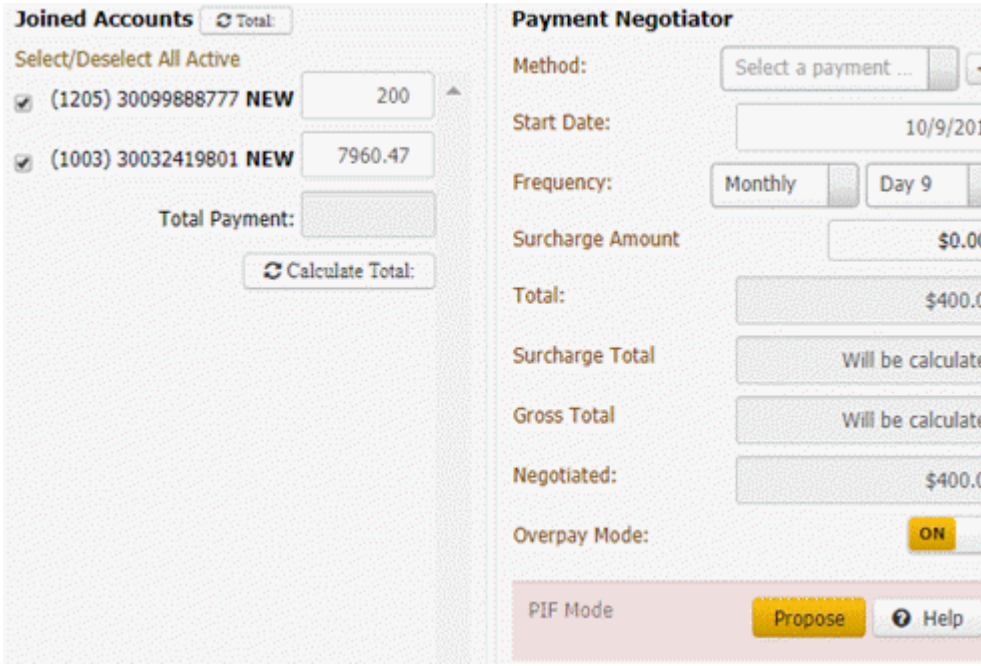
[Amount]: Amount of the account balance to pay. This box displays when the **Is Settlement** check box is selected. If you specify an amount, the system calculates the settlement percent.

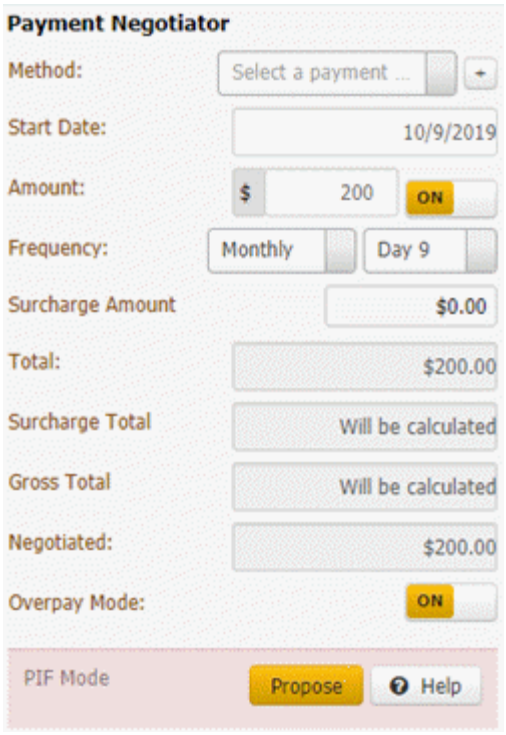
Bank Account #: Eight-digit number that identifies the bank account from which to draw a Direct Debit payment. The system displays this box when the payment method is "Direct Debit."

Bank Sort: Six-digit sort code used to validate the bank account number. The system displays this box when the payment method is "Direct Debit."

2. Do one of the following:

To create an arrangement for...	Do the following...
One or more accounts where the payment doesn't	In the **Payment Negotiator** card, complete the arrangement information and then click **Propose**.

exceed the account balance...	
One or more joined accounts where the payment exceeds the account balance...	a. In the **Payment Negotiator** card, set the **Overpay Mode** to "On."  b. In the **Joined Accounts** card, do the following: • To include a joined account in the arrangement, select the check box next to the account number. • In the **[Amount]** box for each selected account, type the payment amount to arrange for tha account. • Click **Calculate Total**. The system displays the total payment amount for all selected accounts in the **Total Payment** box. c. In the **Payment Negotiator** card, specify the arrangement method; start date; and frequency, and ther click **Propose**. If the amount in the **Total Payment** box exceeds the overpayment amount allowed, an error message displays. In the **Joined Accounts** card, change the payment amount for one or more accounts so that the total payment amount doesn't exceed the overpayment limit and then click **Propose**.
A single, non-joined account where the payment exceeds the account balance...	a. In the **Payment Negotiator** card, set the **Overpay Mode** to "On."



b. Specify the method; start date; amount; and frequency, and then click **Propose**.

If the payment amount exceeds the overpayment amount allowed, an error message displays. Change the payme amount to an amount that doesn't exceed the overpayment limit and then click **Propose**.

>>>> ORIGINAL //liquid/latitude.2021r1_systest/products/documentation/source/Liquid_Latitude_Help/Propose_a_Payment_Arrangement.htm#2

- User was not able to set account wise **settlement percentage**. If the linked accounts are of different customers, then it must display the minimum settlement percentage, which is configured in administration for that customer.

Details: For the above issue, we have provided a new pop-up screen before proposing the payment,

This pop-up displays on a click of the **'Configure Settlement'** button. This button is visible only if the multiple accounts are selected for the settlement type of arrangement.

- For **Single account** functionality is same, ita same as existing.

- For **Multiple account**, newly added button as shown

- **Configure Settlement** pop-up: newly added

It displays approval warning pop-up if total amount is less than minsif amount

For Example

Number of payments = 3

- Amount distributes based on the spread algorithm. The total of each account should match with the amount mentioned it the popup. In above example its even spread.
- Using this pop-up user can set the account wise settlement percentage. That settlement amount is used for the arrangement creation.
- Minimum settlement amount & percentage are calculated based on below

settings > User Policy=>Settlement=> % Allowed Below Minimum (subtract from

the total sttlement %)

> Client =>blanketSIF

> Minimum Settlement Options=>mode & percentage

> State Restriction Policy

==== THEIRS
//liquid/latitude.2021r1_systest/products/documentation/source/Liquid_Latitude_Help/Propose_a_Payment_Arrangement.htm#3

- User was not able to set account wise **settlement percentage**. If the linked accounts are of different customers, then it must display the minimum settlement percentage, which is configured in administration for that customer.
- Details: For the above issue, we have provided a new pop-up screen before proposing the payment, This pop-up displays on a click of the **'Configure Settlement'** button. This button is visible only if multiple accounts are selected for the settlement type of arrangement.
- For **Single account** functionality : There is no change in the Single account SIF payment processing.
- For **Multiple account**, newly added button as shown
- **Configure Settlement** pop-up: It is newly added

It displays approval warning pop-up if total amount is less than minimum SIF amount

For Example:

Number of payments = 3

- Amount among account is distributed based on the spread algorithm. The total of each account should match with the amount mentioned in the popup. In the above example its Even spread Algorithm is used.

- Using this pop-up user can set the account wise settlement percentage. That settlement amount is used for the arrangement creation.
- Minimum settlement amount & percentage are calculated based on **Admin Settings**.

settings > User Policy=>Settlement=> % Allowed Below Minimum (subtract from

the total sttlement %)

> Client =>blanketSIF

> Minimum Settlement Options=>mode & percentage

> State Restriction Policy

==== YOURS //dshettyv_liquid_latitude.2022r1_systest/products/documentation/source/Liquid_Latitude_Help/Propose_a_Payment_Arrangement.htm

The payment arrangement appears in the **Scheduled Payments** card.

<<<<

Note: If an account in the arrangement has a "closed" status, a message displays indicating that you cannot propose an arrangement on a closed account. Remove the closed account from the arrangement.

Scheduled Payments: Total scheduled payment amount, excluding surcharges.

Total Surcharges: Total surcharge amount for all the payments in the arrangement.

Hold?: Indicates whether the scheduled payment is on hold. The system doesn't process payments that are on hold.

Date: Date to process the payment.

Surcharge: Amount to include as a surcharge for the payment.

Amount: Amount of the payment, excluding surcharges.

Total: Total amount to process for the payment, including surcharges.

Method: Payment method to use (for example, credit card, ACH, paper draft, or promise).

Payer: Party on the account who arranged the payment.

Status: Status of the payment.

3. In the **Scheduled Payments** card, do the following:

    - To view details for a scheduled payment in a joined account arrangement, in the data grid, click the arrow for the row to view.

    - To add payments to the arrangement, complete the information in the **Payment Negotiator** card and then click **Propose**.

    - you can request a specific SIF /PIF/Reminder Letter that can be generated when setting up a payment arrangement. You can select a specific SIF or PIF letter, as defined by letter type when creating a payment arrangement.

        a. If a single payment is done for PIF on an account, then only the PIF letter is generated

        b. If there are multiple payments done for PIF on an account, then both PIF and Reminder letters are generated. The same functionality is provided for SIF

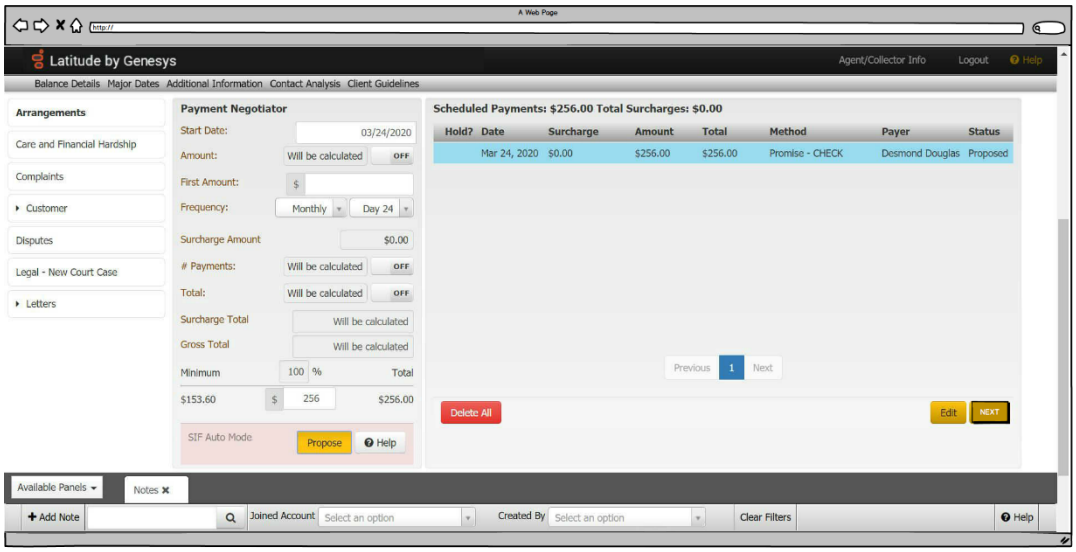
        c. If the payment is not PIF or SIF, it is generating only a Reminder letter.

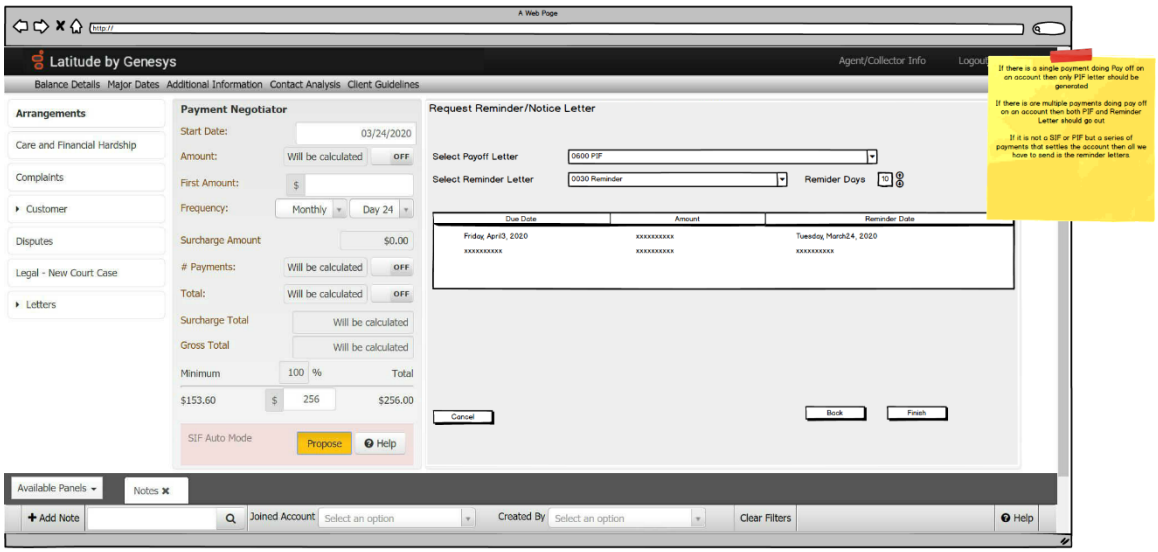
    - **NOTE:** Only promise type payments and reminder letters can generate the provided facility using which you can change the number of days prior to the due date of the payment for the Reminder Letter to be sent.

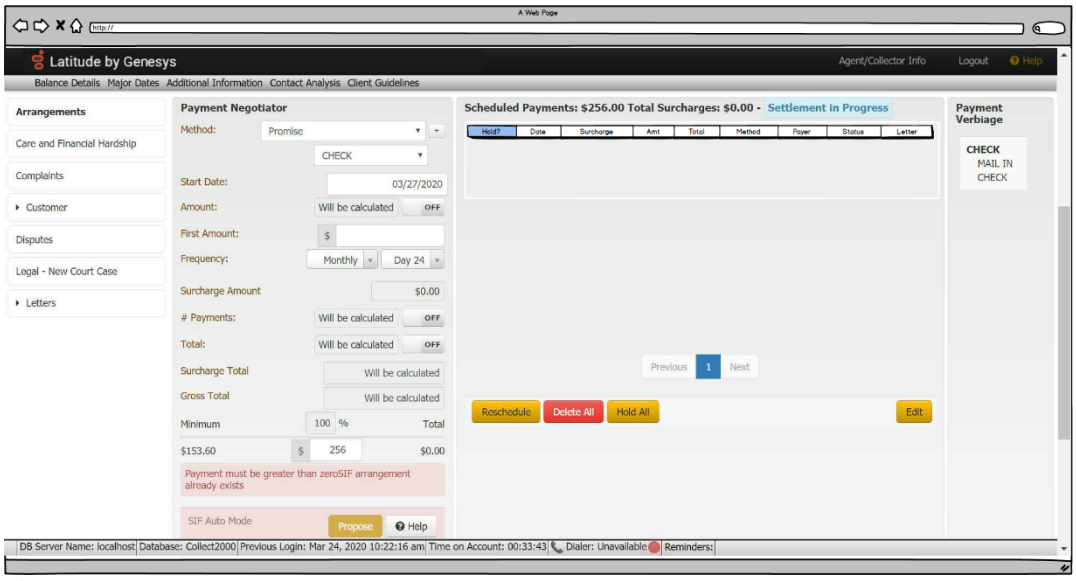
    - In the Arrangement panel, when setting up the Promise arrangement a reminder letter can be generated, and you have options to edit/modify reminder days.

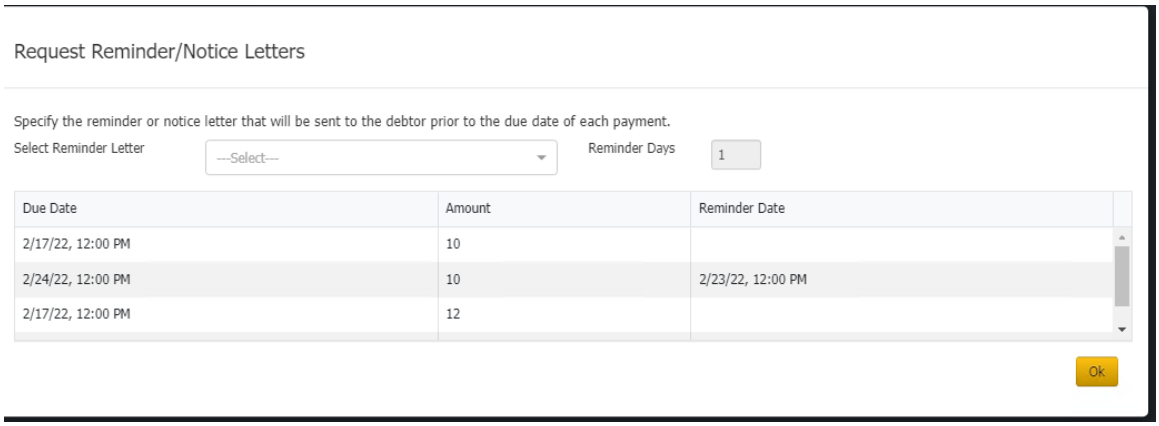
    - **Permission: Added new permission under Promises** -> **Can Change reminder days. Based on this permission you can edit reminder days**.

a. Below screenshots provided to setup for PIF letter:

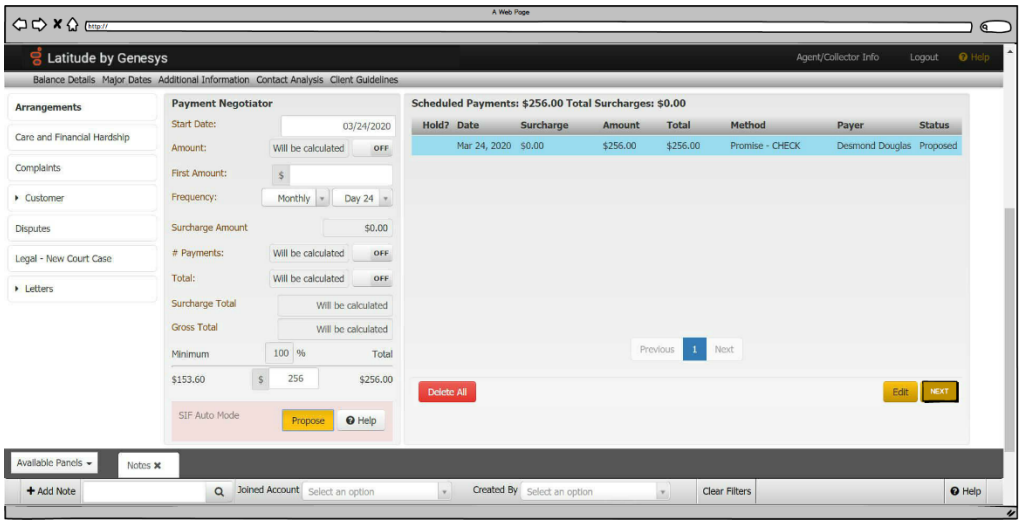

Latitude by Genesys
Agent/Collector Info
Logout
Help
Balance Details
Major Dates
Additional Information
Contact Analysis
Client Guidelines
Arrangements
Care and Financial Hardship
Complaints
Customer
Disputes
Legal - New Court Case
Letters
Payment Negotiator
Start Date: 03/24/2020
Amount: Will be calculated OFF
First Amount:
Frequency: Monthly Day 24
Surcharge Amount $0.00
Payments: Will be calculated OFF
Total: Will be calculated OFF
Surcharge Total Will be calculated
Gross Total Will be calculated
Minimum 100 % Total
$153.60 $ 256 $256.00
SIF Auto Mode
Propose
Help
Scheduled Payments: $256.00 Total Surcharges: $0.00
Hold? Date Surcharge Amount Total Method Payer Status
Mar 24, 2020 $0.00 $256.00 $256.00 Promise - CHECK Desmond Douglas Proposed
Previous 1 Next
Delete All
Edit
NEXT
Available Panels
Notes
Add Note
Joined Account Select an option
Created By Select an option
Clear Filters
Help

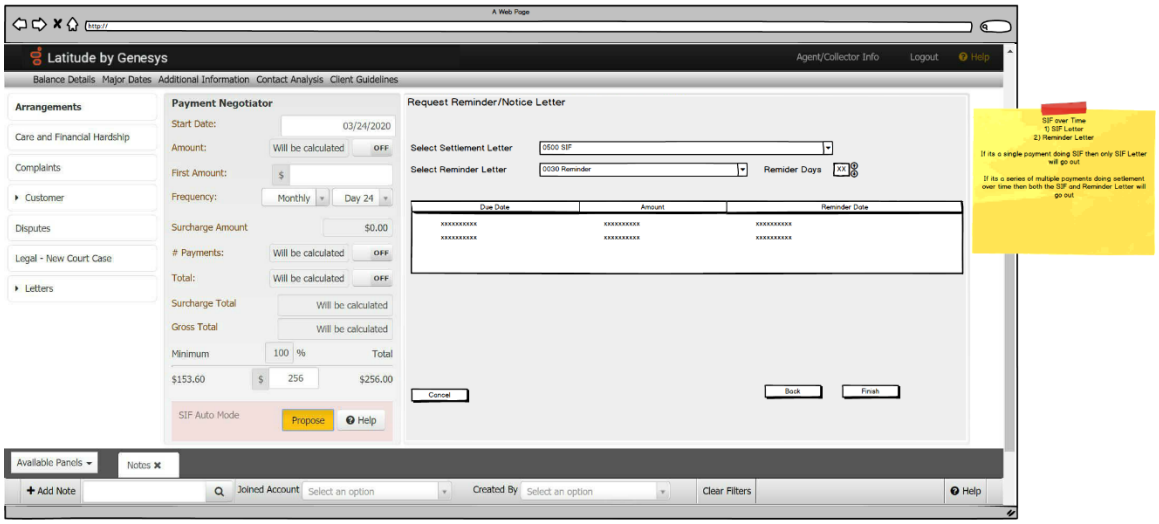

Latitude by Genesys
Agent/Collector Info
Balance Details
Major Dates
Additional Information
Contact Analysis
Client Guidelines
Arrangements
Care and Financial Hardship
Complaints
Customer
Disputes
Legal - New Court Case
Letters
Payment Negotiator
Start Date: 03/24/2020
Amount: Will be calculated OFF
First Amount:
Frequency: Monthly Day 24
Surcharge Amount $0.00
Payments: Will be calculated OFF
Total: Will be calculated OFF
Surcharge Total Will be calculated
Gross Total Will be calculated
Minimum 100 % Total
$153.60 $ 256 $256.00
SIF Auto Mode
Propose
Help
Request Reminder/Notice Letter
Select Payoff Letter 0600 PIF
Select Reminder Letter 0030 Reminder
Remider Days 10
Due Date Amount Reminder Date
Friday, April3, 2020 xxxxxxxxxx Tuesday, March24, 2020
xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx
If there is a single payment doing Pay off on an account then only PIF letter should be generated
If there is are multiple payments doing pay off on an account then both PIF and Reminder Letter should go out
If it is not a SIF or PIF but a series of payments that settles the account then all we have to send is the reminder letters
Cancel
Back
Finish
Available Panels
Notes
Add Note
Joined Account Select an option
Created By Select an option
Clear Filters
Help

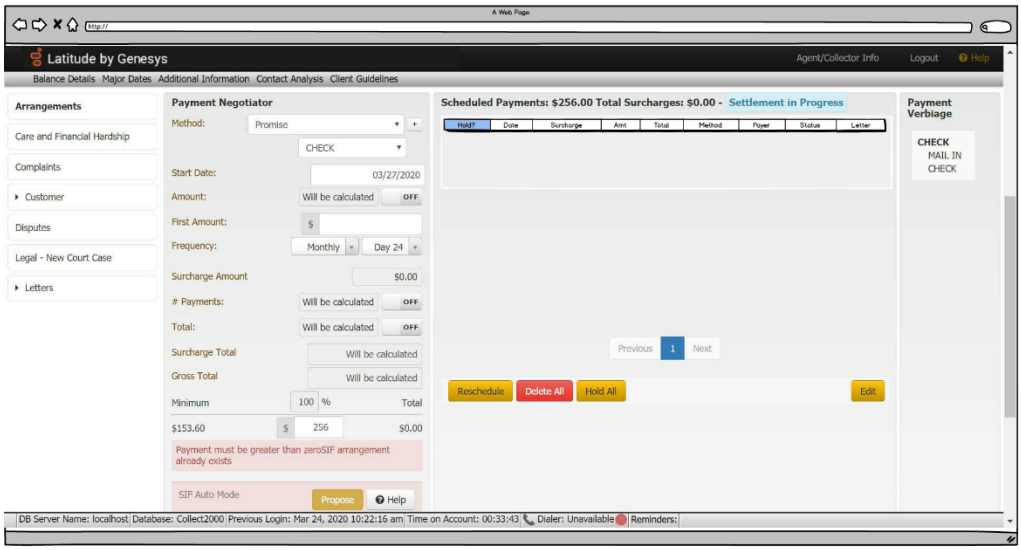

Latitude by Genesys
Agent/Collector Info
Logout
Help
Balance Details
Major Dates
Additional Information
Contact Analysis
Client Guidelines
Arrangements
Care and Financial Hardship
Complaints
Customer
Disputes
Legal - New Court Case
Letters
Payment Negotiator
Method: Promise
CHECK
Start Date: 03/27/2020
Amount: Will be calculated OFF
First Amount:
Frequency: Monthly Day 24
Surcharge Amount $0.00
Payments: Will be calculated OFF
Total: Will be calculated OFF
Surcharge Total Will be calculated
Gross Total Will be calculated
Minimum 100 % Total
$153.60 $ 256 $0.00
Payment must be greater than zeroSIF arrangement already exists
SIF Auto Mode
Propose
Help
Scheduled Payments: $256.00 Total Surcharges: $0.00 - Settlement in Progress
Hold? Date Surcharge Amt Total Method Payer Status Letter
Previous 1 Next
Reschedule
Delete All
Hold All
Edit
Payment Verbiage
CHECK
MAIL IN
CHECK
DB Server Name: localhost
Database: Collect2000
Previous Login: Mar 24, 2020 10:22:16 am
Time on Account: 00:33:43
Dialer: Unavailable
Reminders:

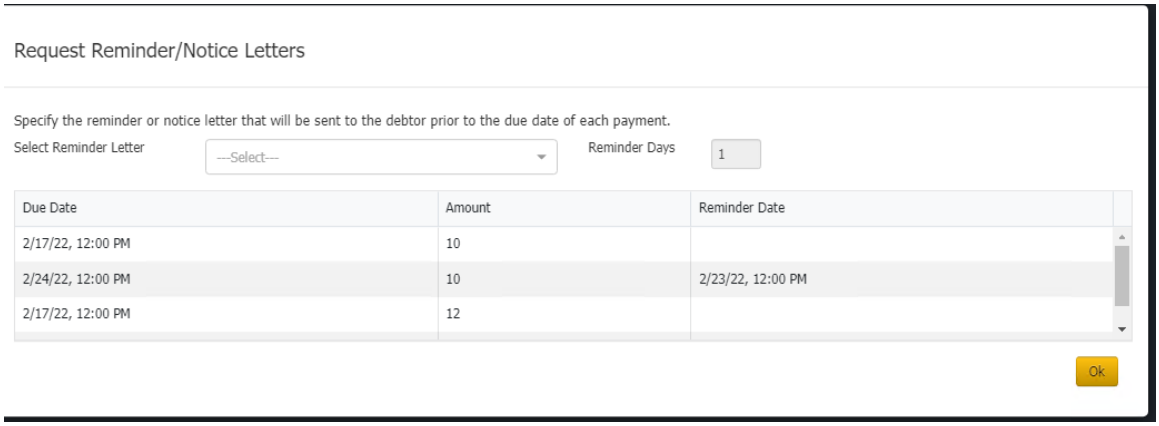


b. Below screenshots provided to setup for SIF review letter :


Latitude by Genesys
Agent/Collector Info
Logout
Help
Balance Details
Major Dates
Additional Information
Contact Analysis
Client Guidelines
Arrangements
Care and Financial Hardship
Complaints
Customer
Disputes
Legal - New Court Case
Letters
Payment Negotiator
Start Date:
03/24/2020
Amount:
Will be calculated
First Amount:
Frequency:
Monthly
Day 24
Surcharge Amount
$0.00
Payments:
Total:
Surcharge Total
Gross Total
Minimum
100
%
Total
$153.60
256
$256.00
SIF Auto Mode
Propose
Help
Scheduled Payments: $256.00 Total Surcharges: $0.00
Hold?
Date
Surcharge
Amount
Total
Method
Payer
Status
Mar 24, 2020
$0.00
$256.00
$256.00
Promise - CHECK
Desmond Douglas
Proposed
Previous
1
Next
Delete All
Edit
NEXT
Available Panels
Notes
Add Note
Joined Account
Select an option
Created By
Clear Filters


Latitude by Genesys
Agent/Collector Info
Logout
Help
Balance Details
Major Dates
Additional Information
Contact Analysis
Client Guidelines
Arrangements
Care and Financial Hardship
Complaints
Customer
Disputes
Legal - New Court Case
Letters
Payment Negotiator
Start Date:
03/24/2020
Amount:
Will be calculated
First Amount:
Frequency:
Monthly
Day 24
Surcharge Amount
$0.00
Payments:
Total:
Surcharge Total
Gross Total
Minimum
100
%
Total
$153.60
256
$256.00
SIF Auto Mode
Propose
Help
Request Reminder/Notice Letter
Select Settlement Letter
0600 SIF
Select Reminder Letter
0030 Reminder
Remider Days
XX
Due Date
Amount
Reminder Date
Cancel
Back
Finish
SIF over Time
1) SIF Letter
2) Reminder Letter
If its a single payment doing SIF then only SIF Letter will go out
If its a series of multiple payments doing settlement over time then both the SIF and Reminder Letter will go out
Available Panels
Notes
Add Note
Joined Account
Select an option
Created By
Clear Filters


Latitude by Genesys
Agent/Collector Info
Logout
Help
Balance Details
Major Dates
Additional Information
Contact Analysis
Client Guidelines
Arrangements
Care and Financial Hardship
Complaints
Customer
Disputes
Legal - New Court Case
Letters
Payment Negotiator
Method:
Promise
CHECK
Start Date:
03/27/2020
Amount:
Will be calculated
First Amount:
Frequency:
Monthly
Day 24
Surcharge Amount
$0.00
Payments:
Total:
Surcharge Total
Gross Total
Minimum
100
%
Total
$153.60
256
$0.00
Payment must be greater than zeroSIF arrangement already exists
SIF Auto Mode
Propose
Help
Scheduled Payments: $256.00 Total Surcharges: $0.00 - Settlement in Progress
Hold?
Date
Surcharge
Amt
Total
Method
Payer
Status
Letter
Previous
1
Next
Reschedule
Delete All
Hold All
Edit
Payment Verbiage
CHECK
MAIL IN CHECK
DB Server Name: localhost
Database: Collect2000
Previous Login: Mar 24, 2020 10:22:16 am
Time on Account: 00:33:43
Dialer: Unavailable
Reminders:



- To save the proposed arrangement, click **Save**. If the payment arrangement has a status of "proposed," the system changes it to "scheduled." If the account has at least one SIF arrangement, "Settlement in Progress" appears next to the "Scheduled Payments" heading.
- To delete all the payments in the arrangement, click **Delete All**, and in the confirmation dialog box, click **Yes**.

Related Topics

Payment Instruments

Account Selection

Payment Spread Selection

Settlement Selection

Payment Arrangement Types

Payment Arrangement Scenarios

Arrangement Negotiator States

Surcharge Rules

Arrangements

Payment Methods

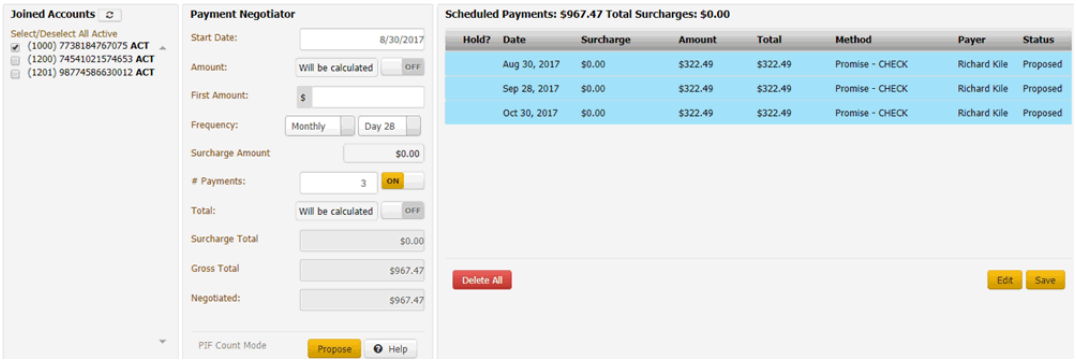
Feedback

Modify a Payment Arrangement

Use the **Scheduled Payments** card in the **Arrangements** panel to modify a proposed or scheduled payment arrangement for an account.

To modify a payment arrangement

1. In the **Task Panel** navigation tree, click **Arrangements**.



Joined Accounts card

If the account displayed currently is a joined account, the system displays the **Joined Accounts** card. If the account is not a joined account, the system hides this card. By default, the system selects the check box next to the account displayed currently and includes it first in the list. Then, the system lists all other accounts associated to the *customer* displayed currently. If there are closed accounts in the list, they appear in red.

Total: Refreshes the data in the **Joined Accounts** card.

Select/Deselect All Active: Selects or clears the check boxes next to each account.

[Include Account]: If selected, the system includes the account in the arrangement and in the total account balance.

Payment Negotiator card

Start Date: Due date for the first payment in the arrangement.

Amount: Amount of each payment. This amount defaults to a single payment for the total amount due on the account, excluding surcharges. If you set the indicator to "ON," specify the amount of each payment. If you set the indicator to "OFF," the system calculates the payment amount based on the account balance and number of payments.

First Amount: Down payment amount. Specify an amount here when the customer wants to pay an amount on the first payment that differs from the remaining payments. For example, the customer wants to pay $300 down and $200 per month for the remaining balance.

Frequency: How often a payment is due on the account. If you select "Monthly," specify the day of the month the payment is due (for example, the fifth day of the month). If you select "Monthly Pick," specify the time of the month payment is due. For example, the first Friday of the month. If you select "Four Weekly," the frequency is one payment every four weeks. If you select "Daily," the system still skips weekends and holidays.

Surcharge Amount: Amount to include as a surcharge for each payment in the arrangement. If you have the appropriate permissions, an "ON" indicator appears. To remove the surcharge, set the indicator to "OFF." The system removes the surcharge amount. For more information about surcharges, see Surcharge Rules.

Note: If you change the surcharge amount at the payment method or client fee level after creating an arrangement, the system doesn't reflect the change here unless you change the payment method.

 # Payments: Number of payments in the arrangement. If you set the indicator to "ON," specify the number of payments. If you set the indicator to "OFF," the system calculates the number of payments based on the account balance and payment amount.

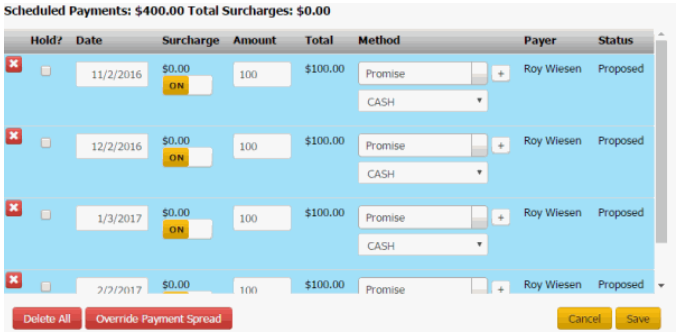
Total: Total scheduled amount for all the payments in the arrangement, excluding surcharges. If you set the indicator to "ON," specify the total payment amount. If you set the indicator to "OFF," the system calculates the total payment amount based on the account balance, number of payments, and interest accrual amount.

Note: You cannot change the payment method in the **Payment Negotiator** until you save the proposed arrangement.

2. To add payments to the arrangement, complete the information in the **Payment Negotiator** card and then click **Propose**. The payments appear in the **Scheduled Payments** card.

Note: If an account in the arrangement has a "closed" status, a message displays indicating that you cannot propose an arrangement on a closed account. Remove the closed account from the arrangement.

3. To modify a payment, in the **Scheduled Payments** card, click **Edit** and then modify the following information as necessary.



Delete icon: Click to delete the payment.

Hold?: If selected, the system places the payment on hold and doesn't process it when the due date arrives.

Date: Date to process the payment.

Surcharge: Amount to include as a surcharge for the payment. To modify the surcharge amount, delete the arrangement and recreate it.

Amount: Payment amount, excluding surcharges.

Total: Total amount to process, including surcharges.

Method: Payment method to use to process the payment (for example, credit card, ACH, paper draft, or promise). You can select an existing payment method or click the plus sign (+) to add one.

Payer: Party on the account who arranged the payment.

Status: Status of the payment. The system populates the status.

Pre Post: The system processed the payment with the vendor but hasn't posted it to the account. You cannot modify pre-post payments.

Proposed: Payment is part of a proposed payment arrangement.

Scheduled: Payment is scheduled for processing.

5. When finished modifying the arrangement, click **Save**. If the payment arrangement has a status of "proposed," the system changes it to "scheduled." If the account has at least one SIF arrangement, "Settlement in Progress" appears next to the "Scheduled Payments" heading.

Tip: To delete all the payments in the arrangement, click **Delete All**, and in the confirmation dialog box, click **Yes**.

Related Topics

Payment Instruments

Account Selection

Payment Spread Selection

Settlement Selection

Payment Arrangement Types

Payment Arrangement Scenarios

Arrangement Negotiator States

Arrangements

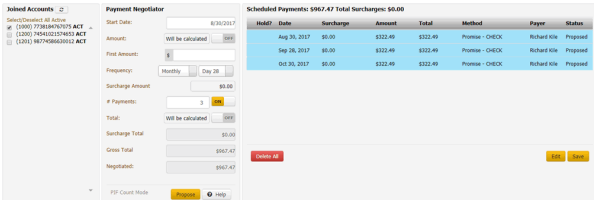
Feedback

Override a Payment Spread

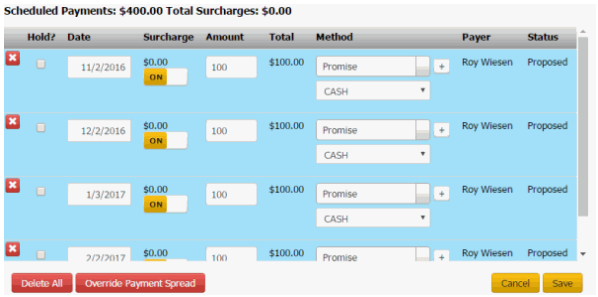
Use the **Override Payment Spread** dialog box to override the configured payment spread and specify the order in which to spread payments across the linked accounts in the arrangement. This option is not available for non-linked accounts. All clients in the arrangement must have the Override Payment Spread permission.

To override a payment spread

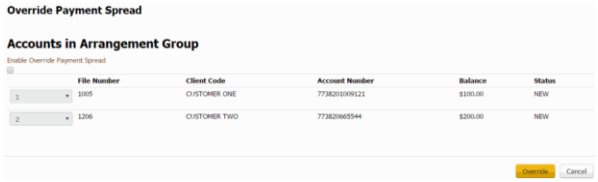
1. In the **Task Panel** navigation tree, click **Arrangements**.



2. In the **Scheduled Payments** card, click **Edit**.



3. Click **Override Payment Spread**. The **Override Payment Spread** dialog box appears.



Enable Override Payment Spread: If selected, the system allows you to specify the payment spread order.

[Payment Spread Order]: Order in which to spread payments across the accounts. The system applies the payment to the account with a payment spread order of one (1) first and continues in sequential order until no payment amount remains to apply.

File Number: Unique code that the system assigned to identify the account.

Client Code: Unique code that your organization assigned to identify the client.

Account Number: Code that the client assigned to identify the account.

Balance: Current amount due on the account.

Status: Unique code that identifies the account status.

4. Click **Override**. The **Override Payment Spread** dialog box closes.

5. In the **Scheduled Payments** card, click **Save**. The system saves the override settings you specified and displays "Custom Spread Override Enabled" in the Payer column of the **Scheduled Payments** card. (Click the arrow next to the Hold? column to see the message.) If the payment arrangement has a status of "proposed," the system changes it to "scheduled." If the account has at least one SIF arrangement, "Settlement in Progress" appears next to the "Scheduled Payments" heading.

Related Topics

Payment Instruments

Account Selection

Payment Spread Selection

Settlement Selection

Payment Arrangement Types

Payment Arrangement Scenarios

Arrangement Negotiator States

Arrangements

Payment Instruments

Feedback

Payment Instruments

You can add and select credit card and ACH payment instruments when scheduling payment arrangements. To reuse a payment instrument, save it to the customer's wallet.

Related Topics

Add a Credit Card

Add an ACH or Paper Draft Account

Add a Direct Debit Account

Search for a Credit Card

Search for an ACH or Paper Draft Account

Delete a Wallet Item

Arrangements

Feedback

Add a Credit Card

Use the **Card** tab in the **Payment Instrument** dialog box to add a credit card to the **Method** list box. You must have the Credit Cards Permission.

Important!
If you are taking the credit card information over the phone and Latitude is recording the call, Latitude automatically pauses the recording while the **Payment Instrument** dialog box is open. When you close the dialog box, Latitude resumes recording.

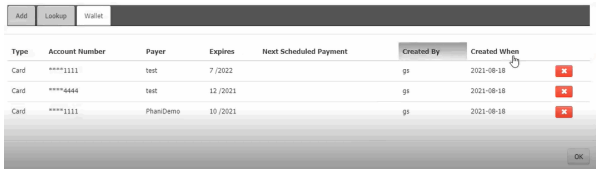
To add a credit card

1. In the **Task Panel** navigation tree, do one of the following:

    - Click **Payments**.

- Click **Arrangements**.

2. Click the plus sign (**+**) next to the **Method** list box. The **Payment Instrument** dialog box appears.



Type: Card type

Account Number: Card Account number

Payer: Party on the account who arranged the payment.

Expires: Card expiry date

Next Scheduled Payment: Next payment date

Created By: Name of the creator

Created When: Date when it is created

2. Click the **Add** tab and then click **Card**.

> **Note:** All the fields displayed are based on the selection made in the Credit Cards Permission.

Card #: Credit card number.

Name: Name as it appears on the credit card.

Expiration: Credit card expiration month and year.

Security Code: Three-digit security code that appears on the back of the credit card.

Use Current Address as Billing Address: If selected, the system takes the existing address available in the customers contact information.

> **Note:** If the address information is not available in the customer contact Information. The system displays a message indicating that the current address is not available.

Address: Person's street address, city, state, and postal code. For more information, see Contact Information.

Save to Wallet: If selected, the system saves the credit card information to the customer's wallet using the following naming convention: "[Name on credit card]-CC-[last four digits of the credit card account number]." For example, "John Smith-CC-1111." The system tokenizes the credit card information. When taking a payment in the future, you can select this credit card and the system uses Payment Vendor Gateway to retrieve the token.

Replace Existing?: If selected and a payment instrument already exists, the system replaces the payment instruments in the current arrangement with the payment instrument that you select. If a payment instrument doesn't exist already, the system doesn't display this check box.

Remove Existing?: If selected and the existing payment instrument is not used in a future arrangement, the system removes the payment instrument. If a payment instrument doesn't exist already, the system doesn't display this check box.

4. Complete the information and then click **OK**. The credit card is available for selection in the **Method** list box.

Note: If the credit card does not match an existing credit card type (for example, Visa), an error message appears. For more information about maintaining credit card types, see *Credit Card Types*.

Related Topics

Payment Instruments

Arrangements

Credit Cards Permission

Credit Card Types

Feedback

Add an ACH or Paper Draft Account

Use the **ACH** or **Paper Draft** tab in the **Payment Instrument** dialog box to add an Automated Clearing House (ACH) or paper draft account to the **Method** list box.

Important!
If you are taking the ACH or paper draft information over the phone and Latitude is recording the call, Latitude automatically pauses the recording while the **Payment Instrument** dialog box is open. When you close the dialog box, Latitude resumes recording.

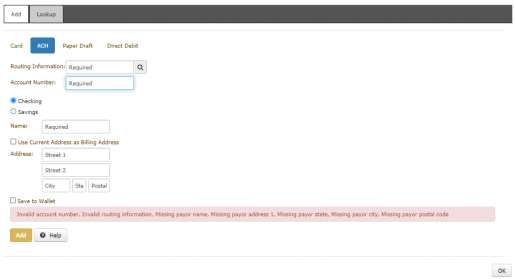
To add an ACH or paper draft account

1. In the **Task Panel** navigation tree, do one of the following:

    - Click **Payments**.
    - Click **Arrangements**.

2. Click the plus sign (**+**) next to the **Method** list box. The **Payment Instrument** dialog box appears.

3. Click the **Add** tab and then click **ACH** or **Paper Draft**.



Routing Information: Bank routing number.

Account Number: Checking or savings account number.

Checking: If selected, the account is a checking account.

Savings: If selected, the account is a savings account.

Name: Name on the checking or savings account.

Use Current Address as Billing Address: If selected, use the customer's address that is on file as the billing address.

Address: If the **Use Current Address as Billing Address** check box is cleared, the address boxes are available. Type the street address, city, state, and postal code associated to the account.

Save to Wallet: If selected, the system saves the information to the customer's wallet using the following naming convention: "Type-[last four digits of the account number]." For example, "ACH-4545" or "PD-4545." The system tokenizes the account information. When taking a payment in the future, you can select this account and the system uses Payment Vendor Gateway to retrieve the token.

Replace Existing?: If selected and a payment instrument already exists, the system replaces the payment instruments in the current arrangement with the payment instrument that you select. If a payment instrument doesn't exist already, the system doesn't display this check box.

Remove Existing?: If selected and the existing payment instrument is not used in a future arrangement, the system removes the payment instrument. If a payment instrument doesn't exist already, the system doesn't display this check box.

If selected, the system deletes the account that you specify. This check box appears when one or more accounts of this type exist.

4. To search for a routing number, do the steps to Search for an ABA Routing Number.

5. Complete the information and then click **OK**. The ACH or paper draft account is available for selection in the **Method** list box.

Related Topics

Payment Instruments

Arrangements

ABA Routing Numbers

Feedback

Add a Direct Debit Account

Use the **Direct Debit** tab in the **Payment Instrument** dialog box to add a Direct Debit account to the **Method** list box for one-time use only. You cannot save the account to the wallet. You must have the Direct Debit Permission.

Important!
If you are taking the Direct Debit account information over the phone and Latitude is recording the call, Latitude automatically pauses the recording while the **Payment Instrument** dialog box is open. When you close the dialog box, Latitude resumes recording.

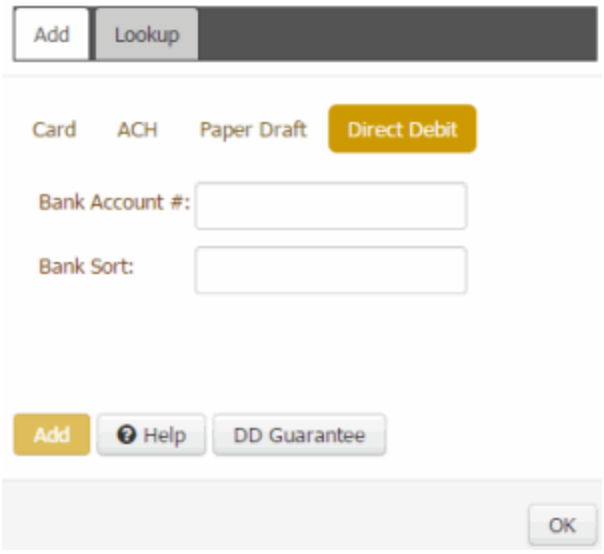
To add a Direct Debit account

1. In the **Task Panel** navigation tree, do one of the following:

   - Click **Payments**.
   - Click **Arrangements**.

2. Click the plus sign (**+**) next to the **Method** list box. The **Payment Instrument** dialog box appears.

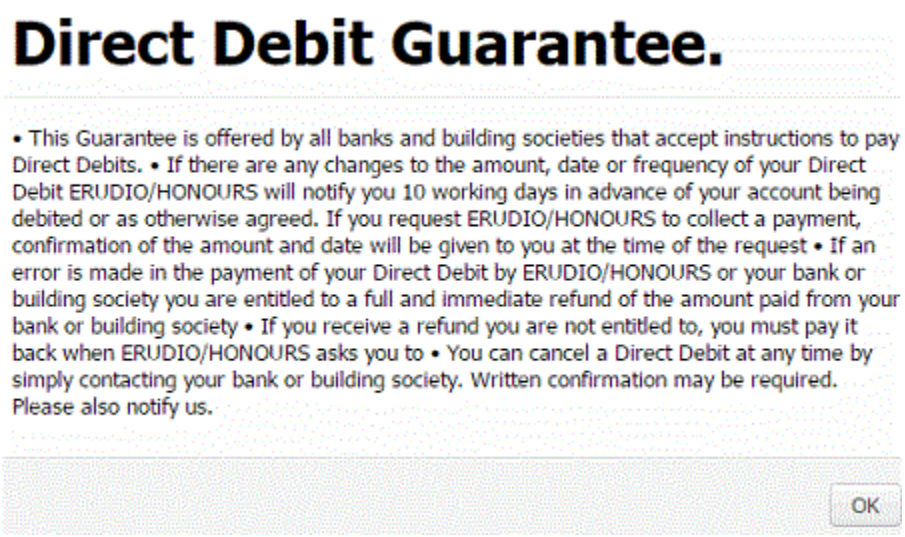
3. Click the **Add** tab and then click **Direct Debit**.



Bank Account #: Eight-digit number that identifies the bank account from which to draw Direct Debit payments.

Bank Sort: Six-digit sort code used to validate the bank account number.

4. To view the Direct Debit guarantee for the account, click **DD Guarantee**.



5. When finished, click **OK**.
6. Complete the information to add the Direct Debit and then click **OK**. The Direct Debit account is available for selection in the **Method** list box.

Related Topics

Payment Instruments

Arrangements

Direct Debit Permission

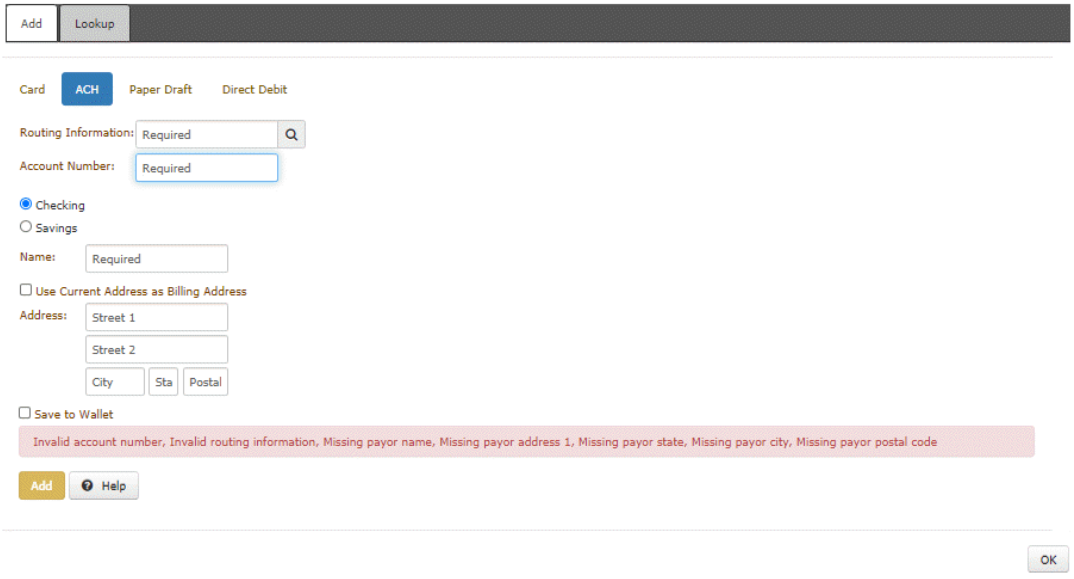
Feedback

Search for an ABA Routing Number

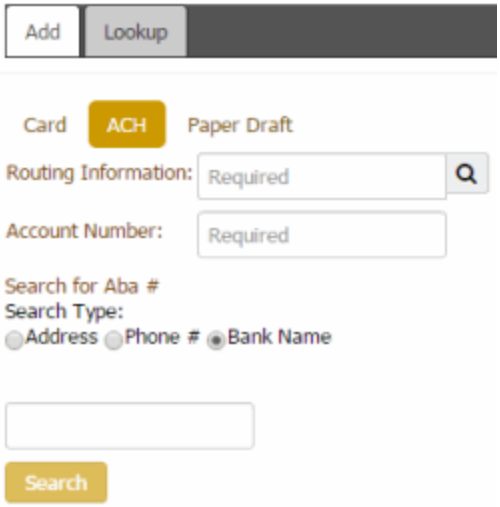
Use the **Add** tab in the **Payment Instrument** dialog box to search for a financial institution's American Bankers Association (ABA) routing number for a checking or savings account.

To search for an ABA routing number

1. In the **Task Panel** navigation tree, do one of the following:
    - Click **Payments**.
    - Click **Arrangements**.
2. Click the Search icon next to the **Method** list box. The **Payment Instrument** dialog box appears.
3. Click the **Add** tab and then click **ACH** or **Paper Draft**.



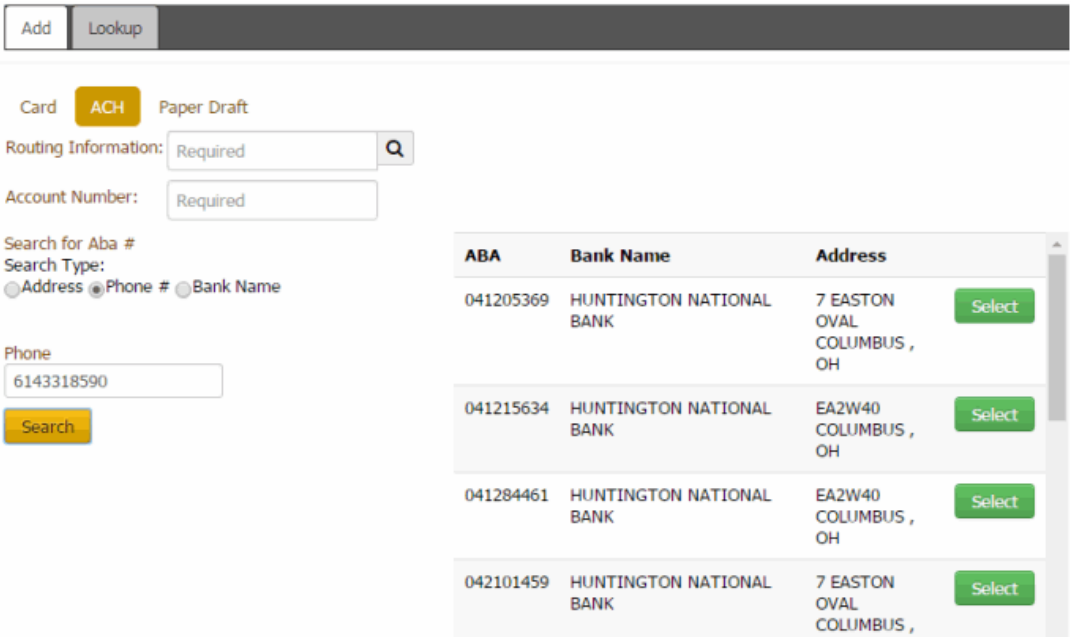
4. Click the Search icon next to **Routing Information**. The search options appear.



5. Do one of the following:

   - To search by address. click **Address** and then type the address criteria.
   - To search by phone number, click **Phone #** and then type the full or partial phone number.
   - To search by bank name, click **Bank name** and then specify the full or partial name of the financial institution.

6. Click **Search**. The search results appear.



7. Scroll to locate the financial institution and then click **Select**. The system populates the **Routing Information** box.

8. Continue the steps to Add an ACH or Paper Draft Account.

Related Topics

Payment Instruments

Arrangements

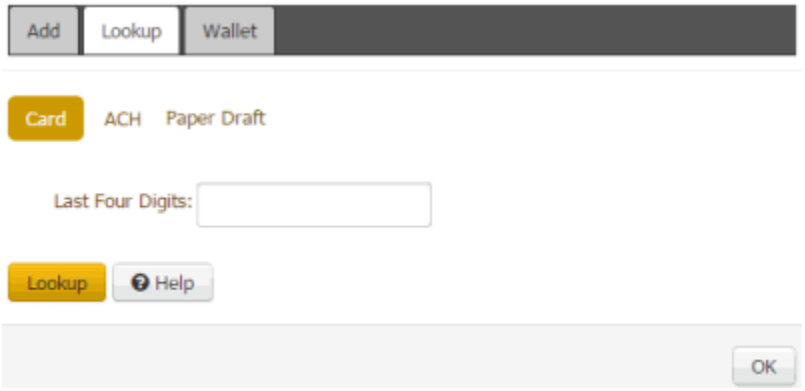
Feedback

Search for a Credit Card

Use the **Lookup** tab in the **Payment Instrument** dialog box to search for a credit card and add it to the **Method** list box.

To search for a credit card

1. In the **Task Panel** navigation tree, do one of the following:
    - Click **Payments**.
    - Click **Arrangements**.
2. Click the Search icon next to the **Method** list box. The **Payment Instrument** dialog box appears.
3. Click the **Lookup** tab and then click **Card**.



4. In the **Last Four Digits** box, type the last four digits of the credit card number and then click **Lookup**. The system displays the credit card in the **Method** list box.

Related Topics
Payment Instruments

Arrangements

Feedback

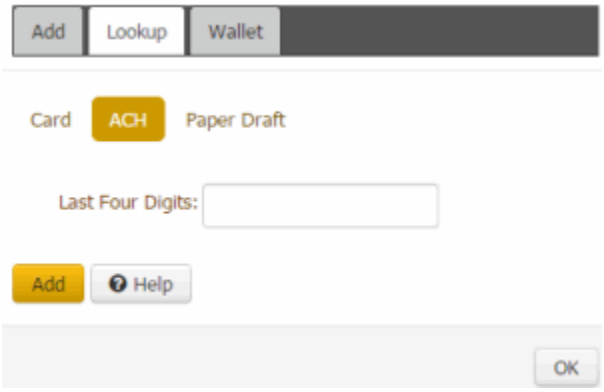
Search for an ACH or Paper Draft Account

Use the **Lookup** tab in the **Payment Instrument** dialog box to search for an Automated Clearing House (ACH) or paper draft account and add it to the **Method** list box.

To search for an ACH or paper draft account

1. In the **Task Panel** navigation tree, do one of the following:
    - Click **Payments**.
    - Click **Arrangements**.

2. Click the Search icon next to the **Method** list box. The **Payment Instrument** dialog box appears.
3. Click the **Lookup** tab and then click **ACH** or **Paper Draft**.



4. In the **Last Four Digits** box, type the last four digits of the account number and then click **Lookup**. The system displays the account in the **Method** list box.

Related Topics

Payment Instruments

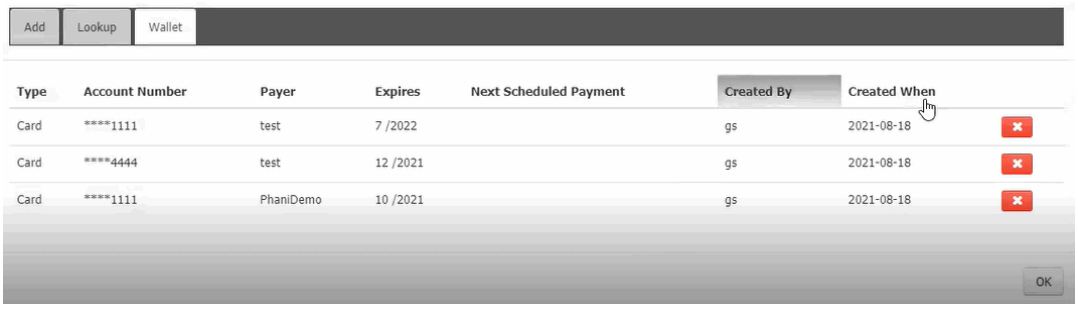
Arrangements

Wallet Items

Use the **Wallet** tab in the **Payment Instrument** dialog box to prevent adding expired credit card details, setup payments past the expiry date of credit card and many more.

To prevent adding expired Credit Card details

1. In the **Task Panel** navigation tree, do one of the following:
   - Click **Payments**.
   - Click **Arrangements**.
2. Click the Wallet icon next to the **Method** list box. The **Payment Instrument** dialog box appears.



Type: Card type

Account Number: Card Account number

Payer: Party on the account who arranged the payment.

Expires: Card expiry date

Next Scheduled Payment: Next payment date

Created By: Name of the creator

Created When: Date when it is created

4. Click **Add** tab.

4. In the confirmation dialog box, click **Yes**.

Related Topics

Payment Instruments

Arrangements

Delete a Wallet Item

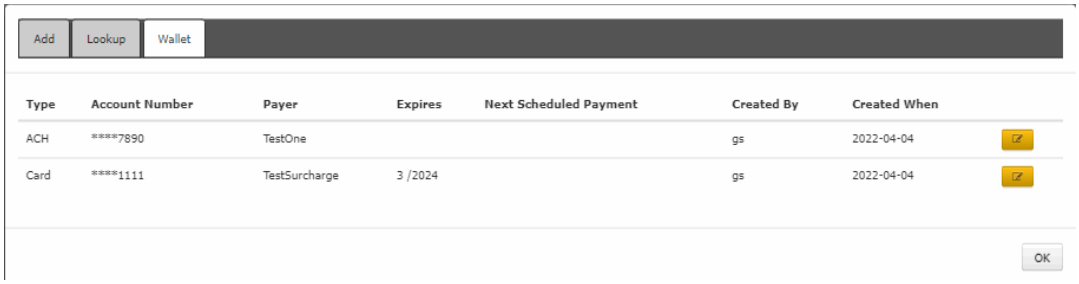
Edit a Wallet Item

Edit a Wallet Item

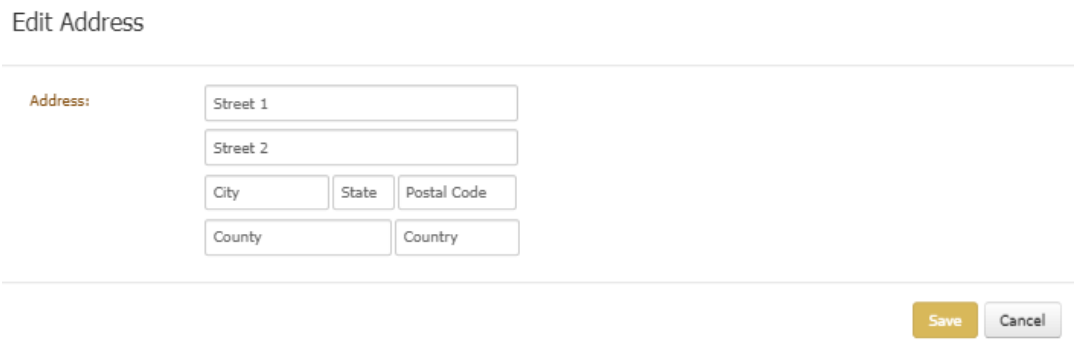
Use the **Wallet** tab in the **Payment Instrument** dialog box to edit a credit card, ACH, or paper draft account from the customer's wallet.

To Edit a wallet item

1. In the **Task Panel** navigation tree, do one of the following:
   - Click **Payments**.
   - Click **Arrangements**.
2. Click the Wallet icon next to the **Method** list box. The **Payment Instrument** dialog box appears.
3. Click the **Wallet** tab.



4. Click the next to the wallet item. The **Edit Address** dialog box appears.



4. In the **Edit Address** dialog box, click to edit the street, city, state, postal code, county, and country details.
5. Click **Save**.

Related Topics

Payment Instruments

Arrangements

Wallet Items

Delete a Wallet Item

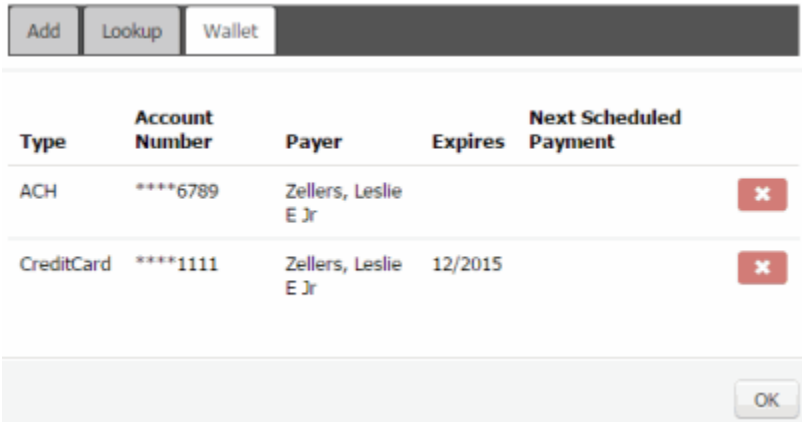
Feedback

Delete a Wallet Item

Use the **Wallet** tab in the **Payment Instrument** dialog box to delete a credit card, ACH, or paper draft account from the customer's wallet.

To delete a wallet item

1. In the **Task Panel** navigation tree, do one of the following:
   - Click **Payments**.
   - Click **Arrangements**.
2. Click the Wallet icon next to the **Method** list box. The **Payment Instrument** dialog box appears.
3. Click the **Wallet** tab.



4. Click the **X** next to the wallet item and then click **OK**.
5. In the confirmation dialog box, click **Yes**.

Related Topics

Payment Instruments

Arrangements

Wallet Items

Edit a Wallet Item

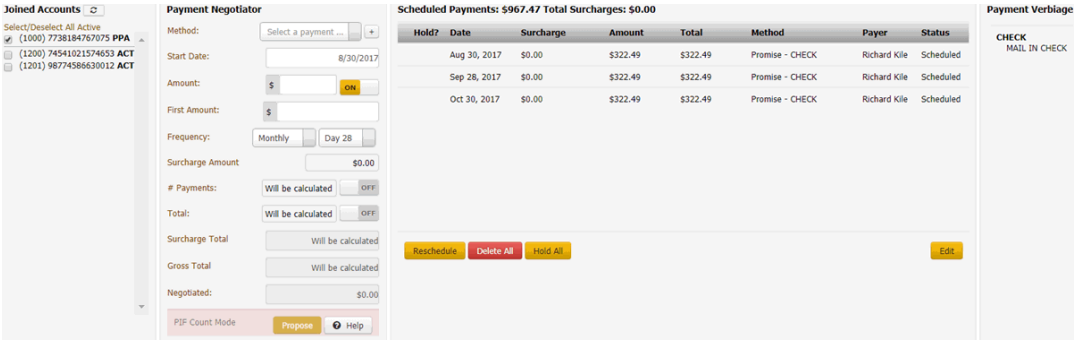
Feedback

Reschedule a Payment Arrangement

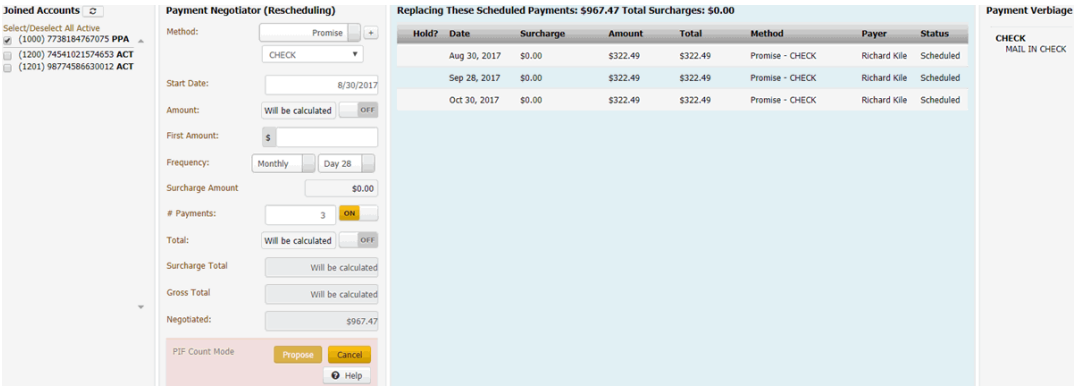
Use the **Scheduled Payments** card in the **Arrangements** panel to reschedule a payment arrangement.

To reschedule a payment arrangement

1. In the **Task Panel** navigation tree, click **Arrangements**.



2. Click **Reschedule**. The system displays the Payment Negotiator in rescheduling mode.



Joined Accounts card

If the account displayed currently is a joined account, the system displays the **Joined Accounts** card. If the account is not a joined account, the system hides this card. By default, the system selects the check box next to the account displayed currently and includes it first in the list. Then, the system lists all other accounts associated to the *customer* displayed currently. If there are closed accounts in the list, they appear in red.

Total: Refreshes the data in the **Joined Accounts** card.

Select/Deselect All Active: Selects or clears the check boxes next to each account.

[Include Account]: If selected, the system includes the account in the arrangement and in the total account balance.

Payment Negotiator card

Method: Method to use to process the payments. You can select an existing payment method or click the plus sign (+) to add one. If you select "Promise," specify the payment type the party promises to use to pay. The system doesn't display expired credit cards in this list box.

Start Date: Due date for the first payment in the arrangement.

Amount: Amount of each payment. This amount defaults to a single payment for the total amount due on the account, excluding surcharges. If you set the indicator to "ON," specify the amount of each payment. If you set the indicator to "OFF," the system calculates the payment amount based on the account balance and number of payments.

First Amount: Down payment amount. Specify an amount here when the customer wants to pay an amount on the first payment that differs from the remaining payments. For example, the customer wants to pay $300 down and $200 per month for the remaining balance.

Frequency: How often a payment is due on the account. If you select "Monthly," specify the day of the month the payment is due (for example, the fifth day of the month). If you select "Monthly Pick," specify the time of the month payment is due. For example, the first Friday of the month. If you select "Four Weekly," the frequency is one payment every four weeks. If you select "Daily," the system still skips weekends and holidays.

Surcharge Amount: Amount to include as a surcharge for each payment in the arrangement. If you have the appropriate permissions, an "ON" indicator appears. To remove the surcharge, set the indicator to "OFF." The system removes the surcharge amount. For more information about surcharges, see Surcharge Rules.

 # Payments: Number of payments in the arrangement. If you set the indicator to "ON," specify the number of payments. If you set the indicator to "OFF," the system calculates the number of payments based on the account balance and payment amount.

Total: Total scheduled amount for all the payments in the arrangement, excluding surcharges. If you set the indicator to "ON," specify the total payment amount. If you set the indicator to "OFF," the system calculates the total payment amount based on the account balance, number of payments, and interest accrual amount.

Is Settlement: If selected, this payment arrangement settles the account in full, regardless of the account balance. If there is an existing scheduled payment ready to process in the **Scheduled Payments** card or your organization doesn't allow SIF arrangements, the system hides this check box. You cannot schedule a SIF arrangement until you process the scheduled payment.

Minimum: Percent of the account balance to pay. This box displays when the **Is Settlement** check box is selected. If you specify a percent, the system calculates the settlement amount. If the amount is below the minimum settlement amount allowed, the system places the arrangement on hold and displays a message indicating the settlement amount requires approval.

[Amount]: Amount of the account balance to pay. This box displays when the **Is Settlement** check box is selected. If you specify an amount, the system calculates the settlement percent.

3. Modify the information and then click **Propose**. The rescheduled payment arrangement appears in the **Scheduled Payments** card with a "proposed" status.

Note: If an account in the arrangement has a "closed" status, a message displays indicating that you cannot propose an arrangement on a closed account. Remove the closed account from the arrangement.

4. To save the arrangement, click **Save**. If the payment arrangement has a status of "proposed," the system changes it to "scheduled." If the account has at least one SIF arrangement, "Settlement in Progress" appears next to the "Scheduled Payments" heading.

Related Topics

Arrangements

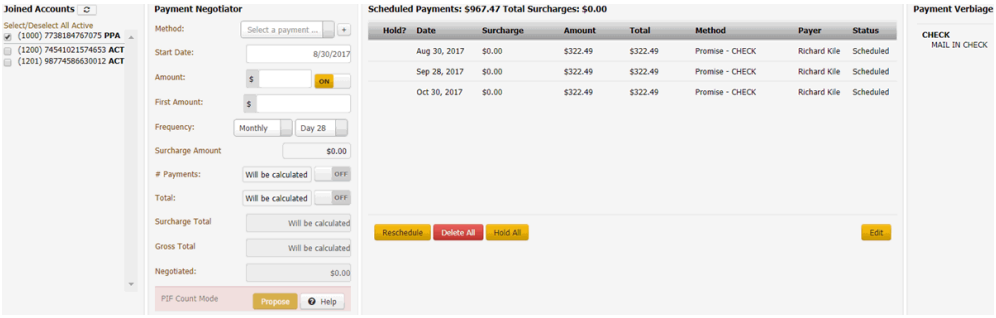
Feedback

Place All Scheduled Arrangements on Hold

Use the **Scheduled Payments** card in the **Arrangements** panel to place all scheduled payments in an arrangement on hold.

To place all scheduled arrangements on hold

1. In the **Task Panel** navigation tree, click **Arrangements**.



2. Click **Hold All** and in the confirmation dialog box, click **OK**. The system places a red padlock icon in the Hold column of the data grid. This feature isn't available for Direct Debit payment arrangements.

3. To remove the hold, click **Unhold All** and in the confirmation dialog box, click **OK**. The system removes the red padlock icon from the Hold column of the data grid.

Related Topics

Arrangements

Feedback

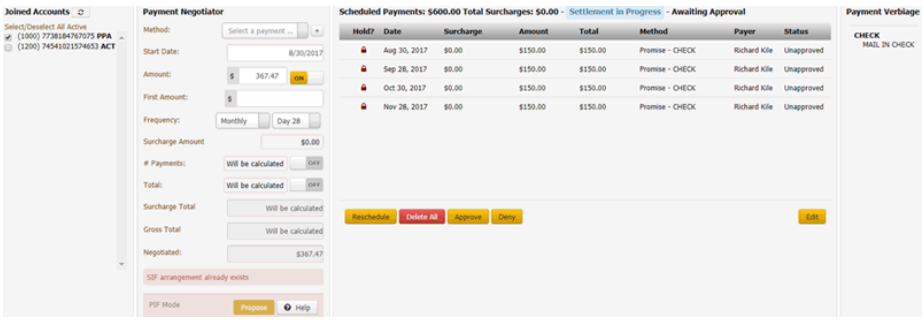
Approve or Deny a SIF Arrangement

Use the **Scheduled Payments** card in the **Arrangements** panel to approve or deny a SIF arrangement with a settlement amount that falls below the minimum settlement amount allowed. The system places the arrangement on hold until you approve it.

Note: If you don't have permission to approve or deny the SIF arrangement, assign the account to the Supervisor queue for processing. For more information about permissions, see the "% Allowed Below Minimum" policy in the User Policy Permission.

To approve or deny a SIF arrangement

1. In the **Task Panel** navigation tree, click **Arrangements**.



2. In the **Scheduled Payments** card, do one of the following:

   - To approve the SIF arrangement, click **Approve**. Latitude removes the hold and changes the status to "scheduled."
   - To deny the SIF arrangement, click **Deny**. Latitude deletes the arrangement.

Related Topics

Arrangements

Feedback

Account Selection

The **Arrangements** panel defaults to the account displayed currently and the party selected in the Account Navigator card. If the account is linked or the party is the primary party on the account, the system displays the **Account Selection** data grid. The data grid includes accounts based on the trust accounting configuration for the parties on the accounts. If you assigned all accounts to the general trust account or the configuration permits posting to the general trust account instead of the party's trust account, you can select multiple accounts. If the party on an account has its own trust account and doesn't permit deposits to the general trust account, only select accounts configured to use the same trust account.

Related Topics

Propose a Payment Arrangement

Modify a Payment Arrangement

Arrangements

Feedback

Payment Spread Selection

If you selected multiple accounts for the arrangement and your organization configured the Payment Spread Permission, you can specify a payment spread method. Otherwise, the system sets a default payment spread method.

Payment Spread Method	Rule
In order	• The system applies payments to the accounts in the selected order (for example, current balance, original balance, customer priority). • When a party pays an account to satisfaction, the system applies any remaining payment amount to the next account in the order until there are no more payments or all accounts are paid. • If you have permissions to select a payment spread, you can also specify the order of the accounts manually.
Even	• The system splits payments evenly across all selected accounts. • When a party pays an account to satisfaction, the system applies any remaining payment amount evenly to the remaining accounts.
Proportional	The system splits payments proportionally across all selected accounts based on the projected current balance on the date of the payment. In theory, if you set the arrangement to satisfy all accounts, all selected accounts are paid to satisfaction on the same payment.
Priority	• The system applies payments toward the selected accounts based on the priority of the customer. • If multiple accounts belong to customers with the same priority, the system applies payments proportionally to the projected current balance on the date of the payment.
Fee	• The system applies payments toward the selected accounts in the order of the payment yielding the highest amount of fee for the agency. • For each payment, the system calculates the projected fee using the fee schedules for the accounts for the full amount of the payment. The system sorts accounts by that projected fee in descending order and spreads the payment over those accounts in that order.

Related Topics

Propose a Payment Arrangement

Modify a Payment Arrangement

Arrangements

Feedback

Settlement Selection

If you have the appropriate permissions and select multiple accounts, you can specify a settlement amount for each account or all accounts proportionally based on the minimum settlement percentage of each account. You can also specify a lock-in settlement percent for a single account and then adjust the percentages on the other accounts.

Policies can alter the blanket settlement percentage set at the client level that drives the minimum settlement percentages for each account.

- The system can adjust the settlement percentage by a set number of percentage points based on the state in which the party resides.
- The system can adjust the settlement percentage by a set number of percentage points, a percentage of the settlement, or override it by a set percentage for the current user.
- If the payment instrument policy doesn't allow settlements below the blanket settlement and the adjusted settlement percentage is below the blanket settlement, the system sets it to the blanket settlement.

The system can also apply the settlement percentage to one of the following calculated money amounts:

- **Net original balance with interest:** Original balance plus all adjustment transactions and accrued interest.
- **Net original:** Original balance and all adjustment transactions without accrued interest.
- **Original balance with interest:** Original balance plus accrued interest but without adjustment transactions.
- **Original balance:** Original balance without adjustment transactions or accrued interest.
- **Current balance:** Current balance of the account at the time you take the arrangement.

The system can apply a second settlement percentage toward the current balance for accounts that already have partial payments and both amounts need satisfied to create a settlement arrangement. For example, the original balance of the account was $100.00. The blanket settlement percentage is 60% and there was a payment of $60.00 on the account. The account technically already meets the settlement requirements. By specifying a 20% current balance requirement to create a settlement arrangement, you must create an arrangement of at least $8.00. Otherwise, with no additional requirements for a settlement, you can create an arrangement for a penny and have that considered a settlement arrangement.

Related Topics

Propose a Payment Arrangement

Modify a Payment Arrangement

Arrangements

Feedback

Payment Arrangement Types

There are three types of payment arrangements that you can negotiate. All three types allow you to negotiate them as a settlement.

- **Single Payment:** For the current date or a future date, and for a specific amount or a percentage of the balance. The payment results summary shows the amount paid or promised, the balance remaining on the account, and the balance percent paid or remaining.
- **Recurring Payments:** Start on a specific date, occur with the same frequency (for example, weekly or monthly), and are for an equal amount. You can adjust individual payment dates and amounts; however, if you modify the other parameters, the system doesn't save your date and amount changes. The payment results summary shows the amount and date of each payment, and the balance remaining on the account after the entire stream.
- **Recurring PIF or SIF payments:** Start on a specific date and occur with the same frequency (for example, weekly or monthly). The system splits the payment amounts based on the negotiated total amount paid or the negotiated balance percent paid at the end of the stream. You can adjust individual payment dates and amounts; however, if you modify the other parameters, the system doesn't save your date and amount changes. The payment results summary shows the amount and date of each payment, the total amount paid after the stream, and the balance remaining on the account after the entire stream.

Related Topics

Arrangements

Feedback

Payment Arrangement Scenarios

The following table provides payment arrangement scenarios for a single account. Each scenario shows the number of payments, the total account balance, the default amount for each payment, the modification to the payment, the result of the modification, and any warnings.

Scenario	Payments	Total Balance	Each Payment Default	Modify	Result	Warning
1	1	$1000				
2	2	$1000	$500	Each amount = $400	Number of payments = 3	Payment 3 estimated at $200.
3	2	$1000	$500	Total amount = $500	Each amount = $250	
4	2	$1000	$500	Each amount = $250	Number of payments = 4 or total amount= $500 with "Is Settlement" check box selected.	
5	2	$1000	$500	Payments = 4	No changes in values.	Overpayment estimated at $1000.

Related Topics

Arrangements

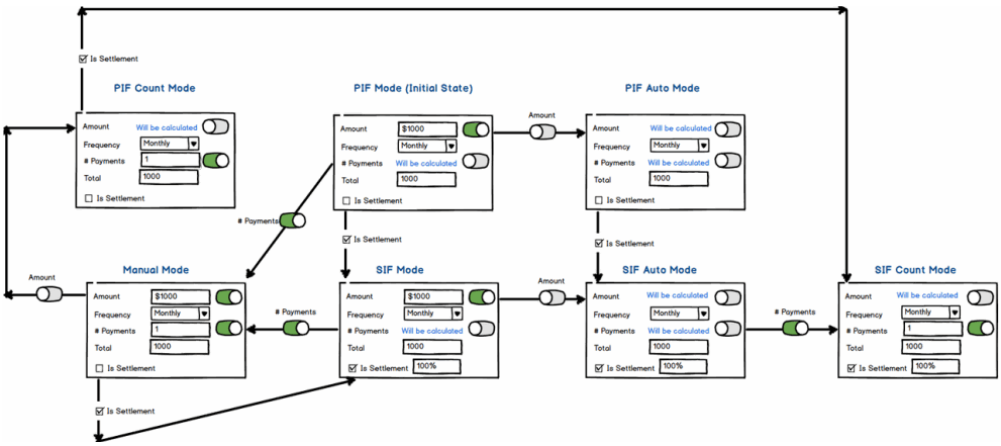
Feedback

Arrangement Negotiator States

The initial state when you start an arrangement negotiation is PIF mode. The following settings do not affect the arrangement negotiator state:

- **Method:** Defaults to "Promise."
- **Start Date:** Defaults to the current date.
- **Frequency:** Defaults to "Monthly."
- **Total:** Defaults to the total account balance for the selected accounts.
- **Negotiated:** Defaults to the total account balance for the selected accounts.

The following diagram illustrates the various arrangement negotiator states and how your changes to the payment amount, number of payments, and settlement indicator affect the state.



PIF mode

Amount: Defaults to "on" with an amount equal to the total account balance for the selected accounts. With the number of payments off and the **Is Selected** check box cleared, if you turn off the payment amount, the system changes the arrangement state to PIF auto mode.

 # Payments: Defaults to "off" to indicate that the system calculates the number of payments. With the amount on and the **Is Selected** check box cleared, if you turn on the number of payments, the system changes the arrangement state to manual mode.

Is Settlement: Defaults to cleared. With the amount on and the number of payments off, if you select this check box, the system changes the arrangement state to SIF mode.

PIF auto mode

Amount: Defaults to "off" to indicate that the system calculates the payment amount.

 # Payments: Defaults to "off" to indicate that the system calculates the number of payments.

Is Settlement: Defaults to cleared. With the amount off and the number of payments off, if you select this check box, the system changes the arrangement state to SIF auto mode.

PIF count mode

Amount: Defaults to "off" to indicate that the system calculates the payment amount.

Payments: Defaults to "on" with a single payment.

Is Settlement: Defaults to cleared. With the amount off and the number of payments on, if you select this check box, the system changes the arrangement state to SIF count mode.

Manual mode

Amount: Defaults to "on" with an amount equal to the total account balance for the selected accounts. With the number of payments on and the **Is Selected** check box cleared, if you turn off the payment amount, the system changes the arrangement state to PIF count mode.

Payments: Defaults to "on" with a single payment.

Is Settlement: Defaults to cleared. With the amount on and the number of payments on, if you select this check box, the system changes the arrangement state to SIF mode.

SIF mode

Amount: Defaults to "on" with an amount equal to the total account balance for the selected accounts. With the number of payments off and the **Is Selected** check box selected, if you turn off the payment amount, the system changes the arrangement state to SIF auto mode.

Payments: Defaults to "off" to indicate that the system calculates the number of payments. With the amount on and the **Is Selected** check box selected, if you turn on the number of payments, the system changes the arrangement state to manual mode.

Is Settlement: Defaults to "true" with a percentage of the account balance to pay set to 100%. With the amount on and the number of payments off, if you clear this check box, the system changes the arrangement state to PIF mode.

SIF auto mode

Amount: Defaults to "off" to indicate that the system calculates the payment amount.

Payments: Defaults to "off" to indicate that the system calculates the number of payments. With the amount off and the **Is Selected** check box selected, if you turn on the number of payments, the system changes the arrangement state to SIF count mode.

Is Settlement: Defaults to "true"with a percentage of the account balance to pay set to 100%. With the amount off and the number of payments off, if you clear this check box, the system changes the arrangement state to PIF auto mode.

SIF count mode

Amount: Defaults to "off" to indicate that the system calculates the payment amount.

Payments: Defaults to "on" with a single payment.

Is Settlement: Defaults to "true"with a percentage of the account balance to pay set to 100%. With the amount off and the number of payments on, if you clear this check box, the system changes the arrangement state to PIF count mode.

Related Topics

Arrangements

Surcharge Rules

The following rules apply to surcharges on payment arrangements:

- If your organization specified a surcharge amount for a payment method or a client fee, a surcharge amount displays when creating a payment arrangement based on the following:
- If the maximum surcharge amount for client fees is blank, the system applies the surcharge amount set up for the payment method (if there is one).
- If the maximum surcharge amount for client fees is zero (0), the system doesn't apply a surcharge amount (regardless if one is set up for the payment method).
- If the maximum surcharge amount for client fees is greater than zero (0), the system applies this surcharge amount.
- For linked accounts with different clients, the system applies the client surcharge amount or payment method surcharge amount, whichever is lowest.
- If your organization allows you to suppress the surcharge on new arrangements, you can remove the surcharge amount when creating a payment arrangement. For more information, see User Policy Permission.
- If a customer resides in a state that doesn't allow surcharges, the surcharge amount on the payment arrangement is zero and you cannot change it. For more information, see State Restriction.

Related Topics

Add a Payment Method

Modify a Payment Method

Maintain Client Fees

Add a State Restriction

Modify a State Restriction

Scheduled Payments - User Policy Permission

Propose a Payment Arrangement

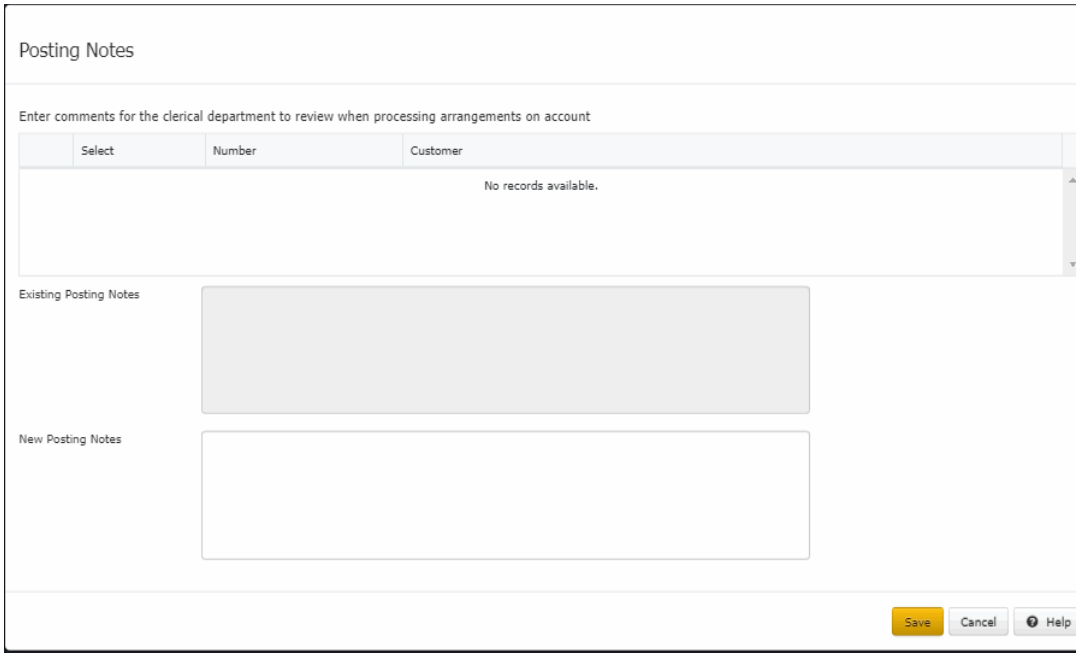
Arrangements

View or Add Posting Notes in Arrangements

Use the Posting Notes in the Arrangements tab to view or add posting notes for an account. Posting notes appear when a user opens the Payments window to add payment information to an account. You do not have to establish a payment arrangement to add a posting note.

To view or add posting notes

1. In the **Arrangements**, click **Posting Notes**. The **Posting Notes** page appears.



2. To view posting notes for an account, in the data grid, click the pin icon of that account. If posting notes exist for the account, they appear in the **Existing Posting Note** section.
3. To add a posting note for one or more accounts, do the following:
4. In the data grid, checkone or more accounts.

   Note: To add all the linked accounts, select the **Select All Linked Accounts** check box.

5. In the **New Posting Note** section, type the posting note and then click **Save**.

Related Topics

Payment Instruments

Arrangements

Payments

Feedback

Payments

Use the **Arrangements** panel to process a single payment within an arrangement, and use the **Batch Processor** page to process a batch of payment transactions for charge-off accounts.

Related Topics

Process a Payment

Process a Payment Batch

View Payment Batch History

Payment Type Codes

Payment Status

Task Panels Permission

Task Panels

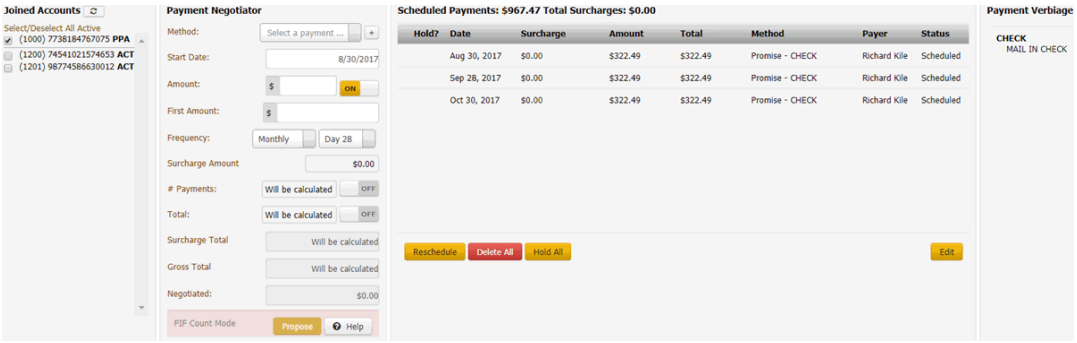
Feedback

Process a Payment

Use the **Arrangements** panel to process a payment that is due on the current date or earlier.

To process a payment

1. In the **Task Panel** navigation tree, click **Arrangements**.



2. In the **Scheduled Payments** card, click **Process**. The system processes the payment, updates the account balance to reflect the payment, and changes the payment status to "completed."

Notes:

- If the system declines a credit card or ACH payment, Latitude places the remaining payments in the arrangement on hold.
- If the arrangement is for a closed account, a message displays indicating that you cannot process a payment for a closed account.
- If the arrangement is for linked accounts, the system doesn't include any closed accounts in the payment spread.
- When Enable Payment Vendor Gateway Permission is enabled and if you try to process a payment using incorrect credit card information, the system declines the payment by displaying a message indicating payment declined, including the reason details.

Related Topics

Payments

Arrangements

Feedback

Process a Payment Batch

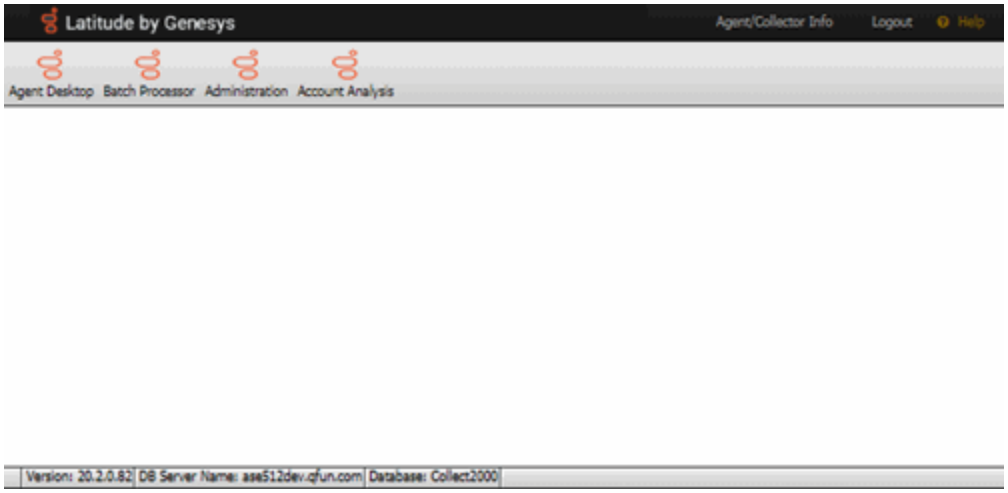
Use the **Batch Processor** page to process a batch of credit card, paper draft, ACH debit, or Direct Debit transactions for charge-off accounts processed on the **Arrangements** or **Payments** panel. The transactions must be active and not on hold, cannot exceed the balance, and are due on the current date or earlier for accounts with an open status. You must have the Access Batch Wizard Permission to process a payment batch.

When you process transactions, the system creates a payment batch for each payment type. The batches include charge-off accounts that the system processed with the vendor but didn't batch already. The system uses the batches to post transactions to the affected accounts. For information about processing a batch to post transactions to accounts, see *Process a Batch* in the Latitude Console documentation.

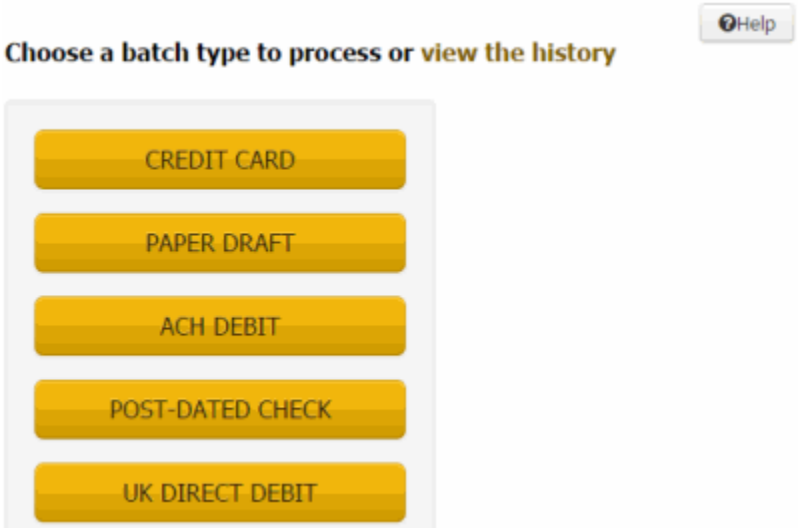
The batches do not include delinquent accounts. The system updates account balances for delinquent accounts during a nightly process and reflects the balances on the accounts the following day.

To process a payment batch

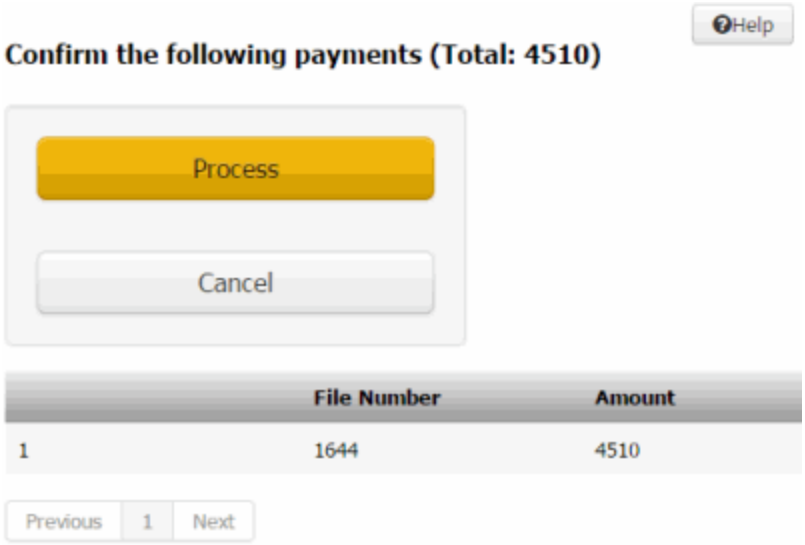
1. Open the **Latitude by Genesys** page.



2. In the menu bar, click **Batch Processor**.



3. Click the type of payment batch to process. A confirmation message appears.



4. Click **Process**. When payment processing is complete, the system displays the results and updates payment history for each account processed.

Notes:

- If payments from a previous session are still processing and you or the system interrupts the process (for example, you close the **Batch Processor** tab), a confirmation dialog box appears. Click **OK** to continue processing the previous session.
- If the payment vendor declines a payment during batch processing (for example, for insufficient funds), the system changes the future scheduled payments to "on hold."
- If an arrangement is for a closed account, a message displays indicating that you cannot process a payment for a closed account.
- If an arrangement is for linked accounts, the system doesn't include any closed accounts in the payment spread.

Result: Outcome of processing the payment batch.

UID: Code that Latitude assigned to identify a payment.

Deposit Date: Date the payment deposited to the account.

Amount: Payment amount, excluding the surcharge.

Surcharge: Surcharge amount.

Total: Sum of the payment amount and surcharge.

Client: Unique code that identifies the client on the account.

Desk: Desk that processed the payment.

File Number: Unique code that the system assigned to identify the account.

Account: Code that the client assigned to identify the account.

Customer ID: Code that identifies a party on the account.

ACH/CC#: Last four digits of the credit card, checking, or savings account number.

Vendor Reference Number: Code that the payment vendor assigned to identify the transaction.

Authorization Code: Code that indicates whether the transaction is authorized or declined.

Message: Note regarding the transaction.

5. On the **Batch Processor** page, click the **X** to close the tab.

Related Topics

Access Batch Wizard Permission

Payments

Arrangements

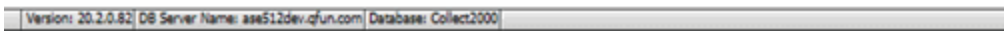
Feedback

View Payment Batch History

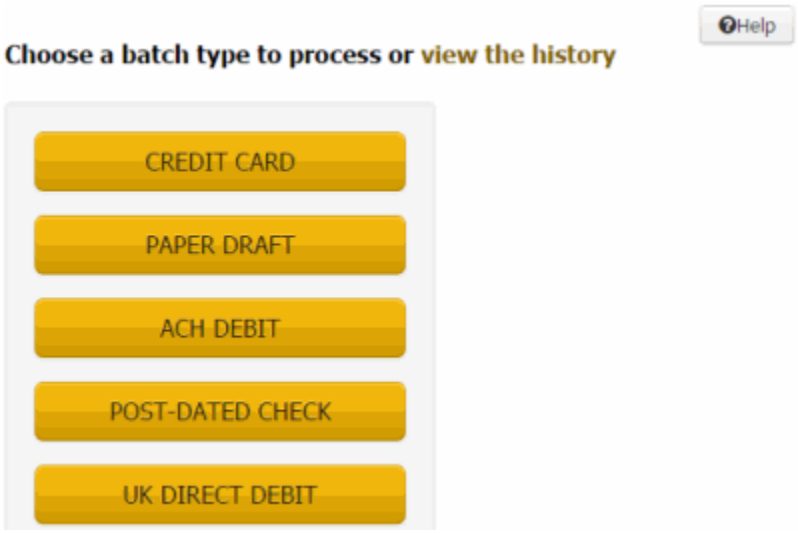
Use the **Batch Processor** page to view processing information for payment batches. You must have the Access Batch Wizard Permission to view payment batch history.

To view payment batch history

1. Open the **Latitude by Genesys** page.



2. In the menu bar, click **Batch Processor**.



3. Click the "**view the history**" link.

Payment Batch Run Id	Started	Completed	User	Total Count	Success Count	Failed Count
1	6/20/16 1:27 pm	6/20/16 1:27 pm	GSadmin	1	1	0
2	6/20/16 2:18 pm	6/20/16 2:19 pm	GSadmin	2	2	0
3	6/20/16 2:23 pm	6/20/16 2:23 pm	GSadmin	1	0	1
4	6/20/16 3:23 pm	6/20/16 3:24 pm	GSadmin	1	1	0

Payment Batch Run ID: Code that Latitude assigns to identify a batch of payments.

Started: Date and time Latitude started processing the batch of payments.

Completed: Date and time Latitude completed processing the batch of payments.

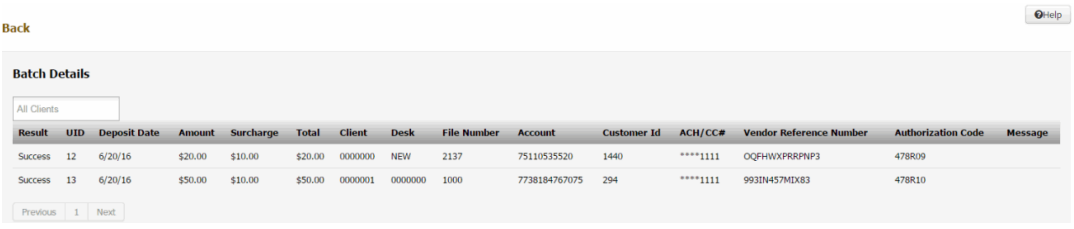
User: Code that identifies the user who processed the batch of payments.

Total Count: Total number of payments in the batch.

Success Count: Number of payments that processed successfully.

Failed Count: Number of payments that failed to process.

4. To view details for a payment batch, click the batch.



Result	UID	Deposit Date	Amount	Surcharge	Total	Client	Desk	File Number	Account	Customer Id	ACH/CC#	Vendor Reference Number	Authorization Code	Message
Success	12	6/20/16	$20.00	$10.00	$20.00	0000000	NEW	2137	75110535520	1440	****1111	OQFHWXPRRPNP3	478R09	
Success	13	6/20/16	$50.00	$10.00	$50.00	0000001	0000000	1000	7738184767075	294	****1111	993IN457MIX83	478R10	

Previous 1 Next

Result: Outcome of processing the payment batch.

UID: Code that Latitude assigned to identify a payment.

Deposit Date: Date the payment deposited to the account.

Amount: Payment amount, excluding the surcharge.

Surcharge: Surcharge amount.

Total: Sum of the payment amount and surcharge.

Client: Unique code that identifies the client on the account.

Desk: Desk that processed the payment.

File Number: Unique code that the system assigned to identify the account.

Account: Code that the client assigned to identify the account.

Customer ID: Code that identifies a party on the account.

ACH/CC#: Last four digits of the credit card, checking, or savings account number.

Vendor Reference Number: Code that the payment vendor assigned to identify the transaction.

Authorization Code: Code that indicates whether the transaction is authorized or declined.

Message: Note regarding the transaction.

5. To display batch details for a specific client, click in the **All Clients** list box and then click the client ID. To remove the filter, backspace over the ID.
6. To return to the payment history list, click **Back**.
7. On the **Batch Processor** page, click the **X** to close the tab.

Related Topics

Access Batch Wizard Permission

Payments

Arrangements

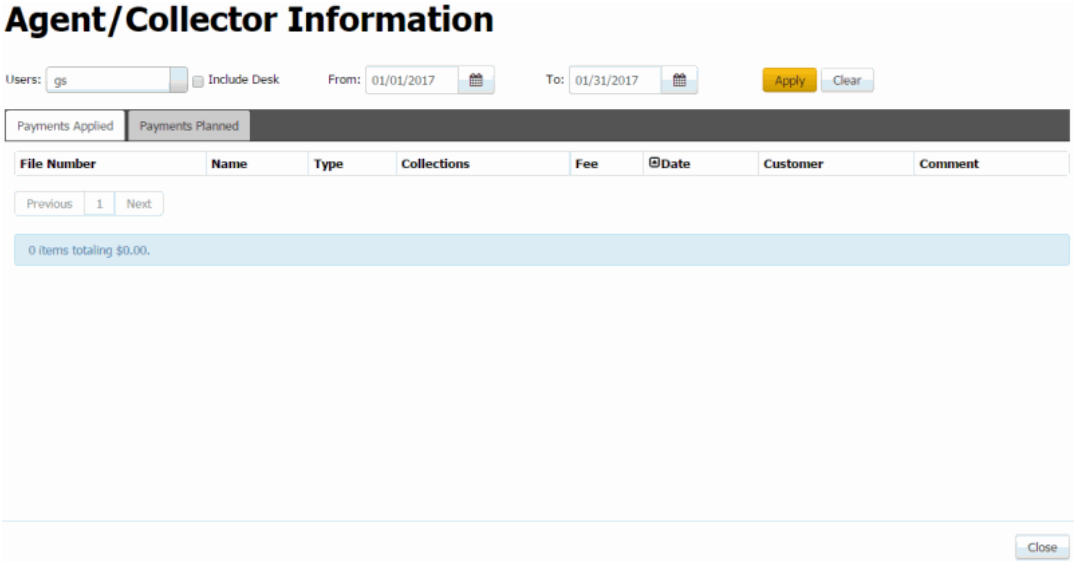
Feedback

View Applied and Planned Payments

Use the **Agent/Collector Information** page to view processed payments and planned payments (post-dated checks, credit cards, and promises) for a specific date range. You must have the View Other User Payments Permission to view payments for other users.

To view applied and planned payments

1. In the Application toolbar, click **Agent/Collector Info**.



Users: Users for which to display payments. The following rules apply:

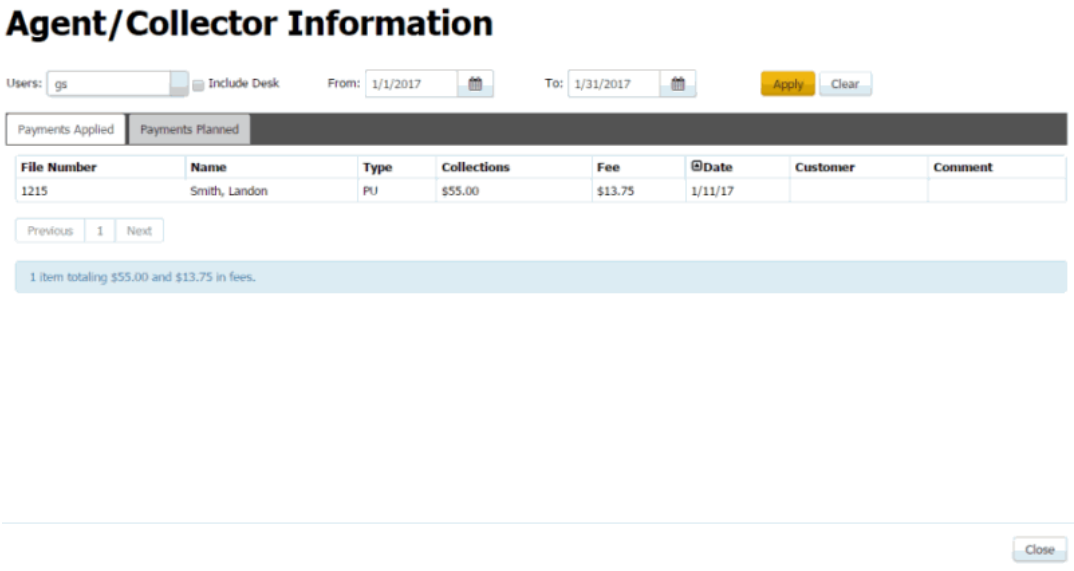
- If you have permission to view payments for other users, the list box includes all users.
- If you don't have permission to view payments for other users and you are:
  - A team lead, the list box includes users on your team only.
  - Not a team lead, the list box includes your user ID only.

Include Desk: If selected, includes payments that the selected user's desk received outside Latitude, such as by mail or Western Union.

From: Beginning date for which to display payments.

To: Ending date for which to display payments.

2. Specify the criteria for which payments to display and then click **Apply**.
3. To view payments applied to accounts, click the **Payments Applied** tab.



File Number: Unique code that the system assigned to identify the account.

Name: Name of the customer on the account.

Type: Code that identifies the type of payment applied. For more information, see Payment Type Codes.

Collections: Payment amount.

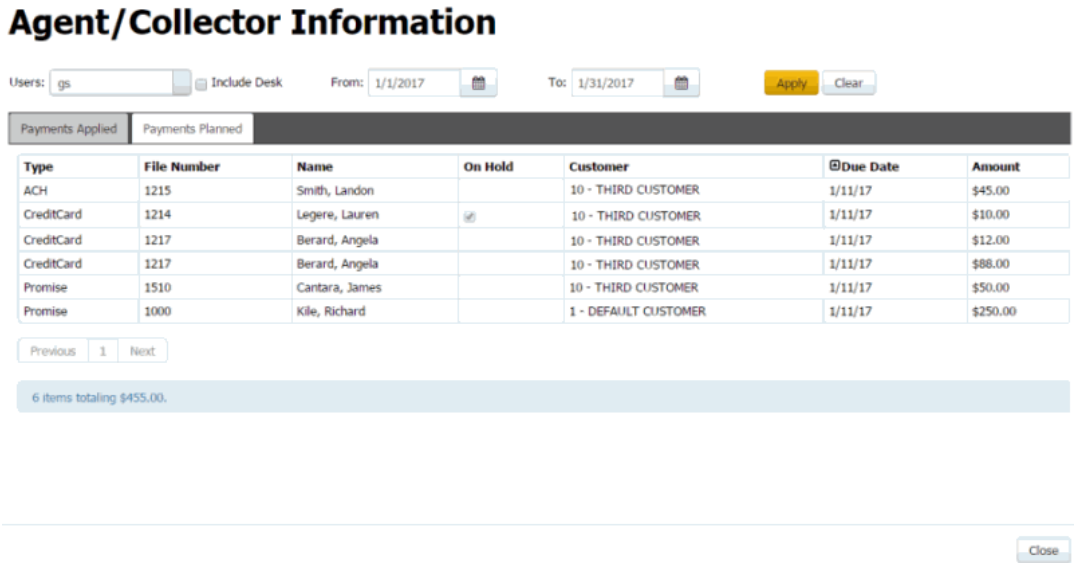
Fee: Collection fee.

Date: Payment date.

Customer: Code that identifies the client associated to the account.

Comment: Note regarding the payment.

4. To view scheduled payments, click the **Payments Planned** tab.



Type: Payment method to use to process the payment (for example, credit card, ACH, paper draft, or promise).

File Number: Unique code that the system assigned to identify the account.

Name: Name of the customer on the account.

On Hold: If selected, the payment is on hold and the system doesn't process it when the due date arrives.

Customer: Code that identifies the client associated to the account.

Due Date: Date the payment is due.

Amount: Payment amount due, excluding the surcharge.

5. When finished, click **Close**.

Related Topics

Payment Type Codes

Payments

Arrangements

Feedback

Payment Type Codes

Payment type codes identify payment types. The following table lists the payment type codes and their description.

Code	Description
DA	**Decreasing Adjustment.** An adjustment to an account that decreases the balance. The system doesn't calculate fees toward this amount and doesn't reflect the adjustment on invoices.
DAR	**Decreasing Adjustment Reversal.** An adjustment to an account that increases the balance. The system doesn't calculate fees toward this amount and doesn't reflect the adjustment on invoices.
PA	**Paid Agency.** A payment to an outside (subcontracted) agency that is collecting payments for your organization.
PAR	**Paid Agency Reversal / Bounce.** A payment by check to an outside (subcontracted) agency collecting on your organization's behalf where the check didn't clear.
PC	**Paid to Client.** A payment to your customer, where your organization holds the account.
PCR	**Paid Client Reversal / Bounce.** A payment by check to your customer, where your organization holds the account and the check didn't clear.
PU	**Paid to Us.** A payment sent directly to your organization.
PUR	**Paid Us Reversal / Bounce.** A payment by check that the customer sent directly to your organization where the check didn't clear.

Related Topics

View Payment History for a Charged-Off Account

Feedback

Payment Status

The following table lists payment statuses and their description.

Status	Description
Authorized	Collector processed the payment. The payment vendor authorized the payment but hasn't charged it.
Batched	Collector processed the payment. The payment vendor authorized the payment and charged it. Collector posted the payment to payment history.
Bounced	Collector processed the payment. The payment vendor authorized the payment, charged it, and then reversed it for a reason such as insufficient funds. Collector posted the payment reversal to payment history.
Canceled	A user canceled the payment before processing occurred.
Completed	Collector processed the payment. The payment vendor authorized the payment and charged it.
Declined	Collector processed the payment and the payment vendor denied or declined it.
Locked	Collector is processing the payment, or a user is editing it. If locked for an extended period of time, it could indicate that the payment system crashed while processing the payment.

On Hold	Collector or a user placed the scheduled payment on hold or the scheduled payment is pending approval. Collector hasn't processed the payment.
Represent	Collector flagged the declined, voided, or bounced payment for reprocessing.
Scheduled	A user approved the scheduled payment and it's ready for processing on the scheduled payment date.
Superseded	A user canceled or deleted the payment, and possibly replaced it, without canceling the arrangement.
Voided	Collector processed the payment. The payment vendor authorized the payment, charged it, and then reversed it.

Related Topics

Arrangements

Communications

Feedback

Communication

Use the **Communication** panel to request letters/Emails/SMS, view pending letter/Emails/SMS requests, delete pending letter/Emails/SMS requests, and view letter/Email/SMS request history. You can also suspend and release a pending letter/Emails/SMS request. The letters available to you are based on settings in Letter Console. To print a requested letter, use Letter Console. For more information, see the *Letter Console* documentation.

Related Topics

Request_a_Communication.htm

Select Accounts

View_Pending_Letter_Requests.htm

Print a Letter

Delete a Pending Letter Request

Suspend a Pending Letter Request

Release the Hold on a Pending Letter Request

View Letter Details

View_Letter_History.htm

Letter Types

Email a Letter

Task Panels Permission

Task Panels

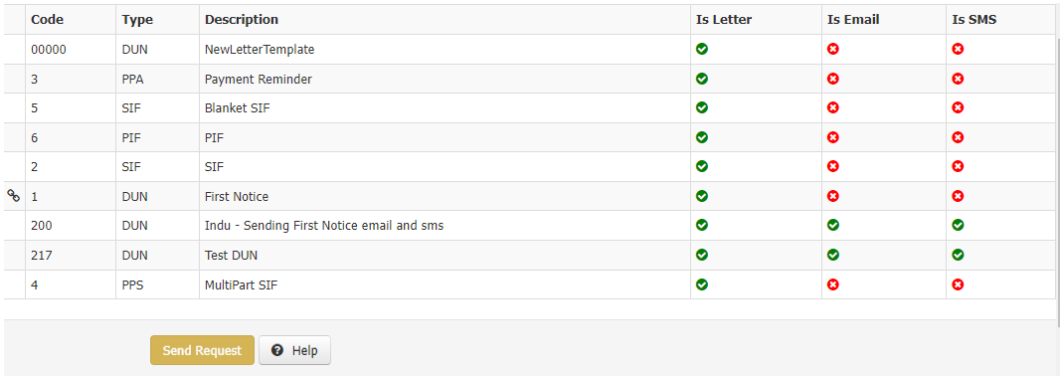
Feedback

Request a Communication

Use the **Request Communication** panel to request a letter/Emails/SMS for one or more parties on the account. The system restricts the available letters to those **letters/Emails/SMS** allowed for the account and client. You must have the Request Permission to request a letter. You must have the Linked Letters Permission to specify the linked accounts to include when requesting a linked letter.

To request a Communication

1. In the **Task Panel** navigation tree, click **Communications** and then click **Request Communication**. The data grid displays the letters that are available for the account.



Link Icon ( ): Indicates that the letter can include information for linked accounts.

Code: Code that identifies a letter.

Type: Type of letter. For more information, see Letter Types.

Description: Description of the letter.

Is Letter: If this option is checked then letter type enabled for letter code.

Is Email: If this option is checked then email type is enabled for Email code.

Is SMS: If this option is checked then only SMS type is enabled for SMS code**.**

Send Request : It is used to send the request type you selected.

2. In the data grid, select the letter to request. The information available is based on the letter selected. For example, some letters require payment amounts and dates.

3. If you selected a multipart SIF letter, do the following:

a. In the **Count** box, type or select the number of payments to show in the letter. **Amount** and **Due Date** boxes appear in the data grid for the number of payments specified.

b. Specify a payment amount and due date for each payment. The due dates must be at least one day apart. If an amount is zero when you click to send the request, the system deletes it from the data grid and doesn't include it in the letter.

c. To delete a payment, in the data grid, click the Delete icon. In the confirmation dialog box, click **Yes**.

4. Complete the information and then click **Send Request**. The letter request appears in the **Pending Letters** panel.

Notes

- Latitude calculates the validation period as 30 days, excluding weekends and holidays from the date the validation notice sent or provided. If the validation notice is sent via letter Latitude, add 5 days to the validation period, excluding weekends and holidays.

- The **Select Accounts** dialog box appears when the account is a linked account, the letter is a linked letter, and your organization configured the Linked Letters permission.

5. If the **Select Accounts** dialog box appears, do the steps to Select Accounts. The letter request appears in the **Pending Letters** panel of each linked account that you select.

Note: The linked letter request feature is available beginning in SU 04 and doesn't affect letter requests created before upgrading to SU 04.

Related Topics

Letter Types

Communication

Request Permission

Linked Letters Permission

Feedback

Select Accounts

Use the **Select Accounts** dialog box to select multiple linked accounts for which to change the account status or request a letter, depending on which task you are performing. This dialog box displays for linked accounts.

To select accounts

1. Do one of the following:

   - Change an Account Status
   - Request a Letter

   The **Select Accounts** dialog box appears.

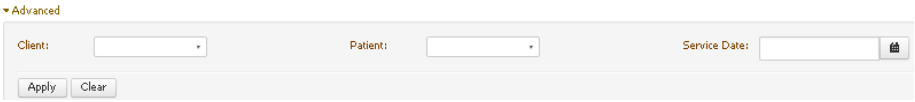
Note: If closed accounts are excluded from the list, a check mark in a red box appears (as shown in the example). If closed accounts are included in the list, an **X** in a blue box appears.

2. Do one of the following:

- To include closed accounts in the list, click the check mark in the red box. An **X** in a blue box appears in place of the check mark.
- To remove closed accounts from the list, click the **X** in the blue box. A check mark in a red box appears in place of the **X**.

3. To select the accounts for which to change the status or request a letter, do one of the following:
   - To include all the linked accounts, select the check box next to **Select/Deselect All** in the column heading.
   - To exclude all the linked accounts (except the account you are working), clear the check box next to **Select/Deselect All** in the column heading.
   - To include an individual linked account, select the corresponding check box.
   - To exclude an individual linked account, clear the corresponding check box.
4. To specify advanced options, do the following:

a. Click **Advanced**. The advanced options appear.



b. To include accounts for a specific client, in the **Client** list box, click the client name.

c. To include accounts for a specific medical patient, in the **Patient** list box, click the patient name.

d. To include accounts for a specific date that the patient received medical care, in the **Service Date** list box, click the service date.

e. Click **Apply**.

5. Click **Save**. If you are changing the status and the selected accounts have an active payment arrangement, a confirmation dialog box appears. Click **OK**.

The system either changes the status of the specified accounts or requests a letter for the specified accounts, depending on what action lead you to this dialog box.

Related Topics

Change an Account Status

Request a Letter

View_Pending_Letter_Requests

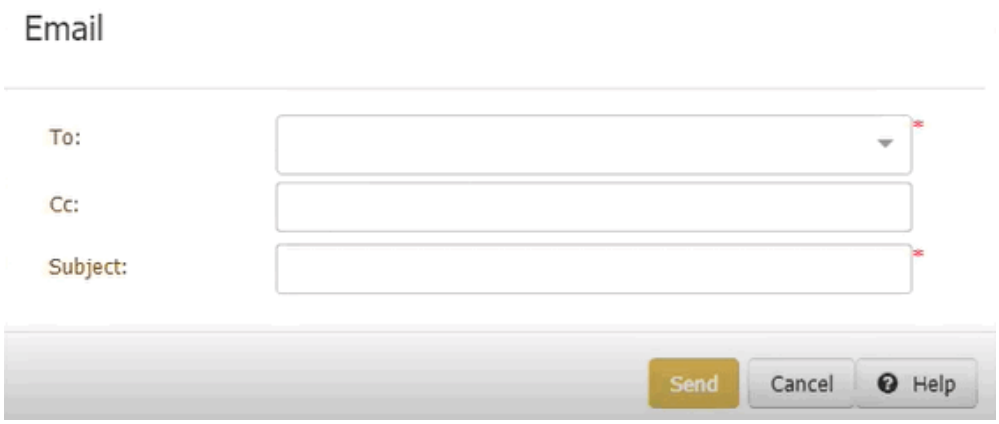
Type topic text here.

Email a Letter

Use the **Pending Letters** section of the **Account Letters** window to email a pending letter to any party. To email a letter you need to set permissions, see SMTP Permission and Email Request Permission.

To email a letter

1. With an account displayed in the **Work Form**, from the menu bar, click **Letters**. The **Account Letters** window appears.
2. In the **Pending Letters** section, click the letter to email.
3. In the toolbar, click **Email**. The **Email** dialog box appears.



To: Email address of person to receive the letter.

CC: Email address of other persons to receive the letter.

Subject: Subject of the email.

Message: Message to appear in the body of the email.

4. Complete the information and then click **Send**. The system sends the email from the email address set up for your company. For more information, see Maintain Company Information.

Related Topics

SMTP Permission

Email Request Permission

Letter Types

Letters

Request Permission

Linked Letters Permission

Print a Letter

Use the **Pending Letters** section of the **Account Letters** window to print a pending letter. You need the appropriate permissions to print a letter. For more information, see Print Request Permission

To print a letter

1. In the **Task Panel** navigation tree, click **Letters**.
2. Click **Pending Letters** and select the letters in the grid.
3. Click **Print**. The **Print** dialog box appears.
4. Modify the printer settings as necessary and then click **OK**.

Note:

Related Topics

Search for a Permission or System Code

Letter Types

Letters

Linked Letters Permission

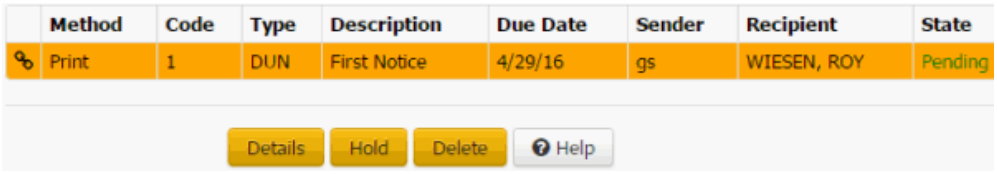
Feedback

Delete a Pending Letter Request

Use the **Pending Letters** panel to delete a pending letter request for the account. To delete a pending letter request, you must have the Delete Request permission.

To delete a pending letter request

1. In the **Task Panel** navigation tree, click **Letters** and then click **Pending Letters**.



2. In the data grid, click the letter and then click **Delete**.
3. In the confirmation dialog box, click **OK**. The system records the deleted letter request in the **Letter History** panel.

Related Topics

Letters

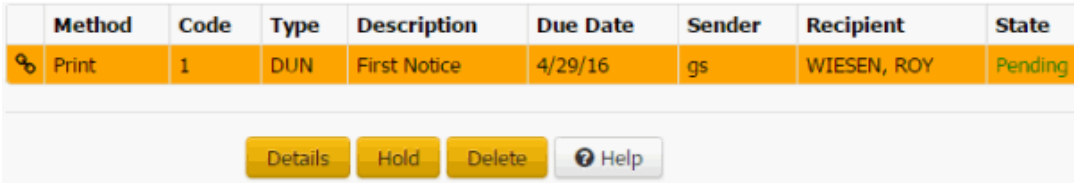
Feedback

Suspend a Pending Letter Request

Use the **Pending Letters** panel to place a hold on a pending letter request for the account. You cannot send a letter or delete a letter request while it is on hold. To place a letter request on hold, you must have the OnHold Request permission.

To suspend a pending letter request

1. In the **Task Panel** navigation tree, click **Letters** and then click **Pending Letters**.



2. In the data grid, click the letter and then click **Hold**. The status of the letter request changes to "Held."

Related Topics

Letters

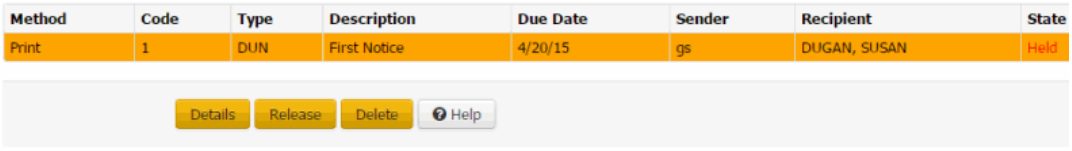
Feedback

Release the Hold on a Pending Letter Request

Use the **Pending Letters** panel to release the hold on a pending letter request for the account. Once released, you can delete the letter request, or, if the letter due date is on or before the current date, send the letter using Letter Console.

To release the hold on a pending letter request

1. In the **Task Panel** navigation tree, click **Letters** and then click **Pending Letters**.



2. In the data grid, click the letter and then click **Release**. The status of the letter request changes to "Pending."

Related Topics

Letters

Feedback

View Letter Details

Use the **Details View** dialog box to view the details for a pending or historical letter for the account.

To view letter details

1. In the **Task Panel** navigation tree, do one of the following:

   - For a pending letter, click **Letters** and then click **Pending Letters**. The **Pending Letters** panel appears.
   - For a historical letter, click **Letters** and then click **Letter History**. The **Letter History** panel appears.

2. In the data grid, click a letter and then click **Details**.

Letter Code: Code that identifies the letter.

Letter Type: Type of letter requested.

Method: Method for delivering the letter (for example, print, email, fax).

Image Available: Indicates whether an electronic image of the letter is available to view.

Date Requested: Date a user requested the letter.

Date Processed: Date a user sent the letter.

Recipient: Person who received the letter.

File #'s: System-assigned file numbers of the accounts included in the letter.

Requester: Person who requested the letter.

Sender: Person who sent the letter.

Error Indicator: Indicates that an error occurred when generating a letter in Letter Console. For example, if the letter contains an incomplete address, an error occurs.

Amount Due: Payment amount due.

Due Date: Payment due date.

Deleted: Indicates whether you canceled the pending letter request.

Client Ref #: Unique code that the system assigned to identify the account.

Client Code: Unique code that your organization assigned to identify the client.

Principal: Past due principal amount.

Interest: Past due interest amount.

Collection Costs: Past due collection costs.

Bad Check Chgs: Past due bad check charges.

Court Cost: Past due court costs.

Attorney Fees: Past due attorney fees.

Misc: Past due miscellaneous charges.

Transaction Charges: Past due transaction charges.

Settlement Amounts: This section appears for settlement letters only.

Item: Number that identifies a payment in the settlement.

Amount: Payment amount due.

Related Topics

Letter Types

Letters

Feedback

Letter Types

The following table lists the types of system-created letters that are available. For more information, see the Letter Console documentation.

Letter Type	Description
Dunning	Initial letter sent to the customer that contains balance and client information. No input allowed.
Settlement	Letter offering settlement terms to the customer. Input allowed for settlement amount offer and due date.
Payoff	Letter to the customer confirming payoff of entire balance. Input allowed for payoff amount and payment due date.
Payment Reminder	Letter reminding the customer to submit a payment. Input allowed for payment amount and due date.
Multi-Part Settlement	Letter confirming agreement with the customer to settle the balance following a payment schedule. Input allowed for number of payments (up to 6), and the amounts and due dates for each payment.
NITD	Notice of Intent to Deposit. Letter to notify the customer that your organization is depositing a post-dated check or paper draft. Input allowed for deposit amount and deposit date.
Customer Letter	This letter type is not in use.
Attorney Letter	Letter to your organization's forwarding attorney regarding the customer. No input allowed.

Customer Letter - Letter to the client regarding the customer. No input allowed. REMOVED: For third-part only.

Related Topics

Letters

Legal Case

Feedback

Legal Case

Use the **Legal** panel to maintain court case information for customers in litigation for payment. Most of the data is available for creating merge letters for legal documents using Letter Console.

Related Topics

Maintain General Legal Information

Assign a Court

Judgments

Garnishments

Accounting

Delete a Legal Case

Task Panels Permission

Task Panels

Feedback

Maintain General Legal Information

Use the **General** tab to maintain general legal information for the account.

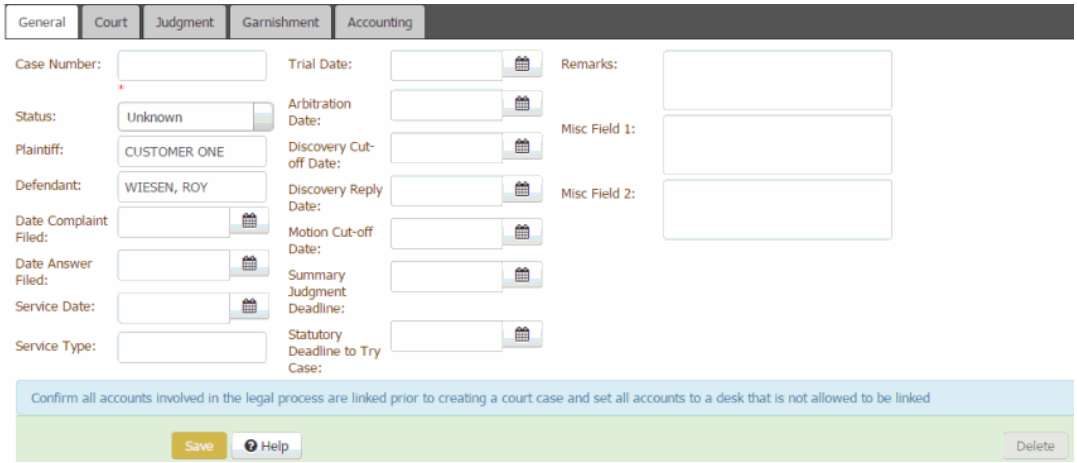
Notes:

- Before creating a legal case, link all accounts involved in the suit and unlink those that aren't.
- After creating a legal case, don't add other accounts to the link group as the system won't include them in the judgment. We recommend that you move the linked accounts to a desk that doesn't allow linking (**Prevent linking of accounts in this desk** check box is selected) to prevent adding accounts to the link group accidentally. For more information, see Add a Desk, Modify a Desk, and Change a Desk Assignment.
- If you didn't link all the accounts involved in the suit or you didn't unlink accounts not involved in the suit before creating the legal case, do the following:
  - Delete the legal case. For more information, see Delete a Legal Case.
  - Link the accounts involved in the suit and unlink the accounts not involved in the suit.
  - (Recommended) Move the accounts to a desk that doesn't allow linking.
  - Recreate the legal case.

To maintain general legal information

1. In the **Task Panel** navigation tree, do one of the following:
   - To add a court case, click **New Court Case**.
   - To modify a court case, click the court case number.

   The **General** tab appears.



Case Number: Court case number.

Status: Status of the legal case.

Plaintiff: Person who filed the complaint.

Defendant: Person defending the case. This box defaults to the primary customer's name.

Date Complaint Filed: Date the Plaintiff filed the complaint with the court.

Date Answer Filed: Date the Defendant filed the response to the complaint with the court.

Service Date: Date the court served notice to the Defendant.

Service Type: Type of legal service.

Trial Date: Date and time of the trial.

Arbitration Date: Date and time of arbitration.

Discovery Cut-off Date: Deadline for discovery requests.

Discovery Reply Date: Deadline for discovery responses.

Motion Cut-off Date: Deadline for filing a motion to reopen discovery.

Summary Judgment Deadline: Deadline for filing summary judgment motions.

Statutory Deadline to Try Case: Statutory deadline for trying the case.

Remarks: Comments regarding the case.

Misc Field 1: Use this box to store whatever information you choose.

Misc Field 2: Use this box to store whatever information you choose.

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

Related Topics

Legal Case

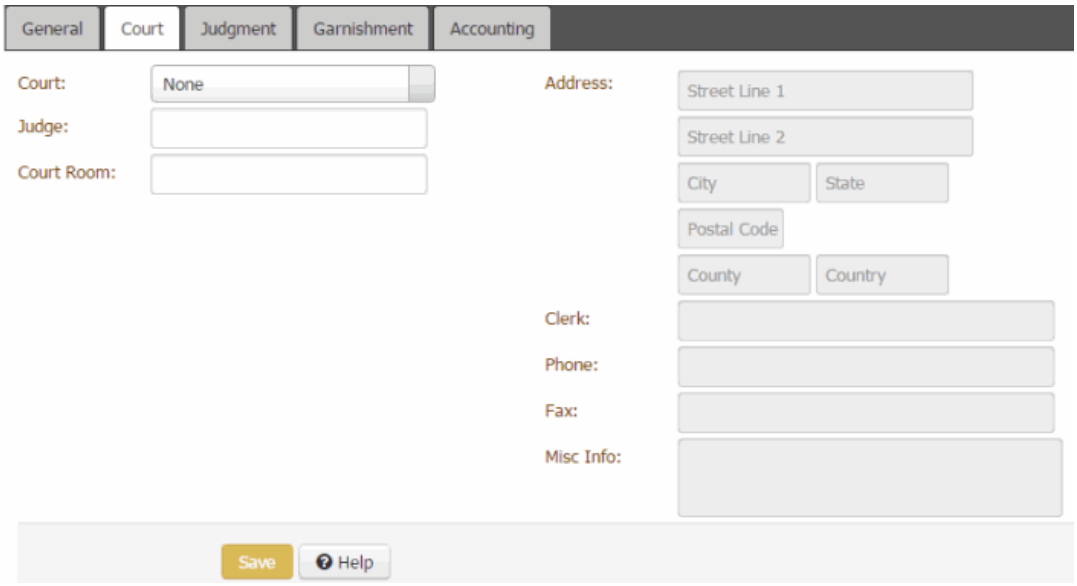
Legal Court Case Statuses

Assign a Court

Use the **Court** tab to assign a court to a legal case for the account. Specify a court case number on the **General** tab before assigning a court.

To maintain a court

1. In the **Task Panel** navigation tree, click a case number.
2. Click the **Court** tab.



Court: Name of the court.

Judge: Name of the presiding judge.

Court Room: Court room where the judge presides.

Address: Court address.

County: Court county.

Clerk: Name of the court clerk.

Phone: Court clerk's phone number.

Fax: Court clerk's fax number.

Misc Info: Miscellaneous information related to the court.

Jurisdiction: Geographic area where the court has legal authority.

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

Related Topics

Legal Case

Courts

Judgments

Feedback

Judgments

Use the **Judgment** tab to award and reverse judgments on the account. To award or reverse a judgment, you must specify a court case number, assign a court name, and specify a judgment spread.

Related Topics

Specify Judgment Award Amounts

Spread Judgment Award Amounts

Award a Judgment

Reverse a Judgment

Update Interest on Linked Accounts in a Judgment

Maintain General Legal Information

Assign a Court

Legal Case

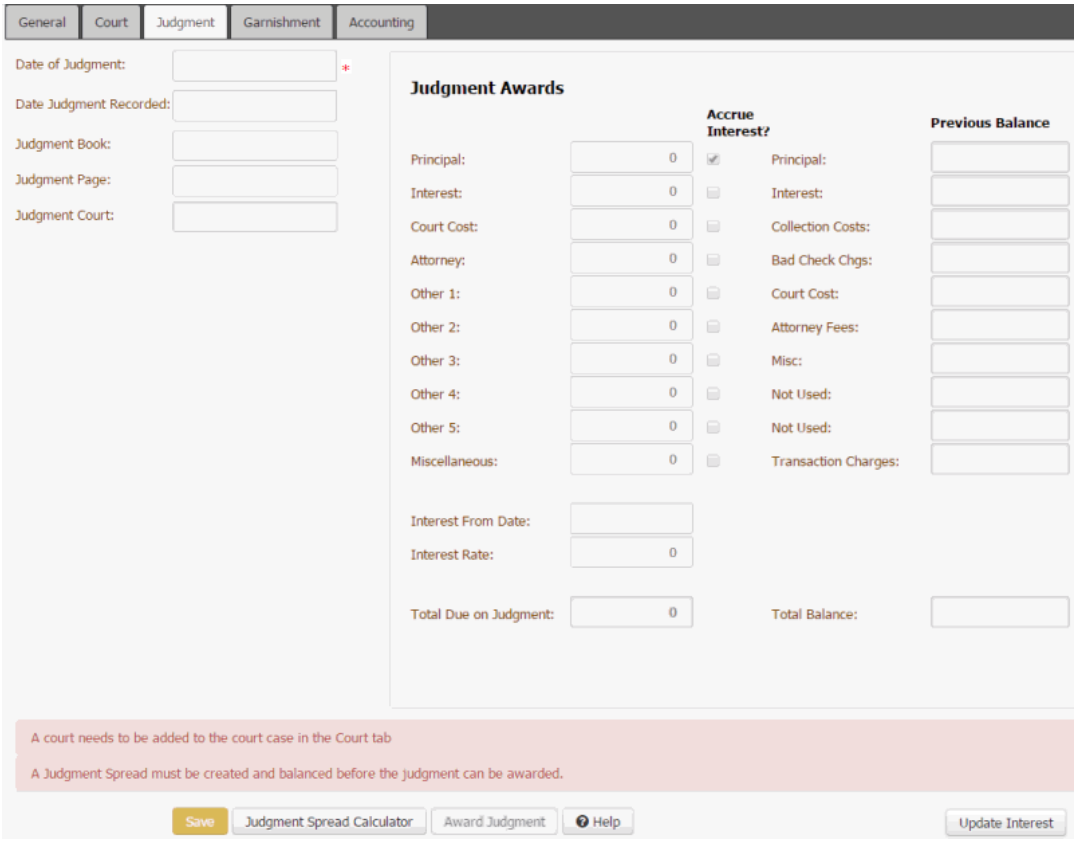
Feedback

Specify Judgment Award Amounts

Use the **Judgment** tab to specify the judgment award amounts for the account. Ensure that you specified a case number and assigned a court. For more information, see Maintain General Legal Information and Assign a Court.

To specify judgment Award Amounts

1. In the **Task Panel** navigation tree, do one of the following:
    - To add a court case, click **New Court Case**, specify a court case number, and then click **Save**.
    - To modify a court case, click the court case number.
2. Click the **Judgment** tab.



Date of Judgment: Date the court awarded judgment. You cannot save the judgment unless you specify this date.

Date Judgment Recorded: Date the court clerk recorded the judgment in the judgment book.

Judgment Book: Book that contains the recording information received from the court.

Judgment Page: Page that contains the recording information received from the court.

Judgment Court: Court that awarded the judgment. The system pulls this information from the **Court** tab.

Principal: Principal amount awarded in the judgment.

Interest: Interest amount awarded in the judgment.

Court Cost: Court costs awarded in the judgment.

Attorney: Attorney fees awarded in the judgment.

Other 1 through **Other 5:** Other fees awarded in the judgment. You can specify up to five other fees.

Miscellaneous: Miscellaneous costs awarded in the judgment.

Interest From Date: Date to start calculating interest on the total judgment award amount at the specified interest rate.

Interest Rate: Interest rate to use to calculate interest on the total judgment award amount.

Total Due on Judgment: Total amount that the court awarded on the judgment. The system calculates this amount. It doesn't include fees that you apply after the judgment date (for example, garnishment fees).

Accrue Interest: If selected, the system includes the associated money bucket when calculating accrued interest. You cannot select or clear the **Principal** or **Interest** check boxes. If your organization didn't map a money bucket to an award bucket, you cannot select or clear the corresponding check box.

Note: The system populates the following boxes and you cannot change them on this tab.

Principal: Amount of the account balance that is principal (money bucket 1).

Interest: Amount of the account balance that is interest (money bucket 2).

Transaction Charges: Amount of the account balance that is transaction charges (money bucket 10).

Note: The remaining amounts (for example, Collection Costs) are for money buckets 3 through 9. The labels vary based on how your organization set up your system. For more information, see Maintain Money Titles.

Total Balance: Total account balance (sum of all money buckets).

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

Note: You cannot save the judgment information until you specify a case number on the **General** tab, assign a court on the **Court** tab, and specify a judgment date on the **Judgment** tab.

4. Do the steps to Spread Judgment Award Amounts.

Related Topics

Judgments

Maintain General Legal Information

Assign a Court

Maintain Money Titles

Feedback

Spread Judgment Award Amounts

Use the **Judgment Spread Calculator** dialog box to spread a judgment award across money buckets and any accounts linked to the account. You can have the system spread the award proportionally based on existing account balances or you can specify the amount to apply to each bucket and linked account.

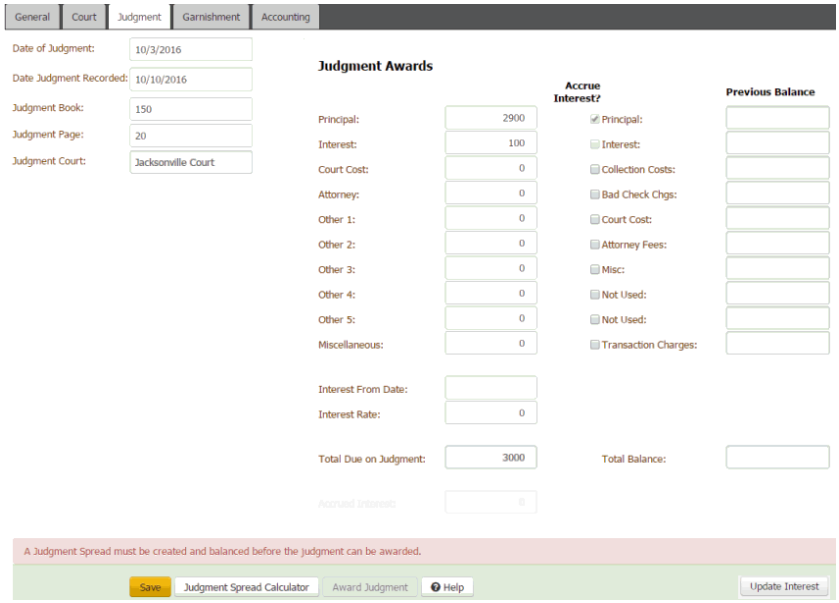
To spread judgment award amounts

1. In the **Task Panel** navigation tree, do one of the following:

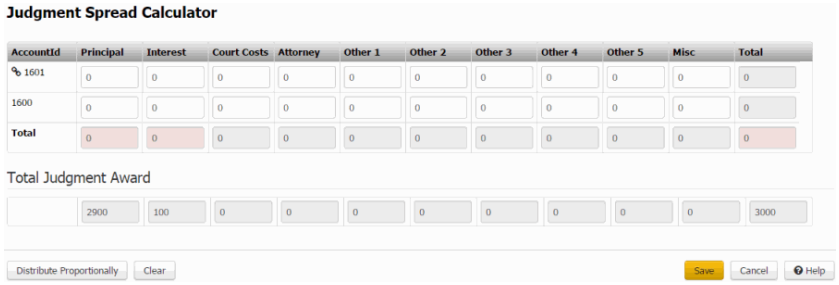
   - To add a court case, click **New Court Case**, specify a court case number, and then click **Save**.

   - To modify a court case, click the court case number.

2. Click the **Judgment** tab.



3. Click **Judgment Spread Calculator**. The **Judgment Spread Calculator** dialog box appears.



Note: If the total amount for a specific column is greater than or less than the judgment amount awarded, the total box for that column appears with a red background.

Account ID: Unique code that the system assigned to identify the account. If a Link icon displays next to an account, the account is the driver (main) account in the group of joined accounts.

Notes:

- If the awarded amount is 100% of the amount owed, the system populates the following boxes with the amounts that exist on the account currently in the corresponding buckets.
- If the awarded amount is less than 100% of the amount owed, the system spreads the amount proportionally across the linked accounts and populates the following boxes with those amounts.
- The system applies awarded fees and costs to the link driver account only.
- If your organization didn't map a money bucket to an award bucket, you cannot specify a spread amount for that money bucket.

Principal: Amount of the award to apply to the Latitude money bucket that your organization mapped to the Principal award bucket.

Interest: Amount of the award to apply to the Latitude money bucket that your organization mapped to the Interest award bucket.

Court Costs: Amount of the award to apply to the Latitude money bucket that your organization mapped to the Court Costs award bucket.

Attorney: Amount of the award to apply to the Latitude money bucket that your organization mapped to the Attorney award bucket.

Other 1: Amount of the award to apply to the Latitude money bucket that your organization mapped to the Other 1 award bucket.

Other 2: Amount of the award to apply to the Latitude money bucket that your organization mapped to the Other 2 award bucket.

Other 3: Amount of the award to apply to the Latitude money bucket that your organization mapped to the Other 3 award bucket.

Other 4: Amount of the award to apply to the Latitude money bucket that your organization mapped to the Other 4 award bucket.

Other 5: Amount of the award to apply to the Latitude money bucket that your organization mapped to the Other 5 award bucket.

Misc: Amount of the award to apply to the Latitude money bucket that your organization mapped to the principal judgment award bucket.

Total: Total judgment amount awarded for the account.

Total (row): Total judgment amount awarded for each column. If the total amount for a specific column is greater than or less than the amount awarded, the total box for that column appears with a red background.

Total Judgment Award section - The system populates this section using the values you specified on the Judgments tab.

Principal: Judgment amount awarded for principal.

Interest: Judgment amount awarded for interest.

Court Costs: Judgment amount awarded for court costs.

Attorney: Judgment amount awarded for attorney costs.

Other 1 through **Other 5:** Judgment amount awarded for other costs.

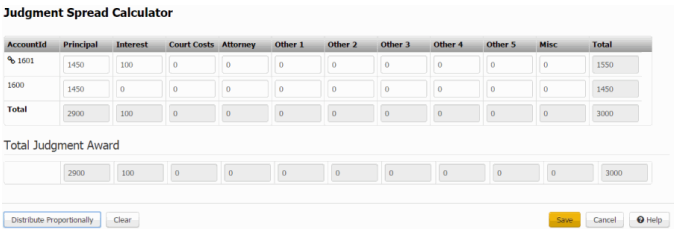
Misc: Judgment amount awarded for miscellaneous costs.

[Column] Total: Total Judgment amount awarded.

[Row] Total: Total Judgment amount awarded.

4. Do one of the following:

   - To spread the award proportionally, click **Distribute Proportionally**. The system calculates the spread based on the account balances and populates the boxes accordingly.



- To specify the amount of the award to apply to each bucket and each linked account, type the amounts in the boxes.

Note: If the total amount to apply doesn't equal the total judgment amount awarded, the boxes appear in red and you cannot save your changes.

5. Click **Save**.
6. On the **Judgment** tab, click **Save**.
7. Do the steps to Award a Judgment.

Related Topics

Judgments

Legal Case

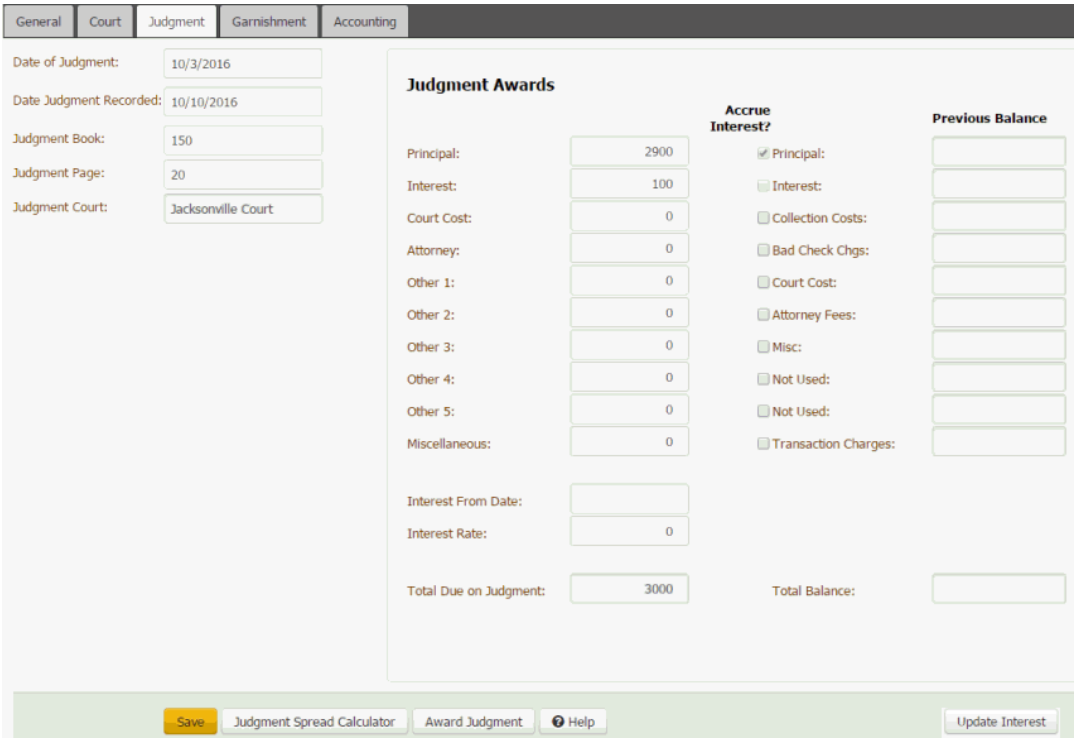
Feedback

Award a Judgment

Use the **Judgment** tab to award judgment on the account. You cannot award a judgment until you specify a judgment spread. For more information, see Spread Judgment Award Amounts. You must have the Award/Reverse Judgment Permission and Judgment Award Bucket Mappings Permission.

To award a judgment

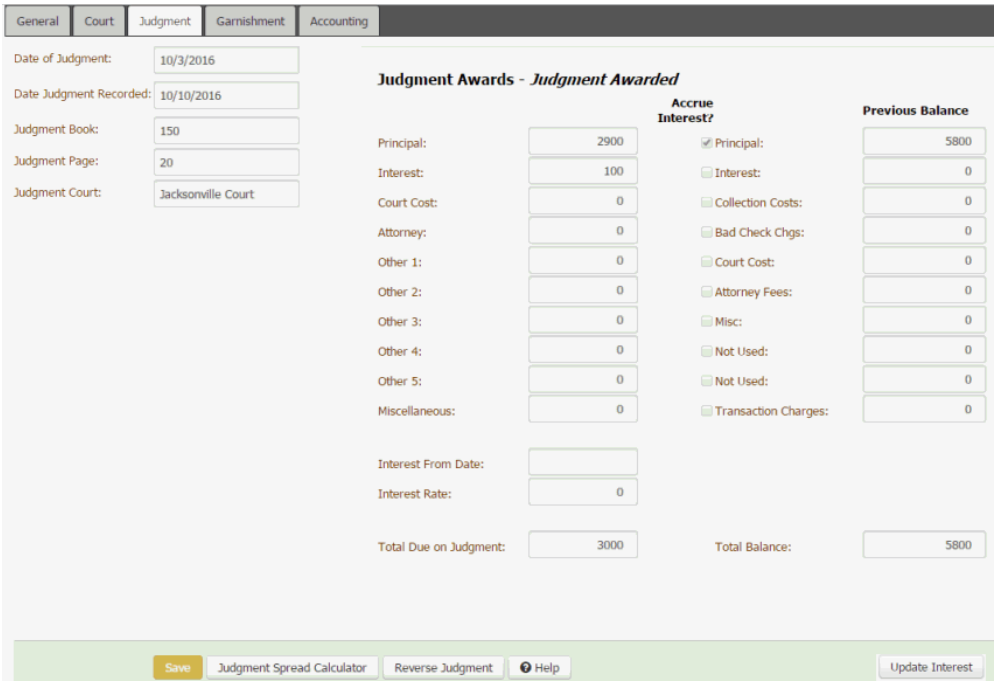
1. In the **Task Panel** navigation tree, do one of the following:
   - To add a court case, click **New Court Case**, specify a court case number, and then click **Save**.
   - To modify a court case, click the court case number.
2. Click the **Judgment** tab.



3. Click **Award Judgment**. A confirmation dialog box appears.

Note: You cannot award the judgment until you specify a judgment spread.

4. Click **OK**. The system populates the money buckets in the **Previous Balance** column on the **Judgment** tab with the spread amounts.



Note: Custodian updates the interest on the linked accounts in the judgment when the nightly process runs. However, you can update the interest immediately. For more information, see Update Interest on Linked Accounts in a Judgment.

Related Topics

Judgments

Award/Reverse Judgment Permission

Judgment Award Bucket Mappings Permission

Legal Case

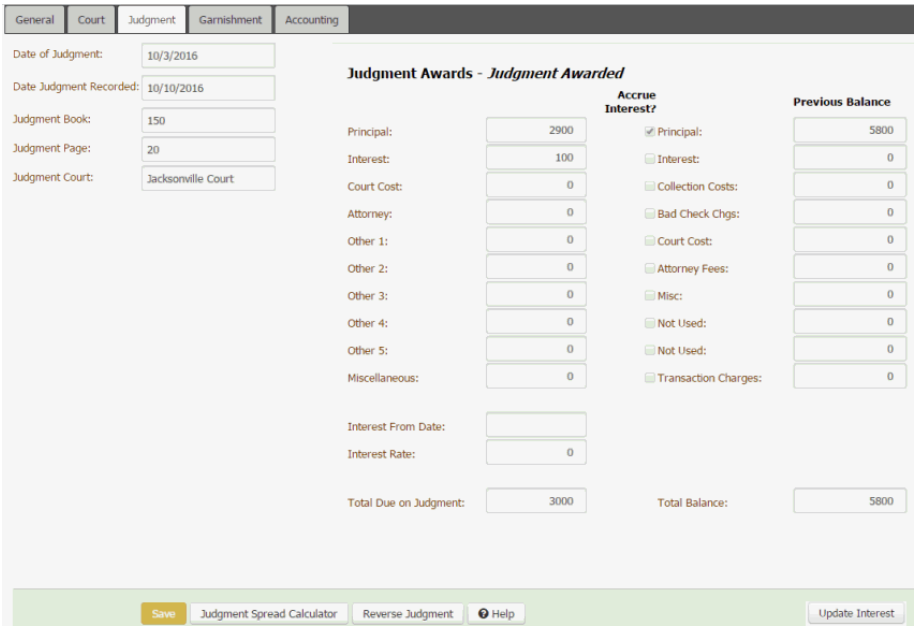
Feedback

Reverse a Judgment

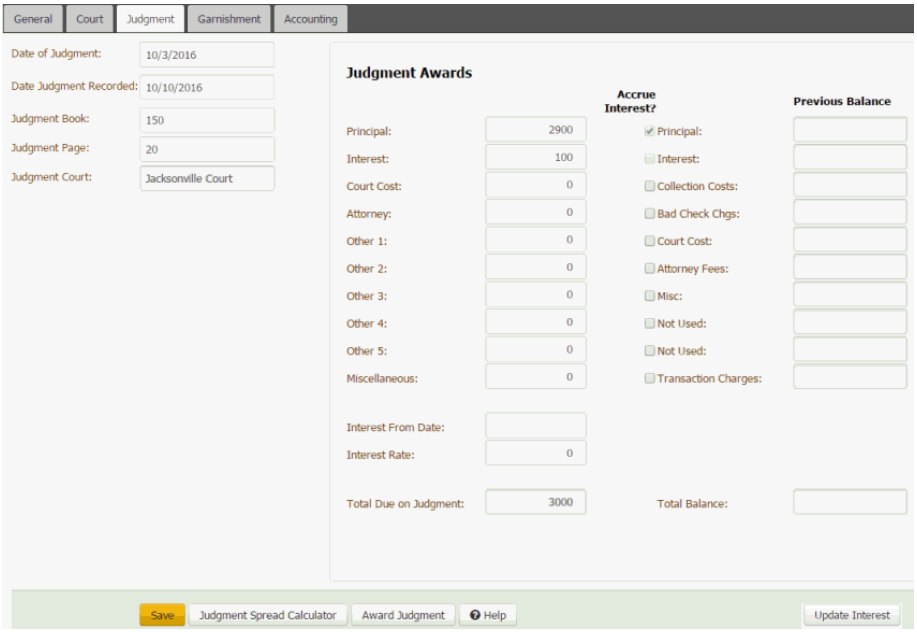
Use the **Judgment** tab to reverse judgment on an appealed case or when the court entered the judgment in error for the account. You must have the Award/Reverse Judgment Permission and Judgment Award Bucket Mappings Permission.

To reverse a judgment

1. In the **Task Panel** navigation tree, do one of the following:
   - To add a court case, click **New Court Case**, specify a court case number, and then click **Save**.
   - To modify a court case, click the court case number.
2. Click the **Judgment** tab.



3. Click **Reverse Judgment**. A confirmation dialog box appears.
4. Click **OK**. The system clears the money buckets in the **Previous Balance** column on the **Judgment** tab and reverts the values on the account to their pre-judgment award amounts.



Related Topics

Judgments

Award/Reverse Judgment Permission

Judgment Award Bucket Mappings Permission

Legal Case

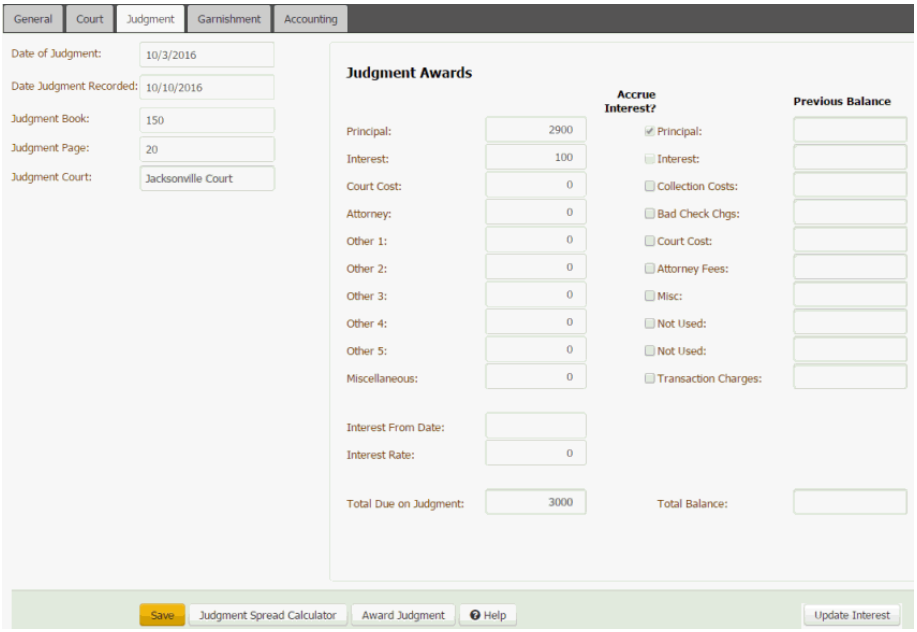
Feedback

Update Interest on Linked Accounts in a Judgment

Use the **Judgment** tab to update interest on the linked accounts in an awarded judgment. Custodian updates the interest when the nightly process runs. However, you can update the interest immediately. You must have the Update Interest Permission.

To update interest on linked accounts in a judgment

1. In the **Task Panel** navigation tree, do one of the following:
    - To add a court case, click **New Court Case**, specify a court case number, and then click **Save**.
    - To modify a court case, click the court case number.
2. Click the **Judgment** tab.



3. Click **Update Interest**. A confirmation dialog box appears.
4. Click **OK**. The system updates the interest for all the linked accounts in the judgment.

Related Topics

Judgments

Award/Reverse Judgment Permission

Judgment Award Bucket Mappings Permission

Legal Case

Garnishments

Garnishments

Use the **Garnishments** tab to maintain wage garnishments for the account. To award or reverse a judgment, you must specify a court case number, assign a court name, and specify a judgment spread.

Related Topics

Add a Garnishment

Modify a Garnishment

Delete a Garnishment

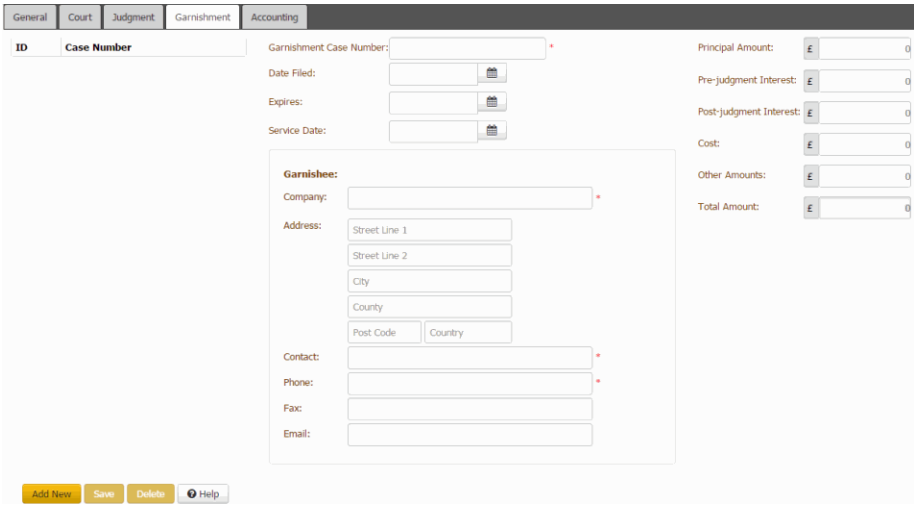
Legal Case

Add a Garnishment

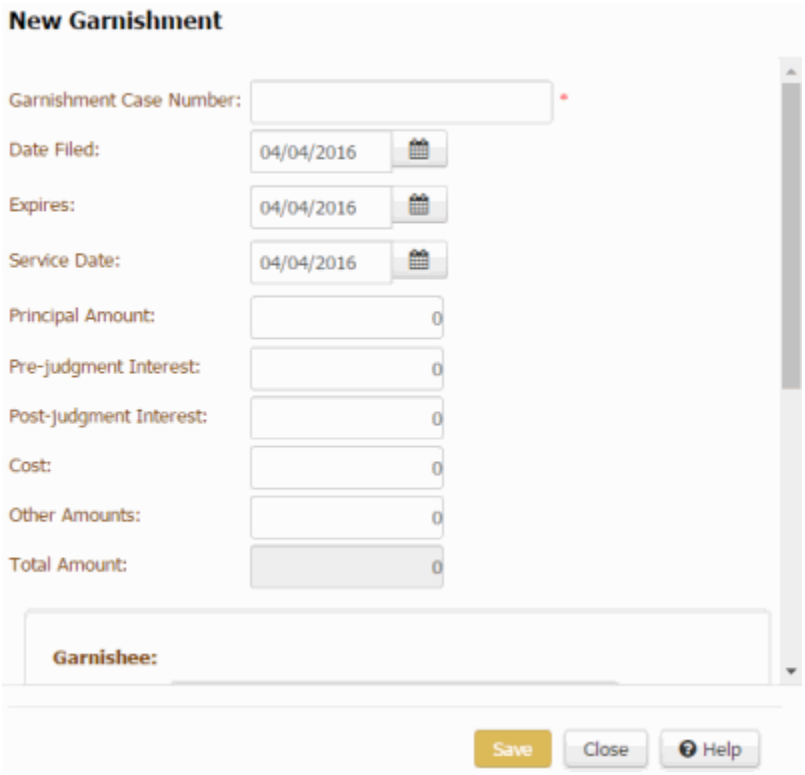
Use the **New Garnishment** dialog box to add a wage garnishment for the account.

To add a garnishment

1. In the **Task Panel** navigation tree, click a case number.
2. Click the **Garnishment** tab.



3. Click **Add New**.



Garnishment Case Number: Court case number for the garnishment.

Date Filed: Date the client filed the garnishment with the court.

Expires: Date the garnishment ends.

Service Date: Date the court served the garnishment summons.

Principal Amount: Initial amount of money the garnishment is to repay.

Pre-judgment Interest: Interest that accrued before you went to court to obtain a judgment against the customer.

Post-judgment Interest: Interest on the judgment that accrues from the time the court clerk records the judgment until the customer pays the debt.

Cost: Costs for filing the garnishment, such as filing fees, that you can recover.

Other Amounts: Other costs related to the garnishment, such as processing fees, that you can recover.

Total Amount: Total amount of the garnishment. This amount includes the principal amount, interest, costs, and other amounts.

Company: Company to whom the court issued the garnishment summons.

Address: Garnishee's street address, city, state, postal code, county, and country.

Contact: Name of the contact person at the company.

Phone: Contact person's phone number.

Fax: Contact person's fax number.

Email: Contact person's email address.

4. Complete the information and then click **Save**.

Related Topics

Garnishments

Legal Case

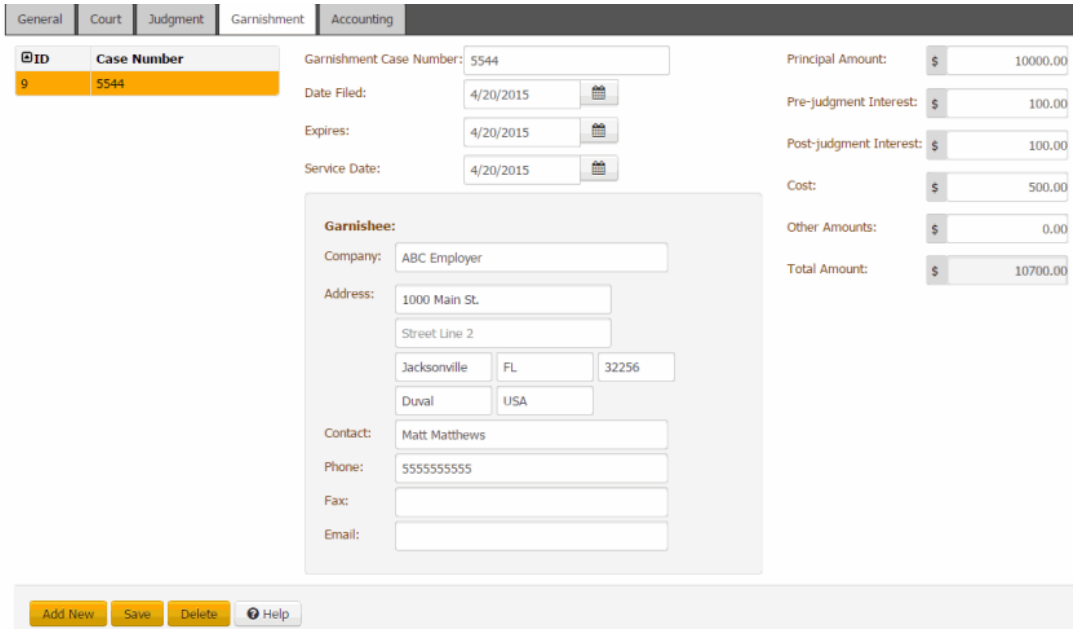
Feedback

Modify a Garnishment

Use the **Garnishment** tab to modify a wage garnishment for the account.

To modify a garnishment

1. In the **Task Panel** navigation tree, click a case number.
2. Click the **Garnishment** tab.
3. Click a garnishment case number to display its information.



Garnishment Case Number: Court case number for the garnishment.

Date Filed: Date the client filed the garnishment with the court.

Expires: Date the garnishment ends.

Service Date: Date the court served the garnishment summons.

Principal Amount: Initial amount of money the garnishment is to repay.

Pre-judgment Interest: Interest that accrued before you went to court to obtain a judgment against the customer.

Post-judgment Interest: Interest on the judgment that accrues from the time the court clerk records the judgment until the customer pays the debt.

Cost: Costs for filing the garnishment, such as filing fees, that you can recover.

Other Amounts: Other costs related to the garnishment, such as processing fees, that you can recover.

Total Amount: Total amount of the garnishment. This amount includes the principal amount, interest, costs, and other amounts.

Company: Company to whom the court issued the garnishment summons.

Address: Garnishee's street address, city, state, postal code, county, and country.

Contact: Name of the contact person at the company.

Phone: Contact person's phone number.

Fax: Contact person's fax number.

Email: Contact person's email address.

4. Complete the information and then click **Save**.

Related Topics
Garnishments

Legal Case

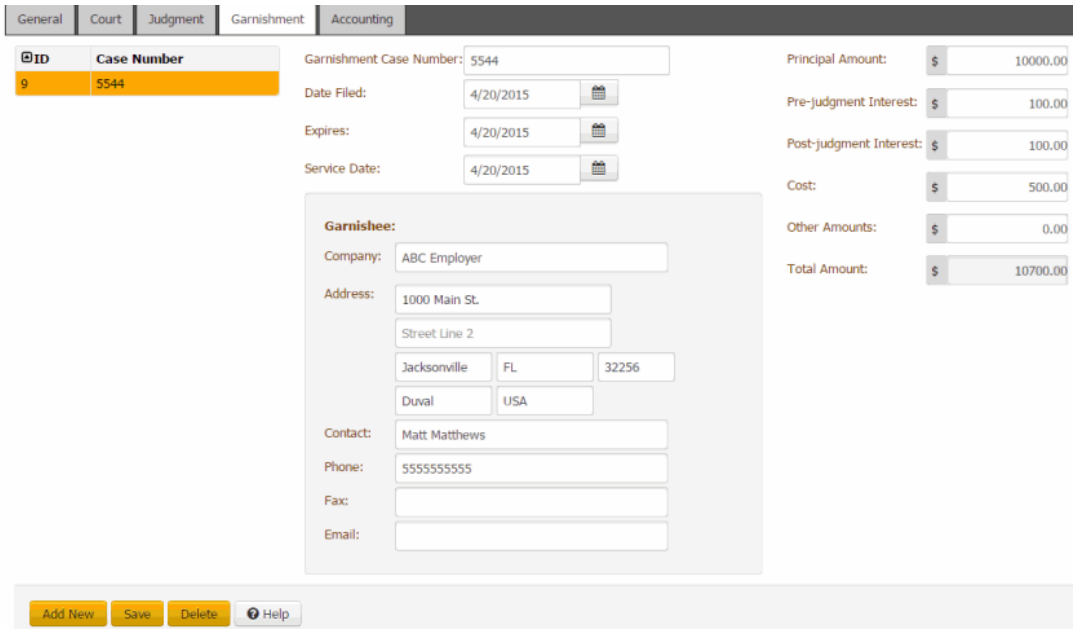
Feedback

Delete a Garnishment

Use the **Garnishment** tab to delete a garnishment for the account.

To delete a garnishment

1. In the **Task Panel** navigation tree, click a case number.
2. Click the **Garnishment** tab.



3. Click the garnishment case number and then click **Delete**.
4. In the Confirmation dialog box, click **OK**.

Related Topics
Garnishments

Legal Case

Accounting

Feedback

Accounting

Use the **Accounting** tab to maintain legal accounting information for the account.

Related Topics
View Legal Accounting Information

Add a Legal Ledger Item

Modify a Legal Ledger Item

Delete a Legal Ledger Item

Legal Case

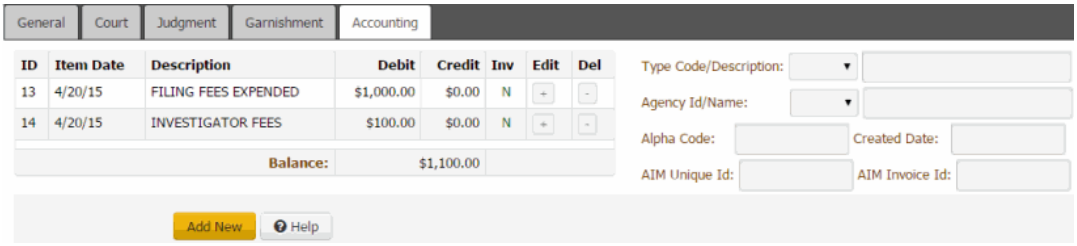
Feedback

View Legal Accounting Information

Use the **Accounting** tab to view legal accounting information for the account.

To view legal accounting information

1. In the **Task Panel** navigation tree, click a case number.
2. Click the **Accounting** tab.



ID: Code that identifies the transaction.

Item Date: Date the transaction occurred.

Description: Ledger account associated to the transaction.

Debit: Debit amount associated to the transaction.

Credit: Credit amount associated to the transaction.

Inv: Indicates whether the system invoiced the transaction.

Balance: Sum of the transaction amounts. If the system enclosed the balance in parentheses, the balance is a debit (or decreasing) amount. Otherwise, the balance is a credit (or increasing) amount.

The following information comes from the AIM program:

Type Code\Description: Unique code that identifies the ledger account and a description of the ledger account.

Agency ID\Name: Unique numeric code and name that identify the outside agency or attorney that holds the account.

Alpha Code: Alphanumeric code that identifies the outside agency or attorney that holds the account.

AIM Unique ID: Unique code that identifies the AIM transaction.

Created Date: Date the system or a user created the transaction in AIM.

AIM Invoice ID: Unique code that identifies the AIM invoice that included the transaction.

Acct Ledger ID: Unique code that identifies the accounting ledger associated to the transaction.

Approved Date: Date the transaction was approved.

Approved by: Person who approved the transaction.

Approved Amt: Transaction amount that was approved.

Related Topics
Accounting

Legal Case

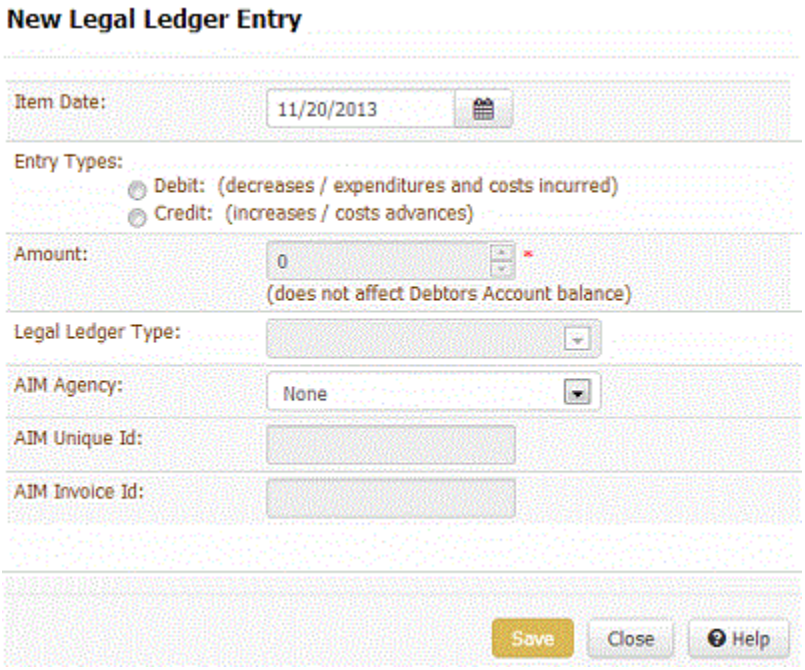
Feedback

Add a Legal Ledger Item

Use the **New Legal Ledger Entry** dialog box to add a legal ledger item for the account.

To add a legal ledger item

1. In the **Task Panel** navigation tree, click a case number.
2. Click the **Accounting** tab and then click **Add New**.



Item Date: Date the transaction occurred.

Entry Types: Indicates whether the ledger item is a debit or credit.

Amount: Debit or credit amount associated to the ledger item.

Legal Ledger Type: Type of ledger account.

AIM Agency: Name of the outside agency or attorney that holds the account.

AIM Unique ID: Unique code that identifies the AIM ledger item.

AIM Invoice ID: Unique code that identifies the AIM invoice that included the ledger item.

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

Related Topics

Accounting

Legal Case

Legal Ledger Types

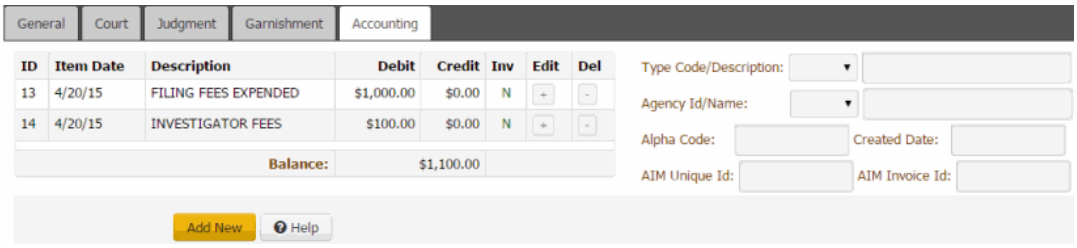
Feedback

Modify a Legal Ledger Item

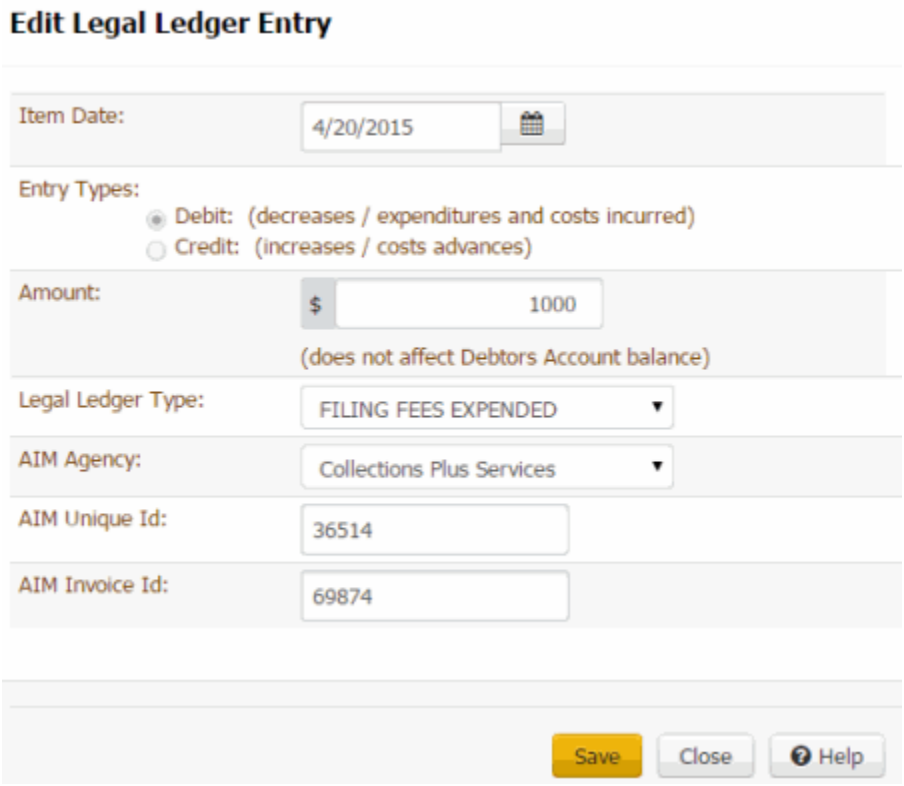
Use the **Edit Legal Ledger Entry** dialog box to modify a legal ledger item for the account.

To modify a legal ledger item

1. In the **Task Panel** navigation tree, click a case number.
2. Click the **Accounting** tab.



3. Click an item in the data grid and then, in the Edit column, click the plus sign (+).



Item Date: Date the transaction occurred.

Entry Types: Indicates whether the ledger item is a debit or credit. You cannot modify the entry type. You can, however, delete the item on the **Accounting** tab and add a new one.

Amount: Debit or credit amount associated to the ledger item.

Legal Ledger Type: Type of ledger account.

AIM Agency: Name of the outside agency or attorney that holds the account.

AIM Unique ID: Unique code that identifies the AIM ledger item.

AIM Invoice ID: Unique code that identifies the AIM invoice that included the ledger item.

4. Modify the information and then click **Save**.

Related Topics

Accounting

Legal Case

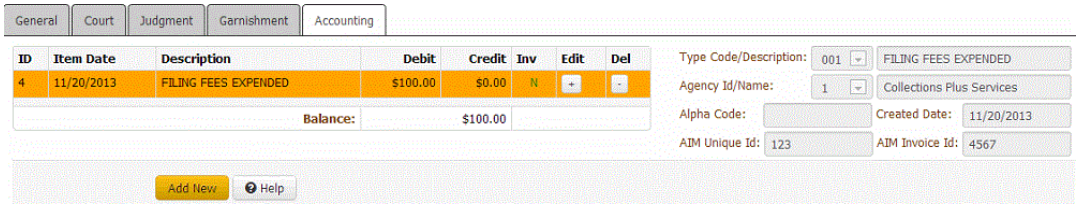
Feedback

Delete a Legal Ledger Item

Use the **Accounting** tab to delete a legal ledger item for the account.

To delete a legal ledger item

1. In the **Task Panel** navigation tree, click a case number.
2. Click the **Accounting** tab.



3. Click an item in the data grid and then, in the Del column, click the minus sign (-).
4. In the confirmation dialog box, click **OK**.

Related Topics

Accounting

Legal Case

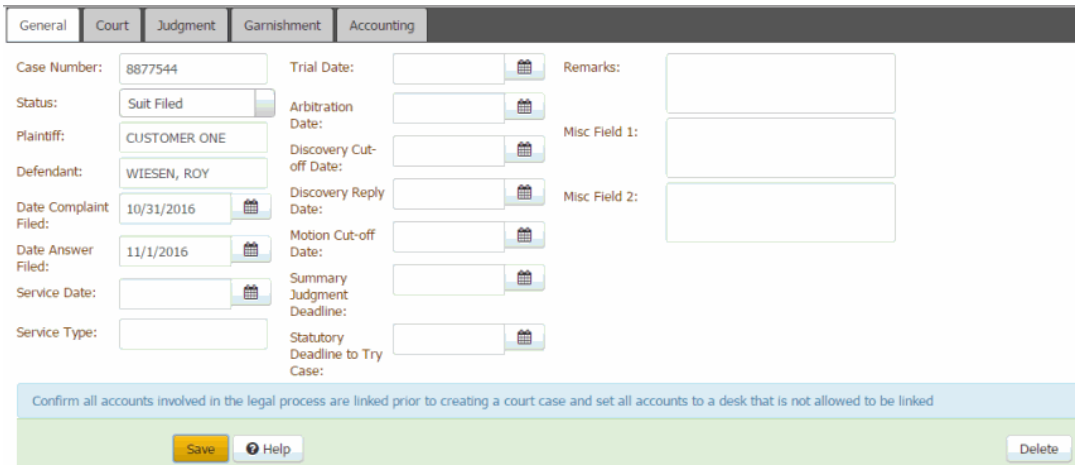
Feedback

Delete a Legal Case

Use the **General** tab to delete a legal case for the account. You cannot delete a legal case with an awarded judgment; however, you can reverse the judgment and then delete the legal case. To delete a legal case, you must have the Delete Legal Case permission.

To delete a legal case

1. In the **Task Panel** navigation tree, click the court case number. The **General** tab appears.



2. Click **Delete** and then, in the confirmation dialog box, click **OK**.

Related Topics

Legal Case

Legal Court Case Statuses

Care and Financial Hardship

Care and Financial Hardship

Use the **Care and Financial Hardship** panel to add or modify care or financial hardship cases for an account. You can add multiple cases; however, once you confirm a case, you cannot add more cases. You must have the Care and Financial Hardship Panel Permission.

Suspension of collection activity

Latitude places a hold on accounts with confirmed customer care or financial hardship to suspend all collection activity. When you close a care or financial hardship case and no others exist on the account, Latitude removes the account hold and collection activity resumes.

Related Topics

Add a Care or Financial Hardship Case

Modify a Care or Financial Hardship Case

Approve Care and Financial Hardship Hold Days

Care and Financial Hardship Panel Permission

Task Panels Permission

Task Panels

Feedback

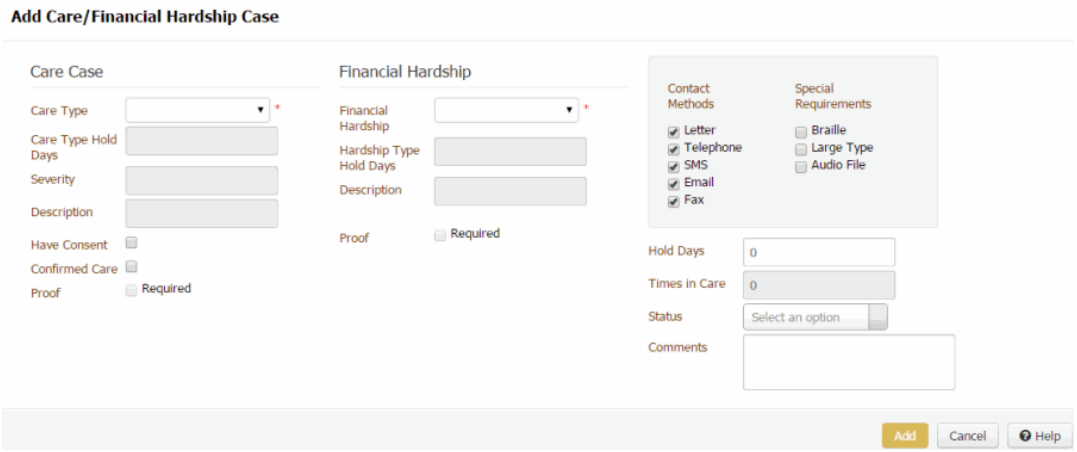
Add a Care or Financial Hardship Case

Use the **Add Care/Financial Hardship Case** dialog box to add a care or financial hardship case for the account.

To add a care or financial hardship case

1. In the **Task Panel** navigation tree, click **Care and Financial Hardship**.

2. Click **Add**.



Care Type: Type of care, such as long-term illness or literacy issues. If the **Have Consent** check box is selected, this list box contains all available care types. If the **Have Consent** check box is cleared, this list box contains only care types that don't require consent.

Note: The first time you add a care record to an account, this list box contains all available care types.

The following boxes appear when you select "prison" from the **Care Type** list box:

Prison Name: Name of the prison where the person is incarcerated.

Prison Number: Person's prison identification number.

Sentence Date: Person's sentencing date.

Release Date: Person's prison release date.

Prison Informant: Person or system that notified you of the person's imprisonment.

Care Type Hold Days: Number of days to place the account on hold to suspend collection activity. Latitude populates this box with the default value for the selected care type.

Severity: Level of severity (1-10) for the care type. Latitude populates this box based on the selected care type.

Description: Description of the care case. Latitude populates this box based on the selected care type.

Have Consent: If selected, you have consent from the customer to discuss the care case. If cleared, the system only displays care types that don't require consent.

Confirmed Care: If selected, you confirmed the care case. The system places a collection hold on the account and sets the expiration date based on the number of days set for the care type. You cannot add other care cases. If cleared, the system doesn't place a collection hold on the account.

Proof Required: If selected, your organization requires proof of the care issue and you cannot clear this check box.

Proof Requested: If selected, your organization requested proof of the care issue. If your organization configured the **Care Type** code to require proof, this check box appears.

Proof Received: If selected, your organization received proof of the care issue. If you select the **Proof Requested** check box, this check box appears.

Financial Hardship: Type of financial hardship, such as unemployment or illness.

Hardship Type Hold Days: Number of days to place the account on hold to suspend collection activity. Latitude populates this box with the default value for the selected financial hardship type.

Description: Description of the financial hardship. Latitude populates this box based on the selected financial hardship type.

Proof Required: If selected, your organization requires proof of the financial hardship and you cannot clear this check box.

Proof Requested: If selected, your organization requested proof of the financial hardship. If your organization configured the **Hardship Type** code to require proof, this check box appears.

Proof Received: If selected, your organization received proof of the financial hardship. If you select the **Proof Requested** check box, this check box appears.

Contact Methods: If selected, you can contact the customer using the specified contact method. Latitude requires you to select at least one contact method.

Special Requirements: If selected, the customer has a special-needs requirement for contact.

Hold Days: Number of days to place the account on hold to suspend collection activity. When you select the **Confirmed Care** check box, Latitude populates this box with the default value. If you have the appropriate permissions, you can override this value. Latitude uses the hold days value to calculate the hold release date. When the hold release date expires, Latitude removes the hold on the account.

Times in Care: Number of times the customer has been in care. Latitude sums the number of care records added for the customer to calculate this value.

Status: Status of the care or financial hardship case, such as proof confirmed or proof not required. If you select "closed," Latitude changes the closed date to the current date.

Comments: Notes regarding the care or financial hardship case.

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

Related Topics

Care and Financial Hardship

Care Types

Hardship Types

Feedback

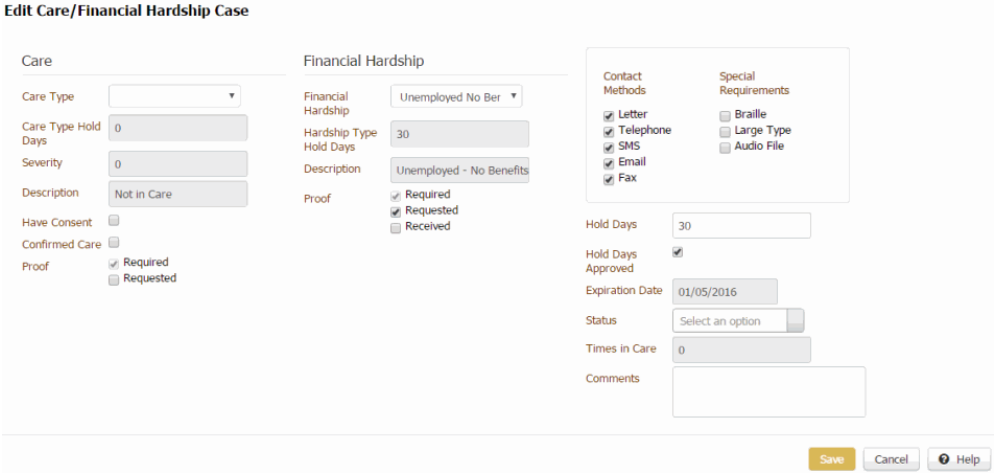
Modify a Care or Financial Hardship Case

Use the **Edit Care/Financial Hardship Case** dialog box to modify a care or financial hardship case for the account.

To modify a care or financial hardship case

1. In the **Task Panel** navigation tree, click **Care and Financial Hardship**.

2. In the data grid, click a case and then click **Edit**.



Care Type: Type of care, such as long-term illness or literacy issues. If you select the **Have Consent** check box, this list box contains all available care types. If you clear the **Have Consent** check box, this list box contains only the care types that don't require consent.

Care Type Hold Days: Number of days to place the account on hold to suspend collection activity. Latitude populates this box with the default value for the selected care type.

Severity: Level of severity (1-10) for the care type. Latitude populates this box based on the selected care type.

Description: Description of the care case. Latitude populates this box based on the selected care type.

Have Consent: If selected, you have consent from the customer to discuss care information. If cleared, the system only displays care types that don't require consent.

Confirmed Care: If selected, you confirmed that the account is in care. The system places a collection hold on the account and sets the expiration date based on the number of days set for the care type. You cannot add other care cases. If cleared, the system doesn't place a collection hold on the account.

Proof Required: If selected, your organization requires proof of the care issue and you cannot clear this check box.

Proof Requested: If selected, your organization requested proof of the care issue. If your organization configured the **Care Type** code to require proof, this check box appears.

Proof Received: If selected, your organization received proof of the care issue. If you select the **Proof Requested** check box, this check box appears.

Financial Hardship: Type of financial hardship, such as unemployment or illness.

Hardship Type Hold Days: Number of days to place the account on hold to suspend collection activity. Latitude populates this box with the default value for the selected financial hardship type.

Description: Description of the financial hardship. Latitude populates this box based on the selected financial hardship type.

Proof Required: If selected, your organization requires proof of the financial hardship and you cannot clear this check box.

Proof Requested: If selected, your organization requested proof of the financial hardship. If your organization configured the **Hardship Type** code to require proof, this check box appears.

Proof Received: If selected, your organization received proof of the financial hardship. If you select the **Proof Requested** check box, this check box appears.

Contact Methods: If selected, you can contact the customer using the specified contact method. Latitude requires you to select at least one contact method.

Special Requirements: If selected, the customer has a special-needs requirement for contact.

Hold Days: Number of days to place the account on hold to suspend collection activity. When you select the **Confirmed Care** check box, Latitude populates this box with the default value. If you have the appropriate permissions, you can override this value. Latitude uses the hold days value to calculate the hold release date. When the hold release date expires, Latitude removes the hold on the account.

Hold Days Approved: If selected, a supervisor approved the number of hold days. Latitude requires supervisor approval when the hold days are greater than 30. Supervisors can determine which accounts require approval using the "HoldDaysNeedApproval" condition in the Account Analysis query tool. For more information about Account Analysis, see "Account Analysis" in the *Latitude Console* documentation.

Expiration Date: Date the account hold expires and Latitude removes the hold on the account.

Status: Status of the care or financial hardship case, such as proof confirmed or proof not required. If you select "closed," Latitude changes the closed date to the current date.

Times in Care: Number of times the customer has been in care. Latitude sums the number of care records added for the customer to calculate this value.

Comments: Notes regarding the care or financial hardship case.

3. Modify the information and then click **Save**.

Related Topics

Care and Financial Hardship

Care Types

Hardship Types

Feedback

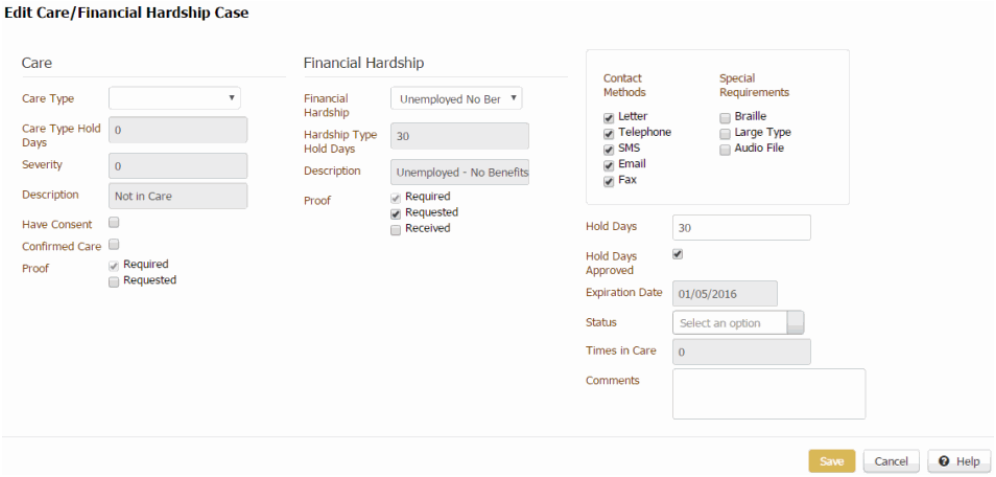
Approve Care and Financial Hardship Hold Days

Use the **Edit Care/Financial Hardship Case** dialog box to approve a customer care or financial hardship case with hold days that are greater than 30. Supervisors can determine which accounts require approval using the "HoldDaysNeedApproval" condition in the Account Analysis query tool or the WorkFlow Designer program. For more information about Account Analysis, see "Account Analysis" in the *Latitude Console* documentation. For more information about WorkFlow Designer, see the *WorkFlow Designer* documentation.

To approve care or financial hardship hold days

1. In the **Task Panel** navigation tree, click **Care and Financial Hardship**.

2. In the data grid, click a case and then click **Edit**.



3. Select **Hold Days Approved** and then click **Save**.

Related Topics

Care and Financial Hardship

Complaints

Feedback

Complaints

Use the **Complaints** panel to add, modify, close, and reopen complaints for an account. Users work complaints in order based on complaint type, days until Service Level Agreement (SLA) breach, client, debt type, owner, and priority. You must have the Complaints Panel Permission.

Suspension of collection activity

Latitude places a hold on accounts with complaints, which suspends all collection activity. When you close a complaint and no other active complaints exist on the account, Latitude removes the account hold and collection activity resumes.

Related Topics

Add a Complaint

Modify a Complaint

Select Accounts to Associate to the Complaint

Remove a Duplicate Complaint

Remove a Complaint From an Account

Remove a Non-Complaint Document

Close a Complaint

Reopen a Complaint

Complaints Panel Permission

Task Panels Permission

Task Panels

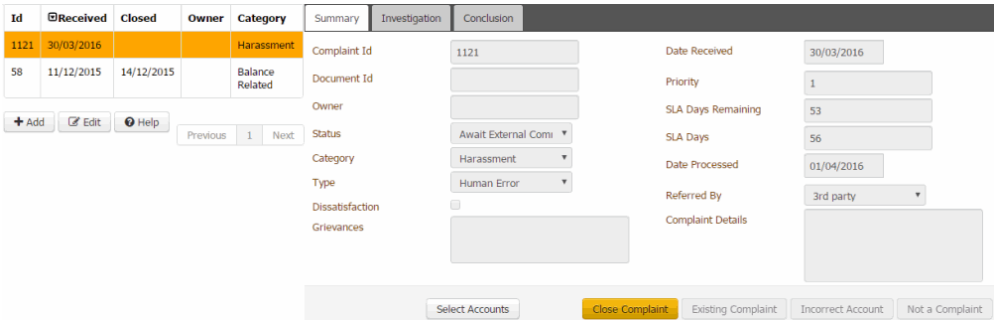
Feedback

Add a Complaint

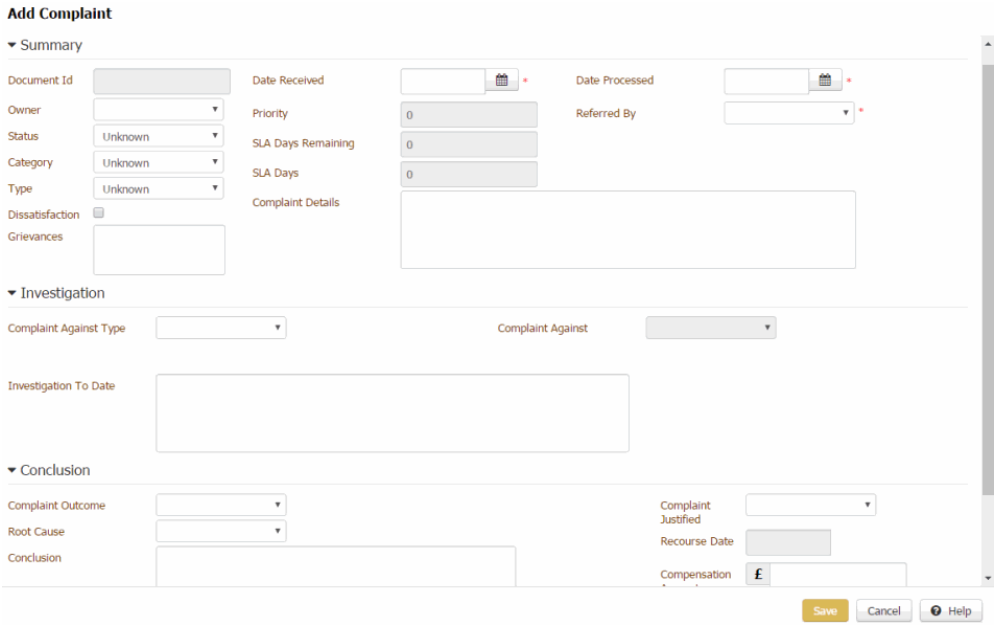
Use the **Add Complaint** dialog box to add a complaint for the account.

To add a complaint

1. In the **Task Panel** navigation tree, click **Complaints**.



2. Under the data grid, click **Add**.



Tip: To collapse or expand a section, click the section title.

Summary

Document ID: Code that identifies the document to associate to the complaint.

Owner: Complaint department staff assigned to the complaint.

Status: Status of the complaint.

Category: Complaint category, such as branch or department.

Type: Type of complaint, such as human or system error.

Dissatisfaction: If selected, the customer is dissatisfied.

Grievances: List of the customer's grievances.

Date Received: Date your organization received the complaint. If an inbound document generated the complaint, ECMS populates this date. Otherwise, you populate it.

Priority: Priority level that determines when the Complaint Department works the complaint. Latitude populates this box.

SLA Days Remaining: Number of days remaining until you breach the Service Level Agreement (SLA). Latitude subtracts the complaint received date from the current date to calculate this value.

SLA Days: Number of days after receiving the complaint that you have to resolve it before breaching the SLA. Latitude populates this box.

Complaint Details: Details regarding the complaint.

Date Processed: Date your organization processed the complaint.

Referred By: Person who referred the complaint, such as third party, client, or user.

Investigation

Complaint Against Type: Category for who or what the complaint is against, such as third party, branch, department, or user.

Investigation to Date: Information regarding the complaint investigation from the beginning to the current date.

Complaint Against: Who or what the complaint is against. The values available are based on the complaint type selected.

Conclusion

Complaint Outcome: Outcome of the complaint, such as training required or disciplinary action.

Root Cause: Root cause of the complaint.

Conclusion: Based on the investigation, the conclusion regarding the complaint.

Complaint Justified: Indicates whether the complaint is justified.

Recourse Date: Recourse approval date.

Compensation Amount: Amount of compensation the customer received.

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

Related Topics

Complaints

Complaint Categories

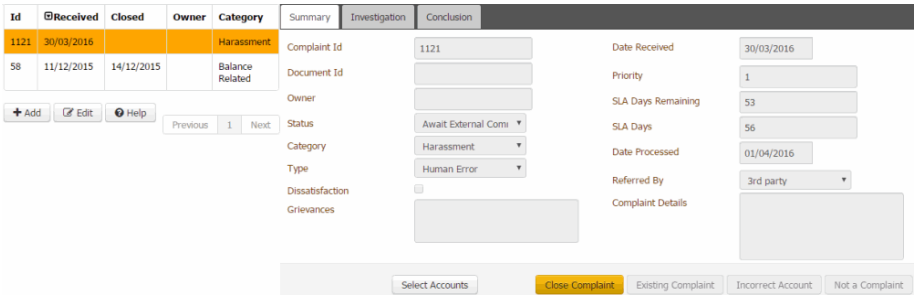
Feedback

Modify a Complaint

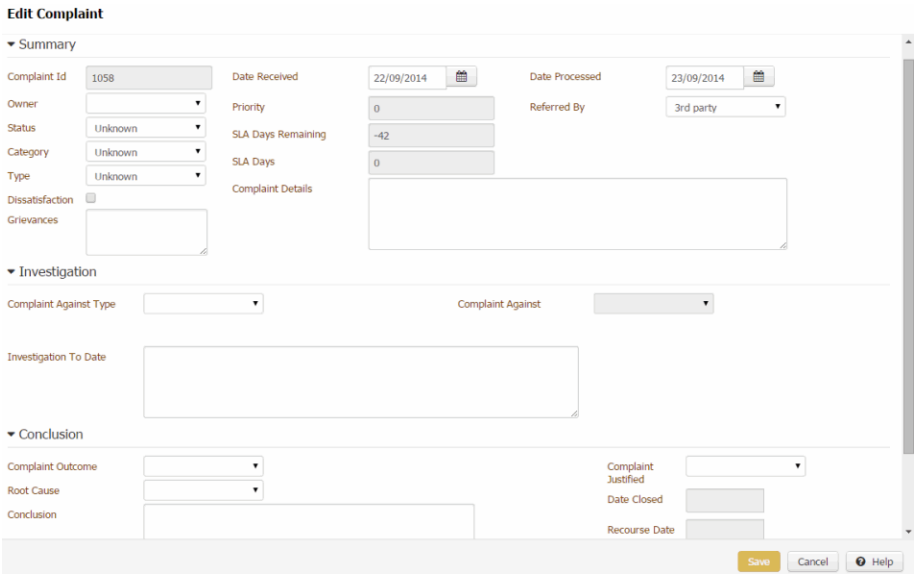
Use the **Edit Complaint** dialog box to modify a complaint for the account.

To modify a complaint

1. In the **Task Panel** navigation tree, click **Complaints**.



2. In the data grid, click the complaint and then click **Edit**.



Tip: To collapse or expand a section, click the section title.

Summary

Complaint ID: Unique code that Latitude assigns to identify the complaint.

Owner: Complaint Department staff assigned to the complaint.

Status: Status of the complaint.

Category: Complaint category, such as branch or department.

Type: Type of complaint, such as human or system error.

Dissatisfaction: If selected, the customer is dissatisfied.

Grievances: List of the customer's grievances.

Date Received: Complaint received date. If an inbound document generated the complaint, ECMS populates this date. Otherwise, you populate it.

Priority: Priority in which the Complaint Department works the complaint. Latitude populates this box.

SLA Days Remaining: Number of days remaining until you breach the Service Level Agreement (SLA). Latitude subtracts the complaint received date from the current date to calculate this value.

SLA Days: Number of days after receiving the complaint that you have to resolve it before breaching the SLA. Latitude populates this box.

Complaint Details: Details regarding the complaint.

Date Processed: Date your organization processed the complaint.

Referred By: Person who referred the complaint, such as third party, Capquest, client, or user.

Investigation

Complaint Against Type: Category for who or what the complaint is against, such as third party, branch, department, or user.

Investigation to Date: Information regarding the complaint investigation from the beginning to the current date.

Complaint Against: Who or what the complaint is against. The values available are based on the complaint type selected.

Conclusion

Complaint Outcome: Outcome of the complaint, such as training required or disciplinary action.

Root Cause: Root cause of the complaint.

Conclusion: Based on the investigation, the conclusion regarding the complaint.

Complaint Justified: Indicates whether the complaint is justified.

Date Closed: Complaint closed date. When you specify the complaint outcome. Latitude populates this box with the current date.

Recourse Date: Recourse approval date.

Compensation Amount: Amount of compensation the customer received.

3. Modify the information and then click **Save**.

Related Topics

Add a Complaint

Close a Complaint

Reopen a Complaint

Complaints

Complaint Categories

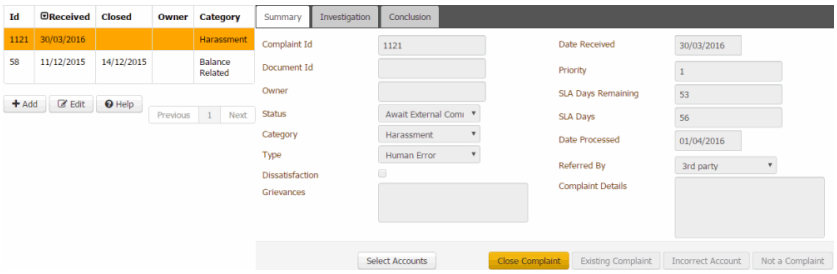
Feedback

Select Accounts to Associate to the Complaint

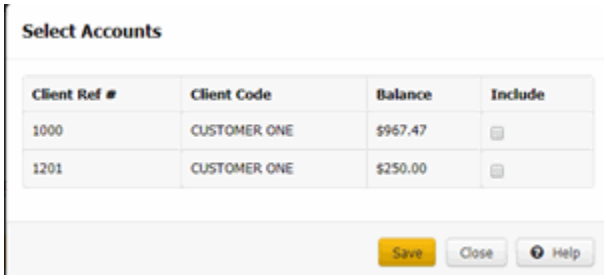
Use the **Complaints** panel to associate other accounts to the complaint. Only linked accounts are available for selection. You can view the complaint from any account associated to it.

To select accounts to associate to the complaint

1. In the **Task Panel** navigation tree, click **Complaints**.



2. In the data grid, click the complaint to associate accounts to and then click **Select Accounts**.



3. Select one or more accounts to associate and then click **Save**.

Related Topics

Complaints

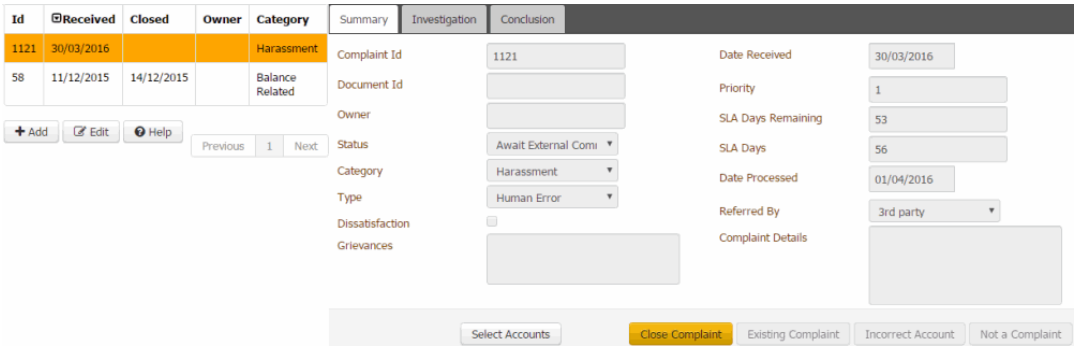
Feedback

Remove a Duplicate Complaint

Use the **Complaints** panel to remove a duplicate complaint for the account. Duplicates occur when ECMS uploads a new complaint document, which creates a complaint, and the document relates to an existing complaint on the account.

To remove a duplicate complaint

1. In the **Task Panel** navigation tree, click **Complaints**.



2. In the data grid, click the duplicate complaint to remove and then click **Existing Complaint**. Latitude removes the complaint.

Related Topics

Complaints

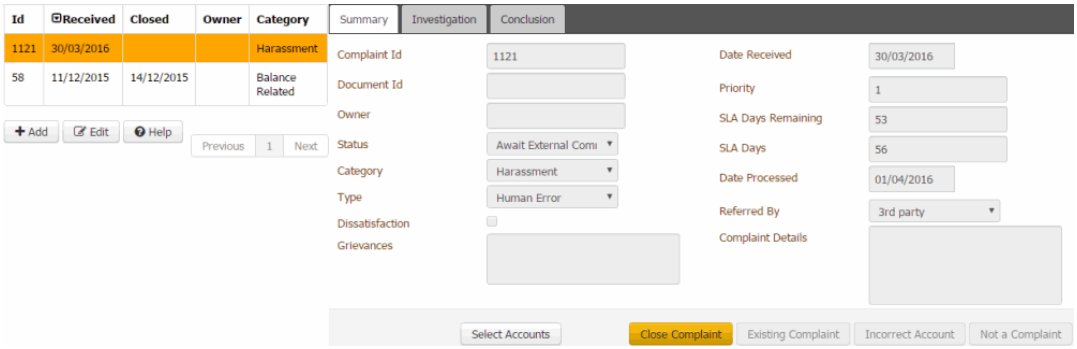
Feedback

Remove a Complaint From an Account

Use the **Complaints** panel to remove a complaint from the account.

To remove a complaint

1. In the **Task Panel** navigation tree, click **Complaints**.



2. In the data grid, click the complaint to remove and then click **Incorrect Account**. Latitude removes the complaint from the account.

Related Topics

Complaints

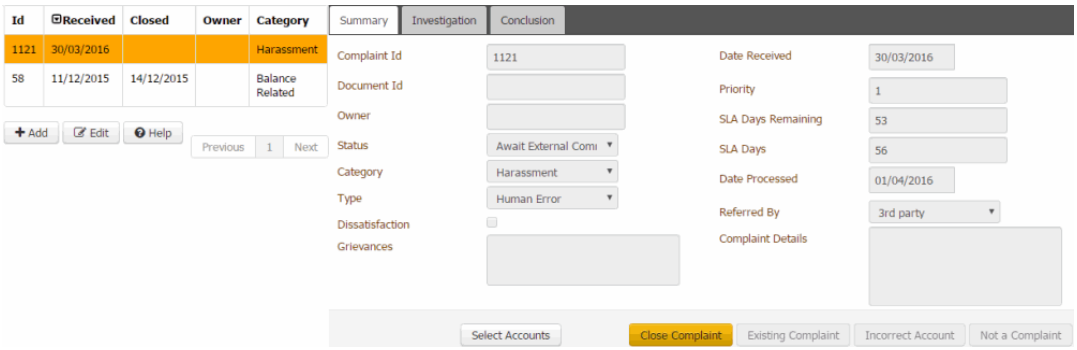
Feedback

Remove a Non-Complaint Document

Use the **Complaints** panel to remove a document that isn't a complaint document from the account.

To remove a non-complaint document

1. In the **Task Panel** navigation tree, click **Complaints**.



2. In the data grid, click the complaint to remove and then click **Not a Complaint**. Latitude removes the complaint from the account and sends a message to ECMS that includes the document ID that created the complaint.

Related Topics

Complaints

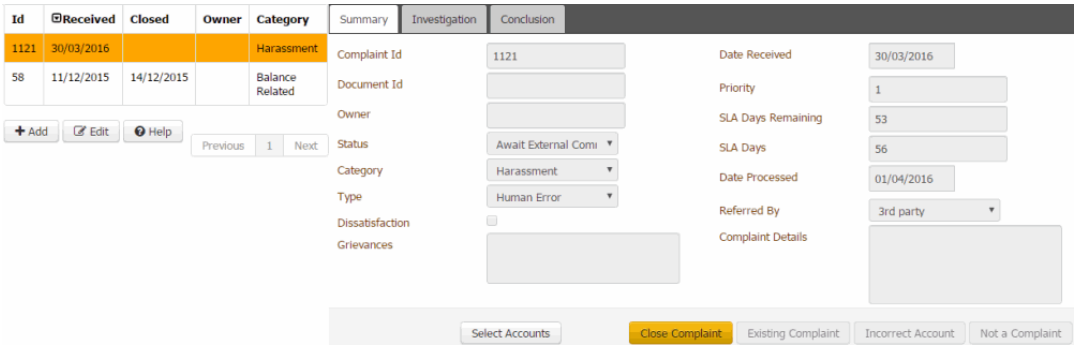
Feedback

Close a Complaint

Use the **Complaints** panel to close a complaint for the account. If you specify a complaint outcome. Latitude closes the complaint automatically.

To close a complaint

1. In the **Task Panel** navigation tree, click **Complaints**.



2. In the data grid, click the complaint to close and then click **Close Complaint**. If you didn't specify an outcome, an error message appears. Close the dialog box, specify an outcome, and then click **Close Complaint**.

Related Topics

Complaints

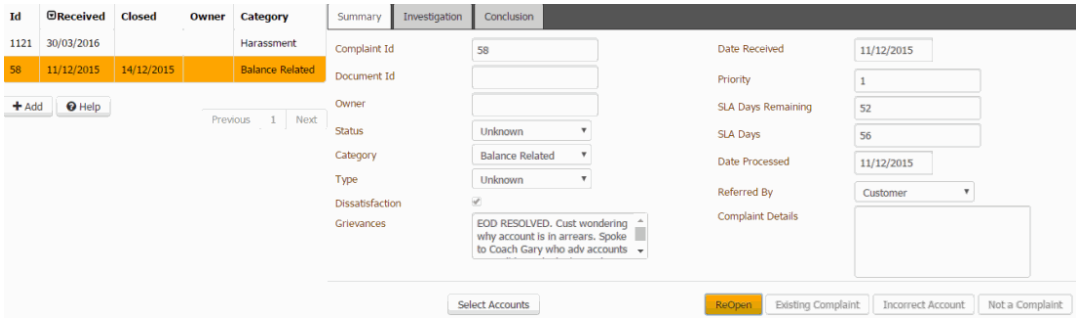
Feedback

Reopen a Complaint

Use the **Complaints** panel to reopen a closed complaint for the account.

To reopen a complaint

1. In the **Task Panel** navigation tree, click **Complaints**.



2. In the data grid, click the closed complaint to reopen and then click **ReOpen**.

Related Topics

Complaints

Disputes

Disputes

Use the **Disputes** panel to add, modify, and complete debt disputes for accounts. An account can have multiple disputes, including concurrent active ones. You or the system can move disputed accounts to a pending dispute work queue for further processing. You must have the Disputes Panel Permission.

Suspension of collection activity

Latitude places a hold on accounts in dispute to suspend all collection activity. When you close a dispute and no other active disputes exist on the account, Latitude removes the account hold and collection activity resumes.

Suspension of interest calculation

Latitude suspends interest calculation for disputed accounts with interest charges on their account balances. When you close a dispute and no other active disputes exist on the account, Latitude resumes interest calculations.

Related Topics

Add a Dispute

Modify a Dispute

Remove a Duplicate Dispute

Remove a Non-Dispute Document

Close a Dispute

Reopen a Dispute

Disputes Panel Permission

Task Panels Permission

Task Panels

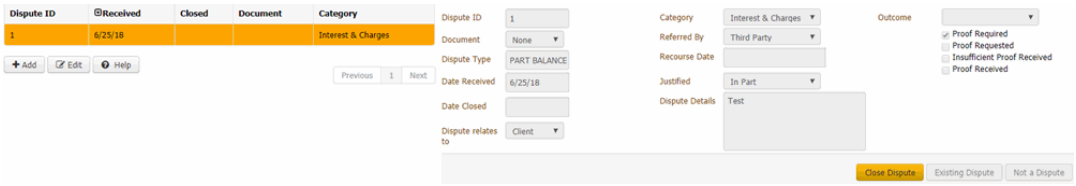
Feedback

Add a Dispute

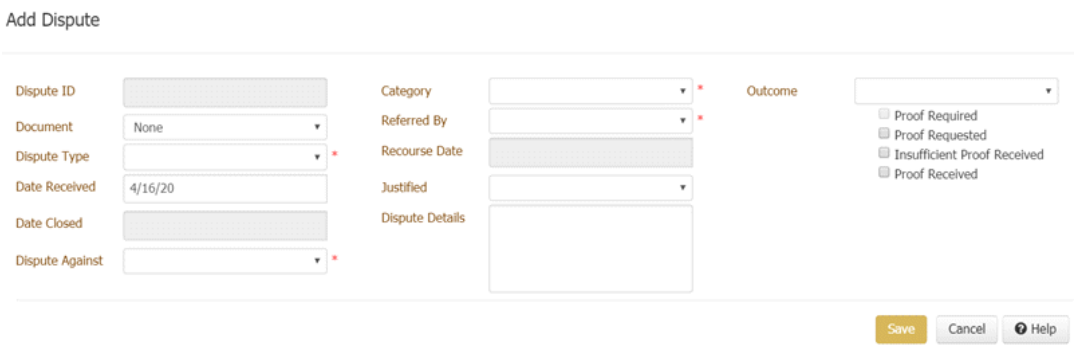
Use the **Add Dispute** dialog box to add a dispute for the account.

To add a dispute

1. In the **Task Panel** navigation tree, click **Disputes**.



2. Click **Add**.



Dispute ID: Unique code that Latitude assigns to identify the dispute.

Document: Unique code that identifies the document associated to the dispute.

Dispute Type: Type of dispute, such as possible fraud or incorrect trace.

Date Received: Dispute received date.

Date Closed: Dispute closed date. When you close the dispute. Latitude populates this box with the current date.

Dispute Against: Person that the dispute is against, such as client or third party.

Category: Dispute category, such as fraud or wrong trace.

Referred By: Person who referred the dispute, such as a third party or the client.

Recourse Date: Recourse approval date.

Justified: Indicates whether the dispute is justified.

Dispute Details: Details regarding the dispute.

Outcome: Outcome of the dispute, such as account on hold or unable to resolve.

Proof Required: If selected, your organization requires proof of the dispute.

Proof Requested: If selected, your organization requested proof of the dispute.

Insufficient Proof Received: If selected, your organization received proof that is insufficient.

Proof Received: If selected, your organization received proof of the dispute.

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

Related Topics

Disputes

Dispute Types

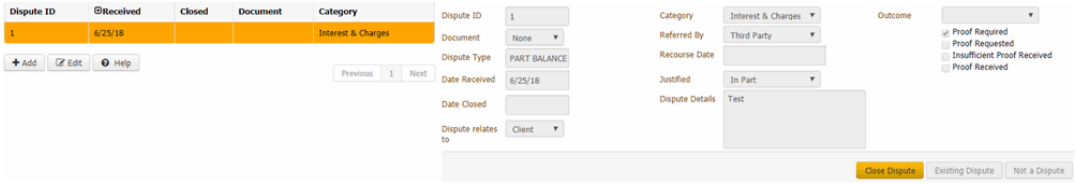
Feedback

Modify a Dispute

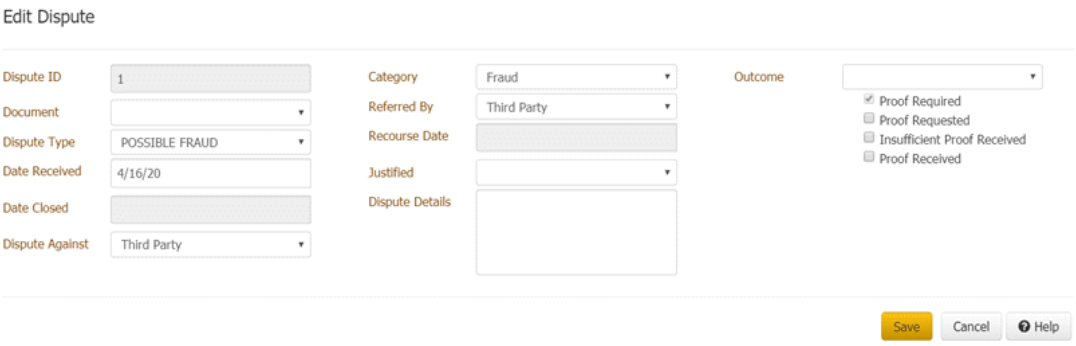
Use the **Edit Dispute** dialog box to modify a dispute for the account.

To modify a dispute

1. In the **Task Panel** navigation tree, click **Disputes**.



2. In the data grid, click the dispute and then click **Edit**.



Dispute ID: Unique code that Latitude assigns to identify the dispute.

Document: Unique code that identifies the document associated to the dispute.

Dispute Type: Type of dispute, such as possible fraud or incorrect trace.

Date Received: Dispute received date.

Date Closed: Dispute closed date. When you close the dispute. Latitude populates this box with the current date.

Dispute Against: Person that the dispute is against, such as client or third party.

Category: Dispute category, such as fraud or wrong trace.

Referred By: Person who referred the dispute, such as third party, client, or user.

Recourse Date: Recourse approval date.

Justified: Indicates whether the dispute is justified.

Dispute Details: Details regarding the dispute.

Outcome: Outcome of the dispute, such as account on hold or unable to resolve.

Proof Required: If selected, your organization requires proof of the dispute.

Proof Requested: If selected, your organization requested proof of the dispute.

Insufficient Proof Received: If selected, your organization received proof that is insufficient.

Proof Received: If selected, your organization received proof of the dispute.

3. Modify the information and then click **Save**.

Related Topics

Disputes

Dispute Types

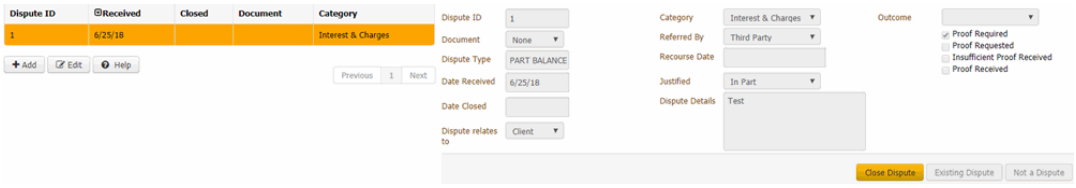
Feedback

Remove a Duplicate Dispute

Use the **Disputes** panel to remove a duplicate dispute for the account.

To remove a duplicate dispute

1. In the **Task Panel** navigation tree, click **Disputes**.



2. In the data grid, click the duplicate dispute to remove and then click **Existing Dispute**. Latitude removes the dispute.

Related Topics

Disputes

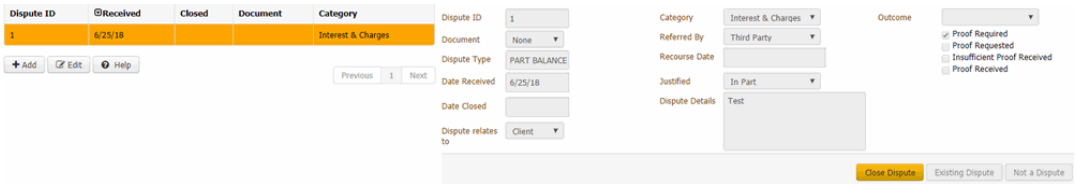
Feedback

Remove a Non-Dispute Document

Use the **Disputes** panel to remove a document that isn't a dispute document from the account.

To remove a non-dispute document

1. In the **Task Panel** navigation tree, click **Disputes**.



2. In the data grid, click the dispute to remove and then click **Not a Dispute**. Latitude removes the dispute from the account.

Related Topics

Disputes

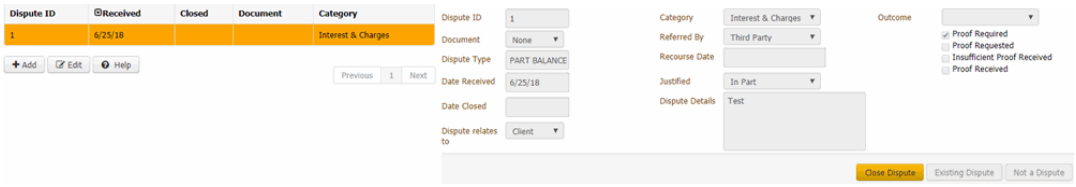
Feedback

Close a Dispute

Use the **Disputes** panel to close a dispute for the account.

To close a dispute

1. In the **Task Panel** navigation tree, click **Disputes**.



2. In the data grid, click the dispute to close and then click **Close Dispute**.

Related Topics

Disputes

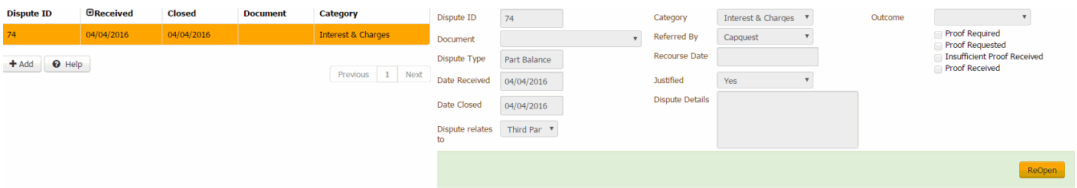
Feedback

Reopen a Dispute

Use the **Disputes** panel to reopen a closed dispute for the account.

To reopen a dispute

1. In the **Task Panel** navigation tree, click **Disputes**.



2. In the data grid, click the closed dispute to reopen and then click **Reopen**.

Related Topics

Disputes

RDN Integration

Feedback

RDN Integration

Use the **RDN Integration** panel to create and update vehicle recovery cases for the account. This panel integrates with the Recovery Database Network (RDN) system to allow the exchange of recovery data.

After you create a case and assign it to a recovery agency, a recovery agent begins the process of locating and repossessing the piece of collateral. During the process, the agent updates their progress in the RDN system. Latitude retrieves the updates from the RDN system when you choose the update option in Latitude. If your organization created a job in Job Manager to retrieve updates, Job Manager retrieves updates for all RDN cases for all Latitude accounts during the scheduled job run and posts the updates to Latitude.

Related Topics

View Summary Data for an RDN Case

View RDN Case Detail and Update History

Create an RDN Case

Modify Addresses and Phone Numbers on an RDN Case

Retrieve Case Updates From RDN

Send a Case Update to RDN

Case Updates

Place an RDN Case on Hold

Release the Hold on an RDN Case

Close and Reassign an RDN Case

Close an RDN Case

Allow RDN Case Creation and Updates Permission

Task Panels Permission

Task Panels

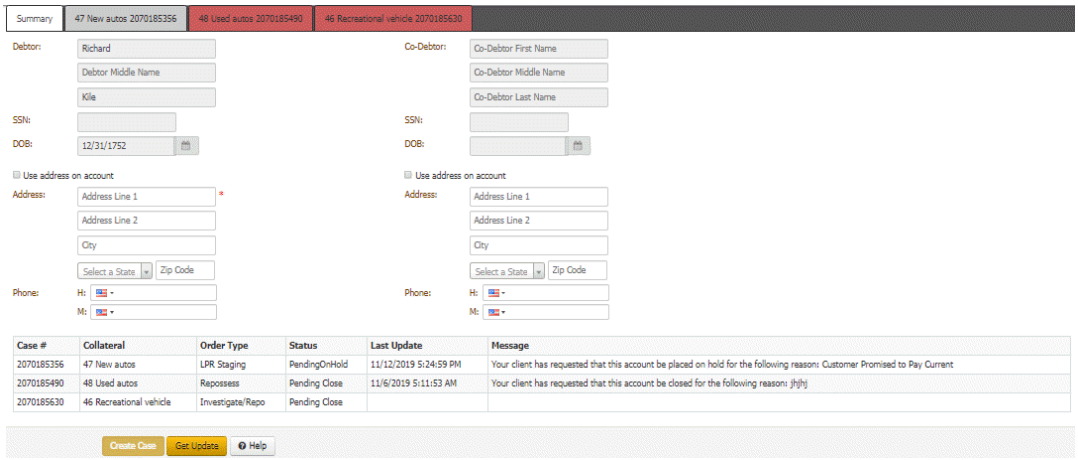
Feedback

View Summary Data for an RDN Case

Use the **RDN Integration** panel to view summary data for an RDN case.

To view summary data for an RDN case

- In the **Task Panel** navigation tree, click **RDN Integration** and then click the **Summary** tab.



Debtor: Debtor's first name, middle name, and last name.

SSN: Debtor's Social Security Number.

DOB: Debtor's date of birth.

Use address on account: If selected, Latitude populates the address boxes with the default address on the account and makes the address boxes unavailable for edit.

Address: Debtor's street address, city, state, and postal code. If you selected the **Use address on account** check box, you cannot modify the address unless you clear the check box. Changes to the address on this tab does not change the address on the account.

Phone: Debtor's home and mobile phone numbers.

Co-Debtor: Co-debtor's first name, middle name, and last name.

SSN: Co-debtor's Social Security Number.

DOB: Co-debtor's date of birth.

Use address on account: If selected, Latitude populates the address boxes with the default address on the account and changes the address boxes to unavailable for edit.

Address: Co-debtor's street address, city, state, and postal code. If you selected the **Use address on account** check box, you cannot modify the address unless you clear the check box. Changes to the address on this tab does not change the address on the account.

Phone: Co-debtor's home and mobile phone numbers.

If there are open RDN cases for the account, the following data appears in a data grid.

Case #: Number that the RDN system assigned to identify the case.

Collateral: Name of the collateral item.

Order Type: Type of recovery order.

Status: Status of the recovery order.

Last Update: Date that the case was updated in the RDN system.

Message: Details about the RDN case update.

Related Topics

RDN Integration

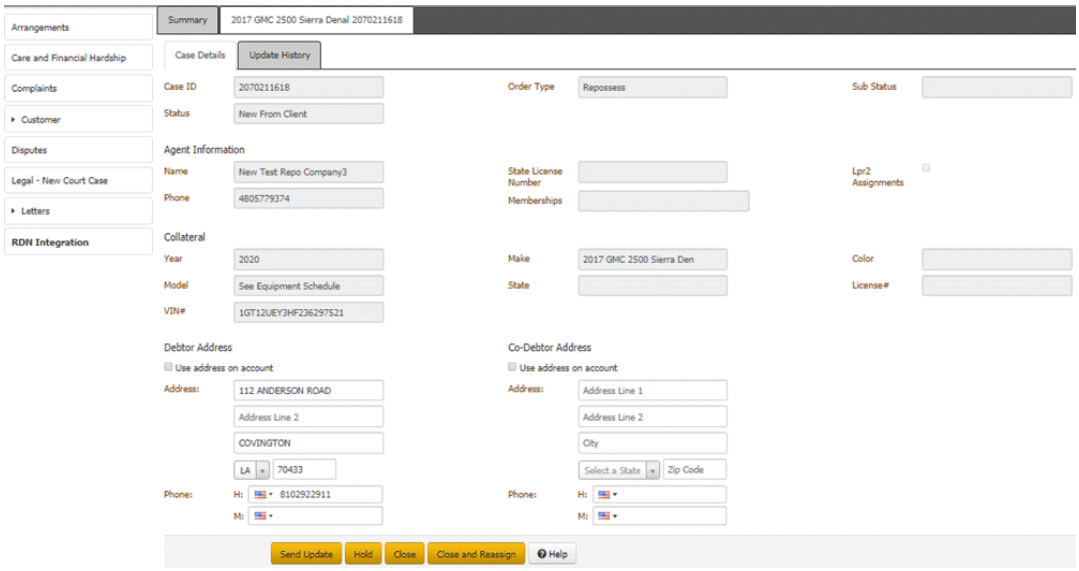
Feedback

View RDN Case Detail and Update History

Use the **Case Details** and **Update History** tabs on the **RDN Integration** panel to view details and update history for an RDN case.

To view RDN case detail and update history

1. In the **Task Panel** navigation tree, click **RDN Integration**, click the tab for the case to view, and then click the **Case Details** tab.



Case ID: Number that the RDN system assigned to identify the case.

Status: Status of the recovery order.

Order Type: Type of recovery order.

Sub Status: Secondary status of the order.

Agent Information

Name: Name of the repossession agent.

Phone: Repossession agent's phone number.

State License Number: Repossession agent's state license number.

Memberships: Associations for which the repossession agent has a membership.

Lpr2 Assignments: If selected, the agency is only used for LPR assignments.

Collateral

Year: Vehicle model year.

Model: Vehicle model.

VIN: Vehicle Identification Number.

Make: Vehicle manufacturer.

State: State where the vehicle is licensed.

Color: Color of the vehicle.

License #: Vehicle's license plate number.

Debtor Address

Use Address on Account: If selected, uses the address on the account, instead of the one specified on this tab.

Address: Debtor's street address line 1, street address line 2, city, state, and postal code.

Phone: Debtor's home and mobile phone numbers.

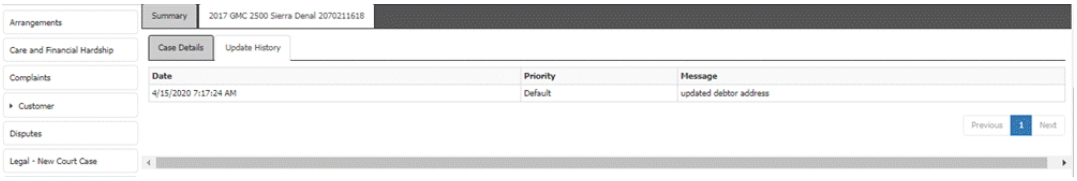
Co-Debtor Address

Use Address on Account: If selected, uses the address on the account, instead of the one specified on this tab.

Address: Co-debtor's street address line 1, street address line 2, city, state, and postal code.

Phone: Co-debtor's home and mobile phone numbers.

2. Click the **Update History** tab.



Date: Date that the case was updated in the RDN system.

Priority: RDN case update priority.

Message: Details about the RDN case update.

Related Topics

RDN Integration

Modify Addresses and Phone Numbers on an RDN Case

Send a Case Update to RDN

Place an RDN Case on Hold

Release the Hold on an RDN Case

Close and Reassign an RDN Case

Close an RDN Case

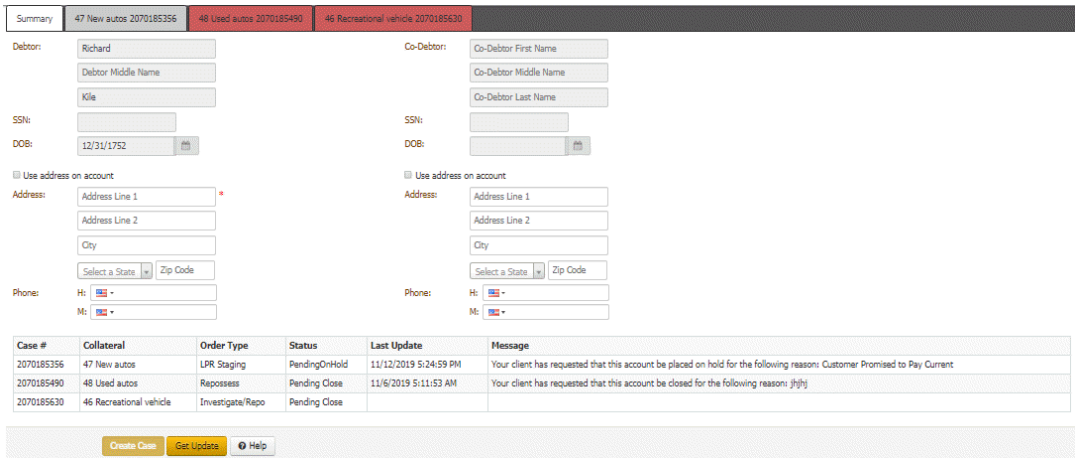
Feedback

Create an RDN Case

Use the **Create Case** dialog box to create an RDN repossession case for a piece of collateral for which there is no case currently. You can only create one case for each piece of collateral. If all pieces of collateral have a case, the option to create a case is not available. You must have the Allow RDN Case Creation and Updates Permission.

To create an RDN case

1. In the **Task Panel** navigation tree, click **RDN Integration**.



Latitude populates the debtor and, if applicable, co-debtor boxes.

2. Modify the debtor and co-debtor information as necessary. Latitude does not change the debtor and co-debtor information on the account. The changes on this tab are for the RDN system only.

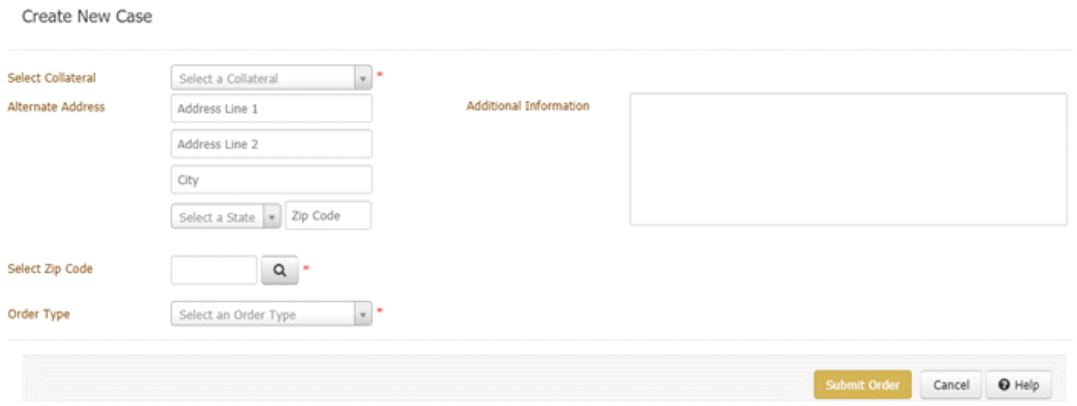
3. Do one of the following:

   - To use the address on the account, select the **Use address on account** check box. Latitude populates the address boxes with the default address on the account and makes the address boxes unavailable for edit.

   - To specify an address other than the one on the account, clear the **Use address on account** check box and then complete the address boxes. Latitude does not change the address on the account. The changes on this tab are for the RDN system only.

4. To specify phone numbers, complete the phone number boxes.

5. Click **Create Case**.



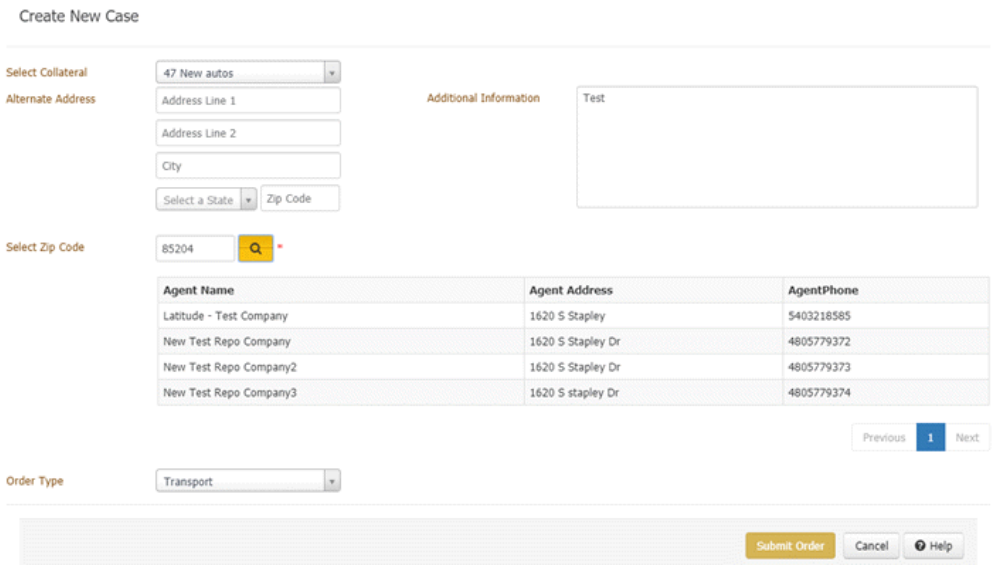
6. In the **Select Collateral** list box, click the piece of collateral to assign to the case. The list only contains collateral that isn't associated to a case currently.

7. (Optional) In the **Alternate Address** boxes, specify an alternate address where the recovery agent might find the piece of collateral. Or, you can specify the agent's business address.

8. (Optional) In the **Additional Information**, type other information regarding the case.

9. Do the following:

   a. In the **Select Zip Code** box, type the ZIP code in which to search for a recovery agency and then click the Search icon. The agencies located in that ZIP code appear in the data grid.



b. In the data grid, click the agency to assign to the case.

10. In the **Order Type** list box, click the type of order requested, such as vehicle transport or repossession.

11. Click **Submit Order**. Latitude sends the recovery order to the RDN system. If sent successfully, RDN sends the case information to the agent and Latitude adds a tab to the **RDN Integration** panel for the case.

Related Topics

RDN Integration

Allow RDN Case Creation and Updates Permission

Task Panels Permission

Task Panels

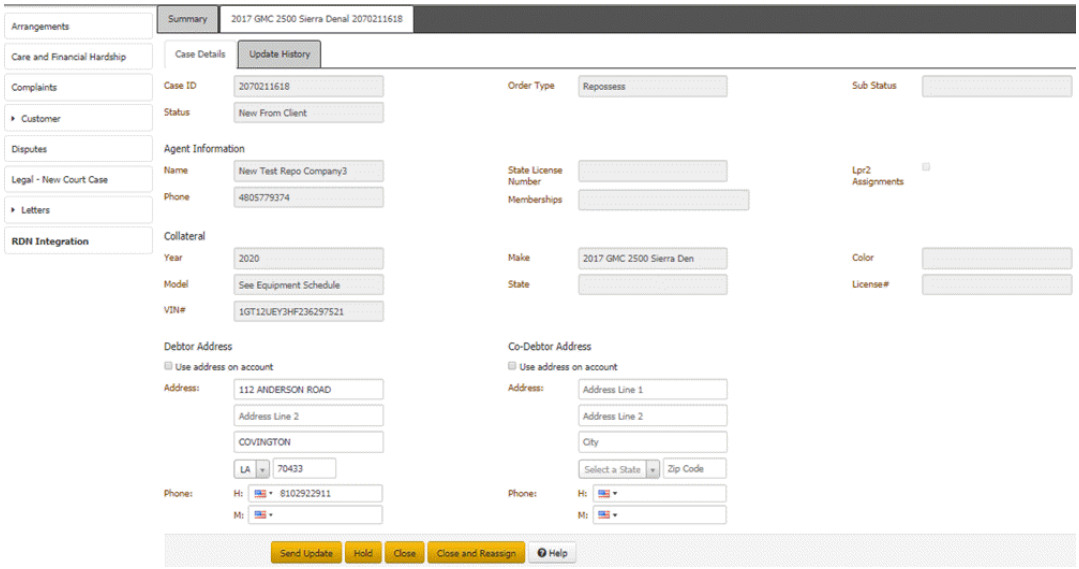
Feedback

Modify Addresses and Phone Numbers on an RDN Case

Use the **Case Details** tab on the **RDN Integration** panel to modify debtor and co-debtor addresses and phone numbers on an RDN case.

To modify addresses and phone numbers on an RDN case

1. In the **Task Panel** navigation tree, click **RDN Integration**, click the tab for the case to modify, and then click the **Case Details** tab.



Debtor Address

Use Address on Account: If selected, uses the address on the account, instead of the one specified on this tab.

Address: Debtor's street address line 1, street address line 2, city, state, and postal code.

Phone: Debtor's home and mobile phone numbers.

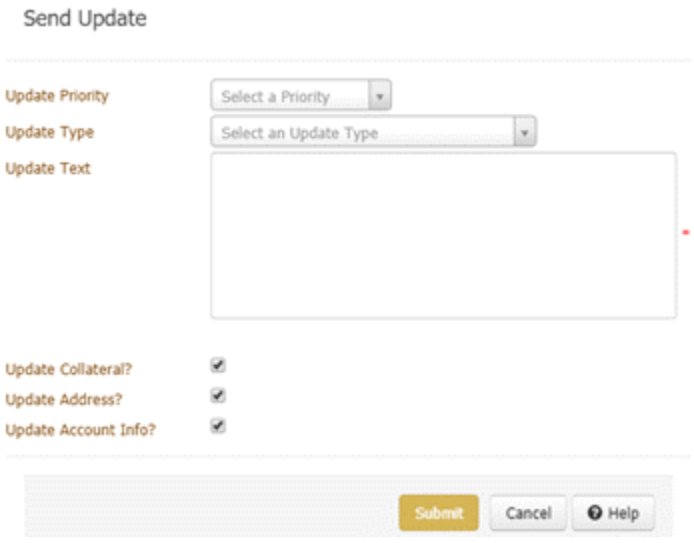
Co-Debtor Address

Use Address on Account: If selected, uses the address on the account, instead of the one specified on this tab.

Address: Co-debtor's street address line 1, street address line 2, city, state, and postal code.

Phone: Co-debtor's home and mobile phone numbers.

2. Modify the addresses and phone numbers as necessary and then click **Send Update**.



Update Priority: Urgency of the update for the recovery agent or agency.

Update Type: Type of update to send to RDN, such as account closed or address update.

Update Text: More information about the update.

Update Collateral?: If selected, you want to send collateral changes in Latitude to the RDN system. For more information about what data Latitude includes, see Case Updates.

Update Address?: If selected, you want to send address changes in Latitude to the RDN system.

Update Account Info?: If selected, you want to send account information changes in Latitude to the RDN system.

Note: Latitude doesn't update the RDN system automatically when you update collateral, address, or account information in Latitude. You must send an update to the RDN system.

3. Complete the information and ensure that you select the **Update Address?** check box.
4. click **Submit**. Latitude sends the updates to the RDN system and displays a message indicating such.
5. Click **Close**. Latitude adds a message to the **Recent Updates** data grid on the **Case Details** tab. Latitude also adds a row to the data grid on the **Summary** tab and includes a message about the update.

Related Topics

RDN Integration

View RDN Case Detail and Update History

Send a Case Update to RDN

Place an RDN Case on Hold

Release the Hold on an RDN Case

Close and Reassign an RDN Case

Close an RDN Case

Feedback

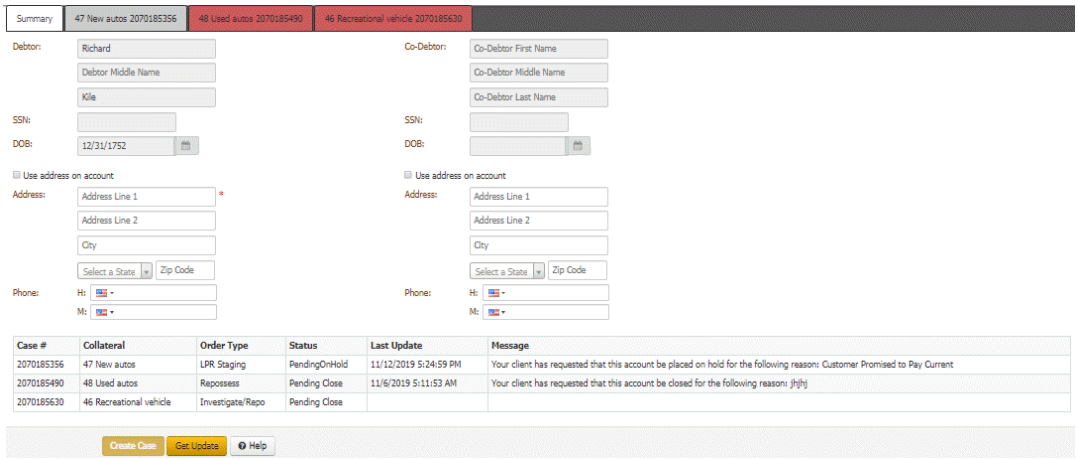
Retrieve Case Updates From RDN

Use the **Get Update** option to retrieve status updates from the RDN system in real time for all the cases on the account. You must have the Allow RDN Case Creation and Updates Permission.

Note: If your organization created a job in Job Manager to retrieve status updates, Job Manager retrieves updates for all RDN cases for all Latitude accounts when the scheduled job runs.

To retrieve case updates from RDN

1. In the **Task Panel** navigation tree, click **RDN Integration**.



2. Click **Get Update**. Latitude retrieves the latest case status for each open case on the account from the RDN system and displays a message indicating such.

3. Click **Close**.

Related Topics

RDN Integration

Send a Case Update to RDN

Allow RDN Case Creation and Updates Permission

Task Panels Permission

Task Panels

Feedback

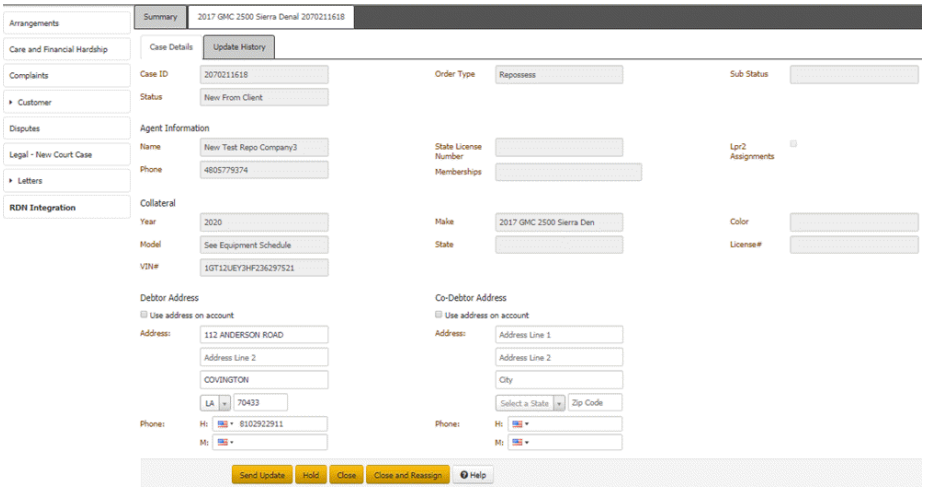
Send a Case Update to RDN

Use the **Send Update** option to send updates from Latitude to the RDN system in real time for a specific case on the account.

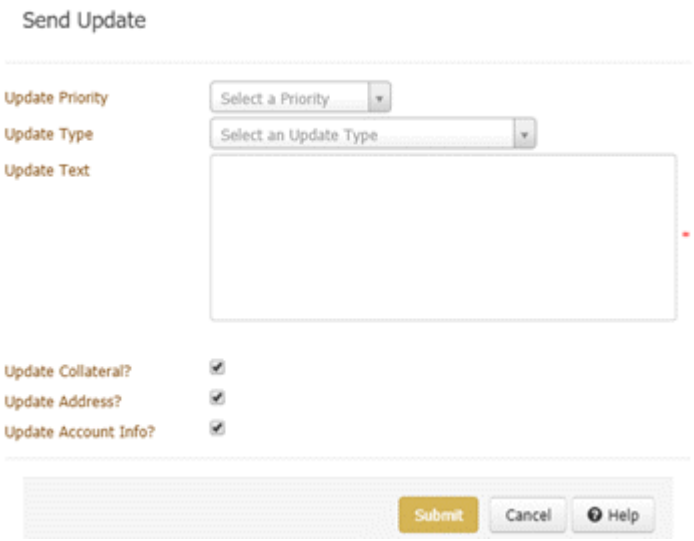
Note: You can only send updates for cases that aren't on hold or closed.

To send a case update to RDN

1. In the **Task Panel** navigation tree, click **RDN Integration** and then click the tab for the case for which to send an update.



2. Click **Send Update**.



Update Priority: Urgency of the update for the recovery agent or agency.

Update Type: Type of update to send to RDN, such as account closed or address update.

Update Text: More information about the update.

Update Collateral: If selected, you want to send collateral changes in Latitude to the RDN system. For more information about what data Latitude includes, see Case Updates.

Update Address: If selected, you want to send address changes in Latitude to the RDN system.

Update Account Info: If selected, you want to send account information changes in Latitude to the RDN system.

Note: Latitude doesn't update the RDN system automatically when you update collateral, address, or account information in Latitude. You must send an update to the RDN system.

3. Complete the information and then click **Submit**. Latitude sends the updates to the RDN system and displays a message indicating such.

4. Click **Close**. Latitude adds a message to the **Recent Updates** data grid on the **Case Details** tab. Latitude also adds a row to the data grid on the **Summary** tab and includes a message about the update.

Related Topics

RDN Integration

Case Updates

Retrieve Case Updates From RDN

Task Panels Permission

Task Panels

Feedback

Case Updates

If you select the **Update Collateral** check box in the **Send Update** dialog box, Latitude includes the following data when sending updates to the RDN system.

Collateral

- VIN
- Year
- Make
- Model
- Vehicle Color
- Vehicle License Number
- Vehicle License State
- Vehicle License Expiry
- Key Code 1
- Key Code 2
- Mileage

Account Info

- Amount Past Due
- Monthly Payments
- Balance on Account
- Delinquent Since
- Charge Off Date
- Bankruptcy Type

Address

- Address ID
- Address
- Address Type
- City
- State
- ZIP code
- Phones

Related Topics

RDN Integration

Send a Case Update to RDN

Task Panels Permission

Task Panels

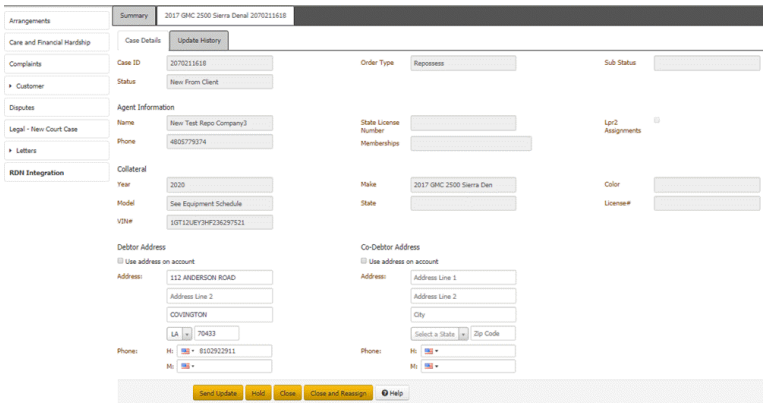
Feedback

Place an RDN Case on Hold

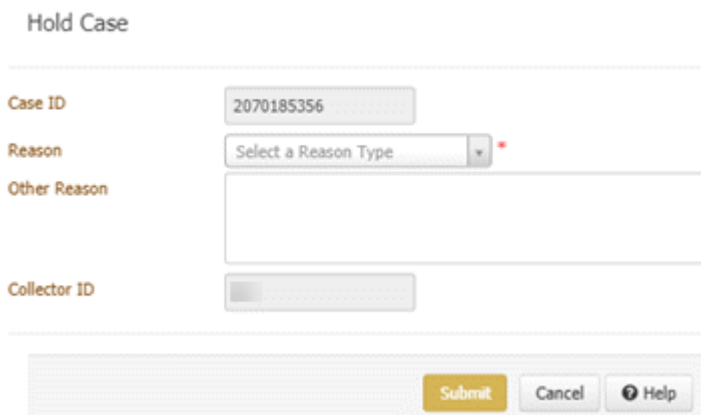
Use the **RDN Integration** panel to place an RDN case on hold to stop the recovery process temporarily. For example, you can place a case on hold while you investigate a customer's complaint.

To place an RDN case on hold

1. In the **Task Panel** navigation tree, click **RDN Integration** and then click the tab for the case to put on hold.



2. Click **Hold**.



Case ID: Number that the RDN system assigned to identify the case.

Reason: Reason for placing the case on hold.

Other Reason: Comments regarding the reason for placing the case on hold.

Collector ID: Code that identifies the user who's placing the case on hold.

3. Complete the information and then click **Submit**. Latitude sends the hold request to the RDN system. If sent successfully, the RDN system notifies the agent to stop the recovery process. Latitude places the case on hold and displays a message indicating such.

4. Click **Close**. Latitude adds a message to the **Recent Updates** data grid on the **Case Details** tab. Latitude also adds a row to the data grid on the **Summary** tab and includes a message about the hold.

Related Topics

RDN Integration

Release the Hold on an RDN Case

Allow RDN Case Creation and Updates Permission

Task Panels Permission

Task Panels

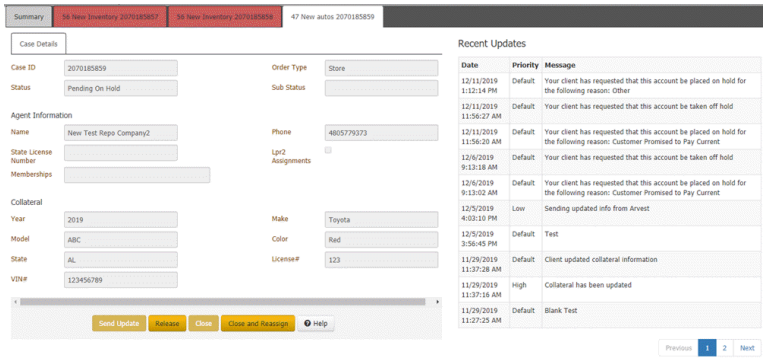
Feedback

Release the Hold on an RDN Case

Use the **RDN Integration** panel to release the hold on an RDN case after resolving the hold reason.

To release the hold on an RDN case

1. In the **Task Panel** navigation tree, click **RDN Integration** and then click the tab for the case for which to release the hold.



2. Click **Release**. Latitude sends the release request to the RDN system. If sent successfully, the RDN system notifies the agent to resume the recovery process. Latitude removes the hold and displays a message indicating such. You cannot send case updates until you release the hold.

3. Click **Close**. Latitude adds a message to the **Recent Updates** data grid on the **Case Details** tab. Latitude also adds a row to the data grid on the **Summary** tab and includes a message about the hold removal.

Note: If your research determined that recovery is no longer necessary, close the case after releasing it so that the RDN system notifies the agent to discontinue the recovery process. For more information, see Close an RDN Case.

Related Topics

RDN Integration

Place an RDN Case on Hold

Allow RDN Case Creation and Updates Permission

Task Panels Permission

Task Panels

Feedback

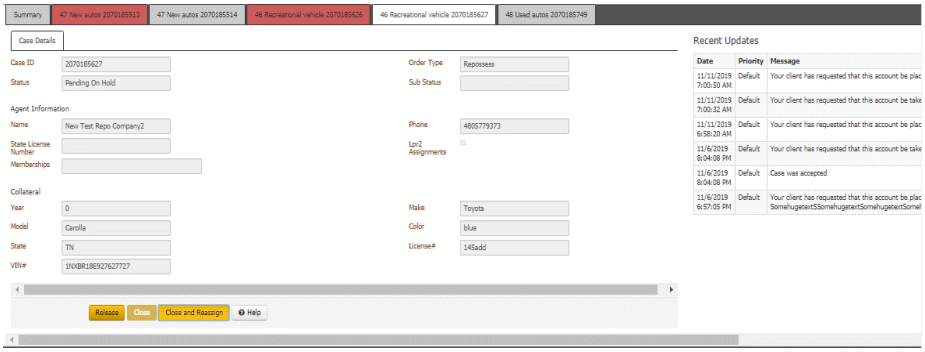
Close and Reassign an RDN Case

Use the **Reassign Case** dialog box to close a case with the current agent and reassign it to another agent. For example, if an agent fails to recover the piece of collateral within a specific time, the lienholder can close the case with that agent and reassign the case to another agent. Or, the piece of collateral is in a different area than originally thought so the case needs reassigned to an agent in the proper area.

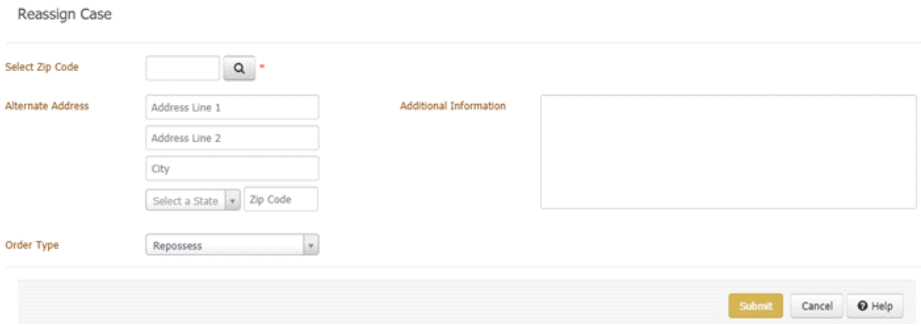
Note: Before closing and reassigning a case, place the case on hold. Otherwise, the system displays an error.

To close and reassign an RDN case

1. In the **Task Panel** navigation tree, click **RDN Integration** and then click the tab for the case to close and reassign.

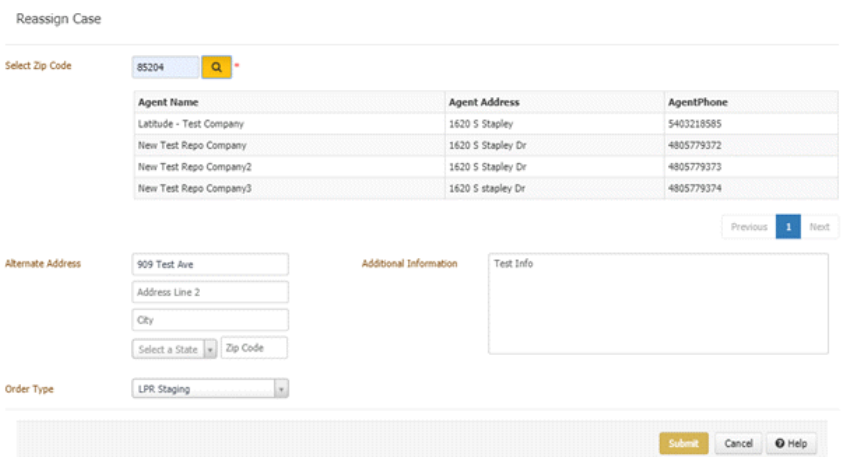


2. Click **Close and Reassign**.



3. Do the following:

    a. In the **Select Zip Code** box, type the ZIP code in which to search for a recovery agent and then click the Search icon. The agents located in that ZIP code appear in the data grid.



    b. In the data grid, click the agent to assign to the case.

4. (Optional) In the **Alternate Address** boxes, specify an alternate address where the agent might find the piece of collateral, or specify the agent's business address. If you add or modify this information, Latitude updates it on the reassigned case.

5. (Optional) In the **Additional Information**, type other information regarding the case. If you add or modify this information, Latitude updates it on the reassigned case.

6. To change the pre-populated order type, in the **Order Type** list box, click the type of order requested, such as vehicle transport or repossession. If you modify this information, Latitude updates it on the reassigned case.

7. Click **Submit Order**. Latitude sends the close and reassign case request to the RDN system. If sent successfully, RDN closes the case with the original agent and reassigns the case to the new agent. Latitude closes the original case and changes the case's tab to red to indicate that the case is closed. Then, Latitude adds a tab for the reassigned case.

Related Topics

RDN Integration

Allow RDN Case Creation and Updates Permission

Task Panels Permission

Task Panels

Feedback

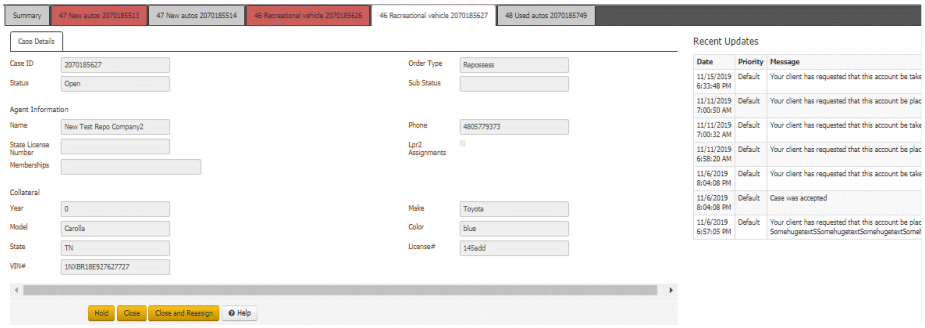
Close an RDN Case

Use the **Close Case** dialog box to close an RDN case. For example, you close a case when the customer pays the account in full or the agent recovers the piece of collateral.

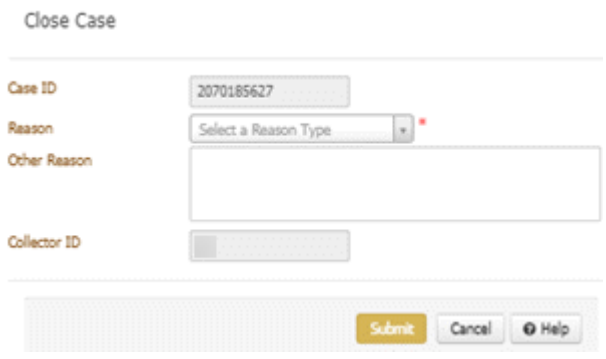
Note: If you placed a case on hold and then determined that recovery is no longer necessary, you must close the case after releasing it. Then, the RDN system can notify the agent to discontinue the recovery process.

To close an RDN case

1. In the **Task Panel** navigation tree, click **RDN Integration** and then click the tab for the case to close.



2. Click **Close**.



Case ID: Number that the RDN system assigned to identify the case.

Reason: Reason for closing the case.

Other Reason: Comments regarding case closure.

Collector ID: Code that identifies the user who's closing the case.

3. Complete the information and then click **Submit**. Latitude sends the close case request to the RDN system. If sent successfully, RDN closes the case with the agent. Latitude closes the case and changes the case's tab to red to indicate that the case is closed.

Related Topics

RDN Integration

Allow RDN Case Creation and Updates Permission

Task Panels Permission

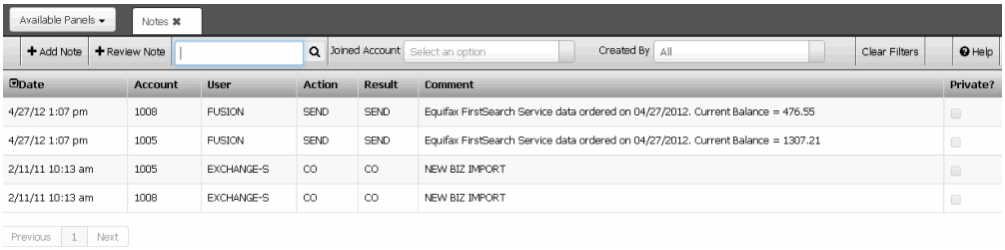
Task Panels

Reference Panels

Reference Panels

The **Reference** panels allow you to view reference information for an account. This section contains a **Reference Panel** navigation bar, which allows you to open the panels. Some panels also contain a toolbar with options for the selected panel. When you open a panel, a tab displays on the **Reference Panel** navigation bar (see the **Notes** tab in the following example). You can have multiple panels open at once and use the tabs to move between panels.

The **Notes** and **Interactions** panels are available to all users. The remaining panels available to you are based on how your organization configured the Reference Panels Permission.



Related Topics

Addresses

AIM

View Arrangement History

Collateral

Communication

Compliance

Credit Bureau Reporting

Credit Report

Custom Panel

Documentation

Early Stage

Email Addresses

Extra Data

Fusion Service History

Income and Expenditures

Interest Accrual

Interactions and Events

Medical

Miscellaneous Extra Data

Notes

Payment History

Phones

View Process and Stage History

Reference Panels Permission

Addresses

Feedback

Addresses

Use the **Address** panel to view, add, and modify addresses associated to an account.

Related Topics

View Addresses

Add an Address

Modify an Address

Data Grids

Reference Panels Permission

Reference Panels

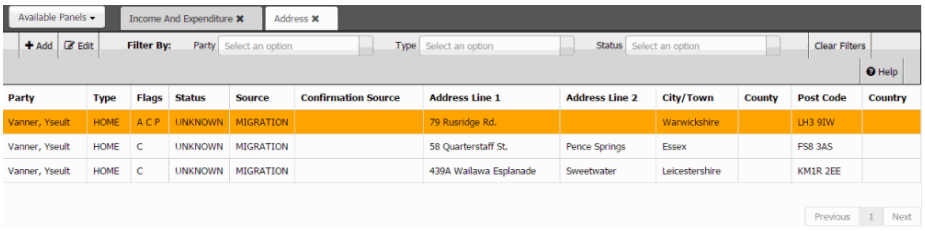
Feedback

View Addresses

Use the **Address** panel to view the addresses associated to the account. You can filter the addresses that display based on one or more criteria.

To view addresses

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Address**.



Party: Person associated to the address.

Type: Type of address, such as home or work.

Flags: Flags set for the address. Valid values are:

A = Active (address is in use)

C = Correspondence (users and the system can send correspondence to this address)

P = Primary (address is the primary address on the account)

Status: Status of the address, such as good, bad, or unknown.

Source: Source who provided the address, such as customer, client, or credit bureau.

Confirmation Source: Source who confirmed the validity of the address.

Address line 1: Person's address line 1.

Address line 2: Person's address line 2.

City/Town: Person's city or town.

County: Person's county.

Post Code: Person's postal code.

Country: Person's country.

2. To display addresses that meet specific criteria only, do one or more of the following:

   - To limit the addresses to a specific person on the account, in the **Party** box, click the person's name.
   - To limit the addresses to a specific type, in the **Type** box, click the address type.
   - To limit the addresses to a specific status, in the **Status** box, click the status.

   Only the addresses that match the selected criteria appear in the panel.

Tip: To clear the filters and display all addresses, click **Clear Filters**.

Related Topics

Data Grids

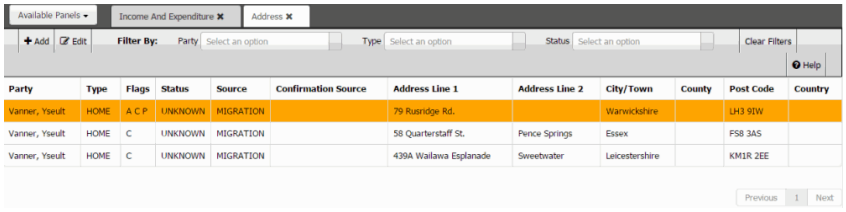
Addresses

Add an Address

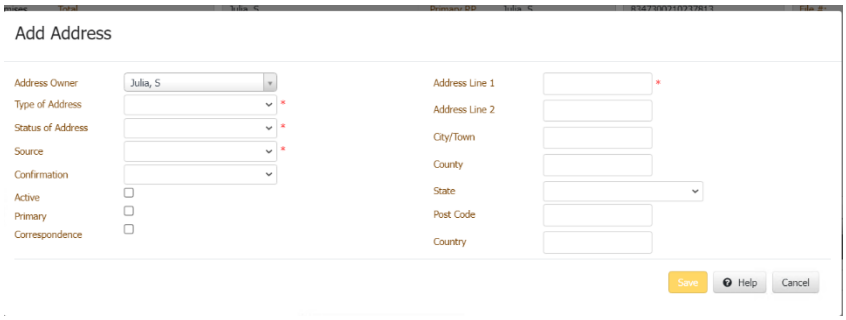
Use the **Add Address** dialog box to add an address to the account. You must have the Address Maintenance Permission.

To add an address

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Address**.



2. In the **Address** toolbar, click **Add**.



Address Owner: Person associated to the address.

Type of Address: Type of address, such as home or work.

Status of Address: Status of the address, such as good, bad, or unknown.

Source: Source who provided the address, such as customer, client, or credit bureau.

Confirmation: Source who confirmed the validity of the address.

Active: If selected, the address is in use.

Primary: If selected, the address is the primary (main) address on the account.

Correspondence: If selected, you can send correspondence to this address.

Address line 1: Person's address line 1.

Address line 2: Person's address line 2.

City/Town: Person's city or town.

County: Person's county.

Post Code: Person's postal code.

Country: Person's country.

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

Related Topics

Data Grids

Addresses

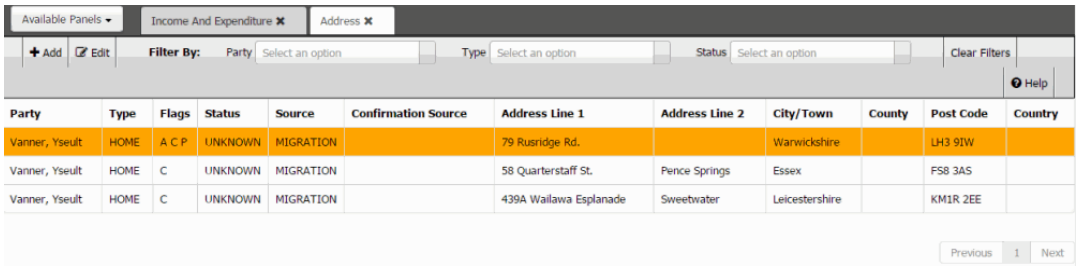
Feedback

Modify an Address

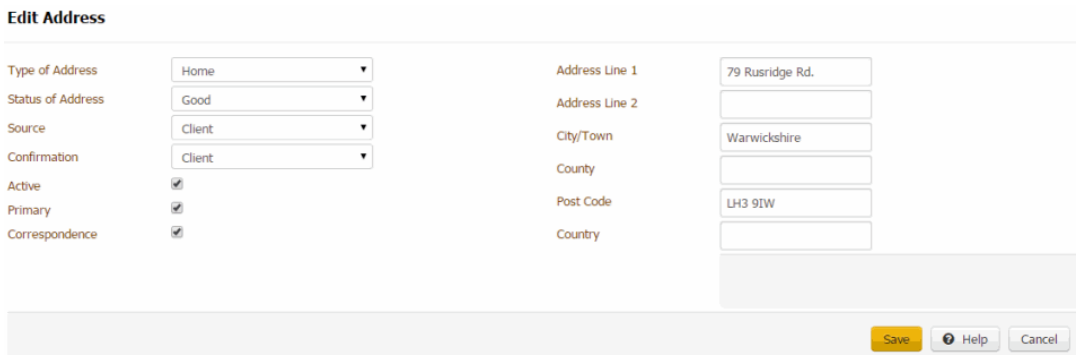
Use the **Edit Address** dialog box to modify an address for the account. You must have the Address Maintenance Permission.

To modify an address

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Address**.



2. In the data grid, click the address and then, in the **Address** toolbar, click **Edit**.



Type of Address: Type of address, such as home or work.

Status of Address: Status of the address, such as good, bad, or unknown.

Source: Source who provided the address, such as customer, client, or credit bureau.

Confirmation: Source who confirmed the validity of the address.

Active: If selected, the address is in use.

Primary: If selected, the address is the primary (main) address on the account.

Correspondence: If selected, you can send correspondence to this address.

Address line 1: Person's address line 1.

Address line 2: Person's address line 2.

City/Town: Person's city or town.

County: Person's county.

Post Code: Person's postal code.

Country: Person's country.

3. Modify the information and then click **Save**.

Note: If the person whose address you modified has other accounts, Latitude updates the address on those accounts also.

Related Topics

Data Grids

Addresses

Address Maintenance Permission

AIM

AIM

Use the **AIM** panel to view information from the Agency Interface Module (AIM) program. AIM allows you to track and maintain information for the accounts that clients placed with outside collection agencies or attorneys.

Related Topics

View General AIM Information

View AIM History

View AIM History Details

View AIM Requests and Notifications

Create an AIM Request

Create an AIM Response

View AIM Arrangements

View AIM Work Efforts

Reference Panels Permission

Reference Panels

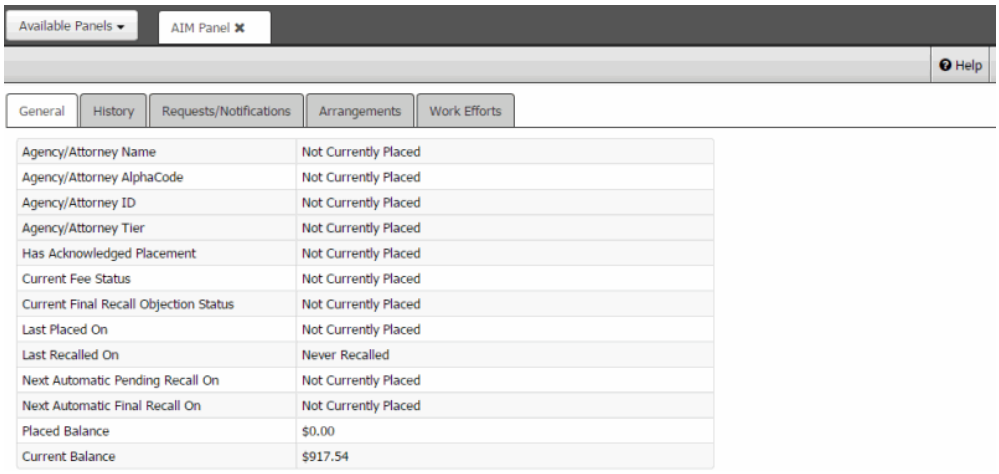
View General AIM Information

Use the **General** tab in the **AIM** panel to view general information pulled from the AIM program for the account.

To view general AIM information

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **AIM**.

2. In the **AIM** panel, click the **General** tab.



Agency/Attorney Name: Name of the outside collection agency or attorney where the client placed the account.

Agency/Attorney AlphaCode: External code that identifies the outside collection agency or attorney where the client placed the account. The system uses this code when creating files and folders for the agency or attorney.

Agency/Attorney ID: Code that the system assigns to identify the outside collection agency or attorney where the client placed the account.

Agency/Attorney Tier: Number used to group the outside collection agency or attorney where the client placed the account based on performance or preference.

Has Acknowledged Placement: Indicates whether the outside collection agency or attorney confirmed receipt of the account.

Current Fee Status: Fee schedule or commission percentage for applying commissions.

Current Final Recall Objection Status: Indicates whether the system received a final recall objection from the outside collection agency or attorney.

Last Placed On: Date the client last placed the account with an outside collection agency or attorney.

Last Recalled On: Date the system last recalled the account from the outside collection agency or attorney.

Next Automatic Pending Recall On: Date of the next automatic pending recall.

Next Automatic Final Recall On: Date of the next automatic final recall.

Placed Balance: Balance on the account when the client placed the account with the outside collection agency or attorney.

Current Balance: Current account balance.

Related Topics

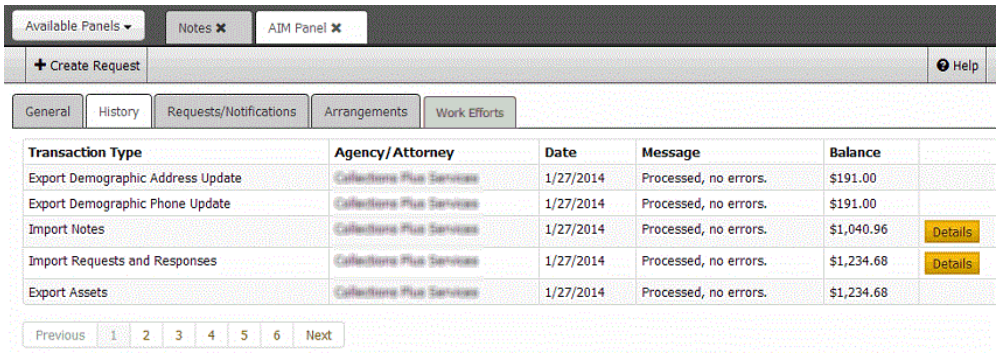
AIM

View AIM History

Use the **History** tab in the **AIM** panel to view transaction history pulled from the AIM program for the account.

To view AIM history

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **AIM**.
2. In the **AIM** panel, click the **History** tab.



Transaction Type: Type of AIM transaction.

Agency/Attorney: Outside collection agency or attorney that held the account when AIM processed the transaction.

Date: Date that AIM processed the transaction.

Message: Information regarding the transaction.

Balance: Balance on the account when AIM processed the transaction.

Related Topics

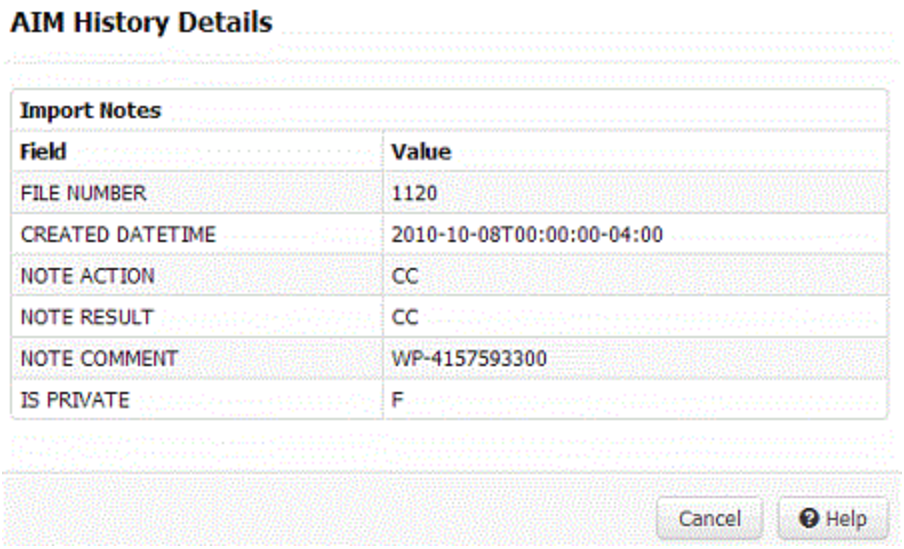
AIM

View AIM History Details

Use the **AIM History Details** dialog box to view transaction history details pulled from the AIM program for the account.

To view AIM history details

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **AIM**.
2. In the **AIM** panel, click the **History** tab.
3. In the data grid, click **Details**.



Field: Transaction detail data item.

Value: Value associated to the transaction detail data item.

Related Topics

AIM

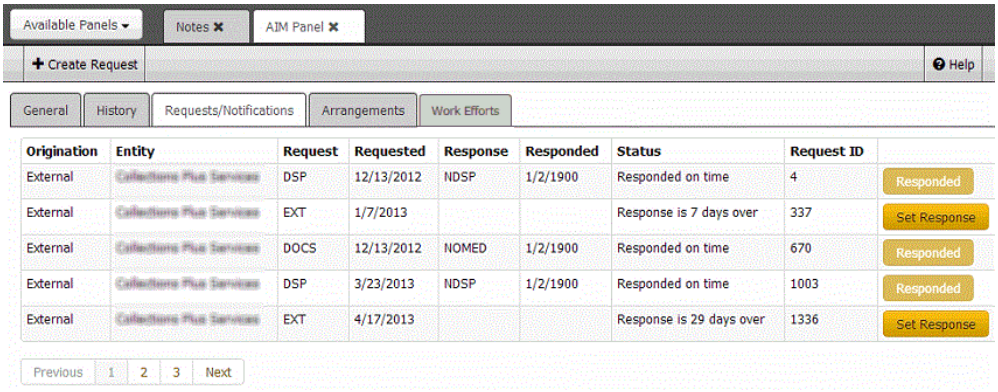
Feedback

View AIM Requests and Notifications

Use the **Requests/Notifications** tab in the **AIM** panel to view requests and notifications pulled from the AIM program for the account.

To view AIM requests and notifications

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **AIM**.
2. In the **AIM** panel, click the **Requests/Notifications** tab.



Origination: Source where the request or notification originated.

Entity: Organization or individual that sent the request or notification.

Request: Code that identifies the type of request or notification.

Requested: Date of the request or notification.

Response: Code that identifies the response to the request or notification.

Responded: Date of the response to the request or notification.

Status: Status of the response to the request or notification.

Request ID: Code that identifies the request.

Related Topics

AIM

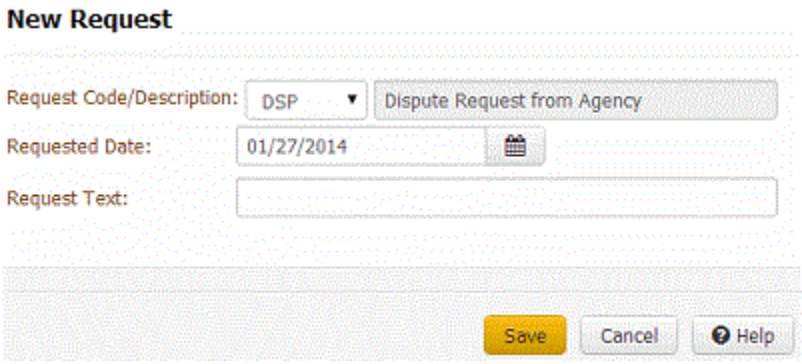
Feedback

Create an AIM Request

Use the **New Request** dialog box to create a request for the outside collection agency or attorney that holds the account. If an outside collection agency or attorney doesn't hold the account, you cannot create a request.

To create an AIM request

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **AIM**.
2. In the **AIM** toolbar, click **Create Request**.



Request Code/Description: Code and description that identify the type of request.

Requested Date: Date of the request.

Request Text: More information regarding the request.

3. Complete the information and click **Save**. The system adds the request to the data grid on the **Requests/Notifications** tab.

Related Topics

AIM

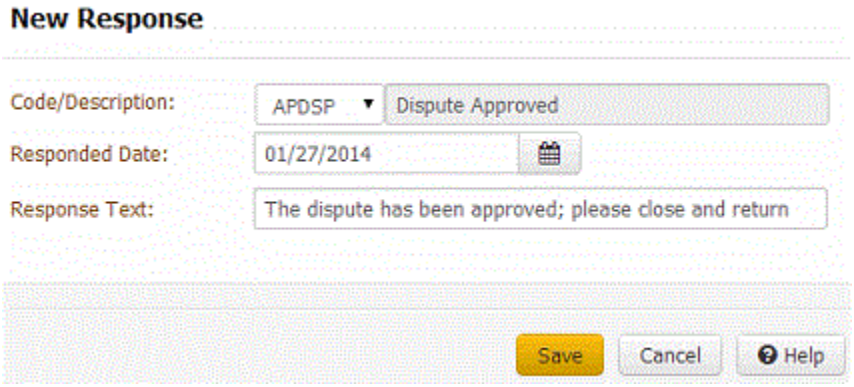
Feedback

Create an AIM Response

Use the **New Response** dialog box to create a response to a request for the outside collection agency that holds the account.

To create an AIM response

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **AIM**.
2. In the **AIM** panel, click the **Requests/Notifications** tab.
3. In the data grid, click **Set Response**.



Code/Description: Code and description that identify the type of response.

Responded Date: Date of the response.

Response Text: More information regarding the response.

4. Complete the information and click **Save**. The system adds the response to the data grid on the **Requests/Notifications** tab, and sets the status to "responded."

Related Topics

AIM

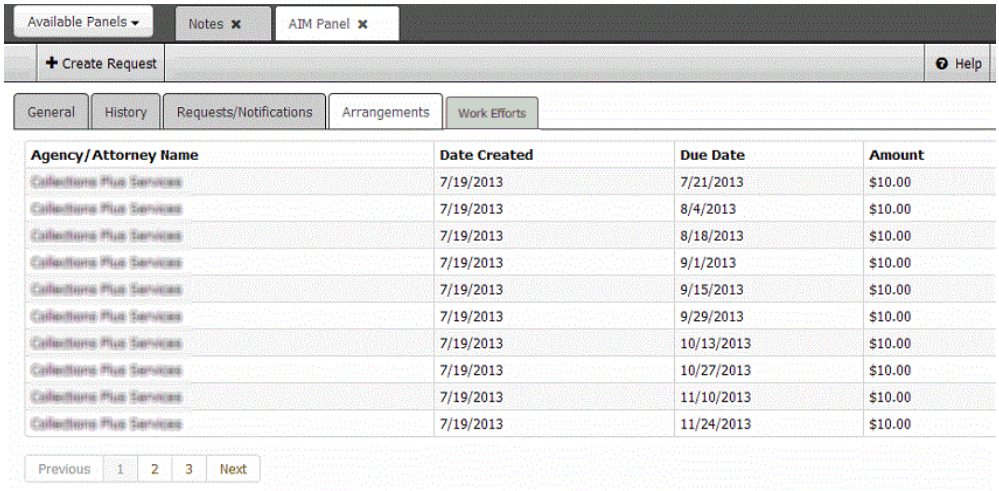
Feedback

View AIM Arrangements

Use the **Arrangements** tab in the **AIM** panel to view payment arrangement information pulled from the AIM program for the account.

To view AIM arrangements

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **AIM**. The **AIM** panel appears.
2. In the **AIM** panel, click the **Arrangements** tab. The **Arrangements** tab appears.



Agency/Attorney Name: Outside collection agency or attorney that holds the account.

Date Created: Date a user created the payment arrangement.

Due Date: Date the payment is due.

Amount: Payment amount due.

Related Topics

AIM

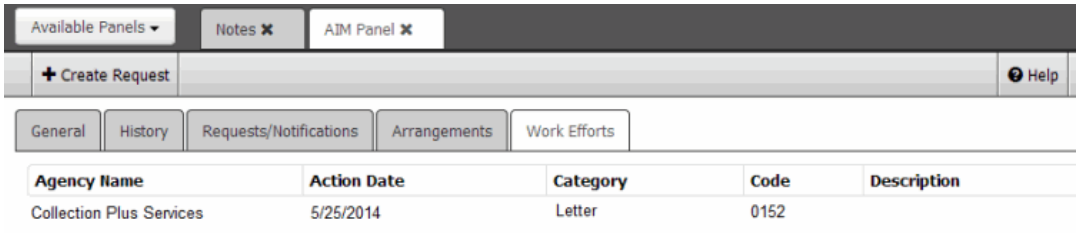
Feedback

View AIM Work Efforts

Use the **Work Efforts** tab in the **AIM** panel to view work effort information pulled from the AIM program for the account.

To view AIM work efforts

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **AIM**. The **AIM** panel appears.
2. In the **AIM** panel, click the **Work Efforts** tab. The **Work Efforts** tab appears.



Agency Name: Outside collection agency or attorney that holds the account.

Action Date: Date the work effort occurred.

Category: Type of work effort.

Code: Code that identifies the work effort.

Description: Description of the work effort.

Related Topics
AIM

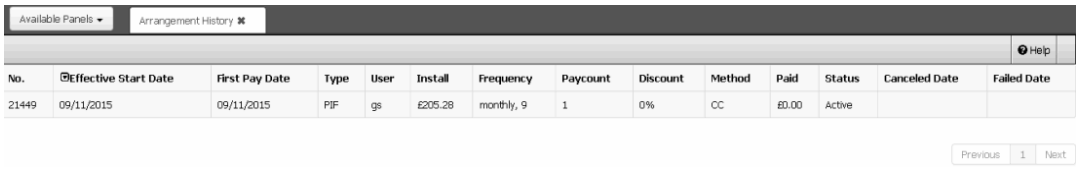
Feedback

View Arrangement History

Use the **Arrangement History** panel to view historical payment arrangement information for the account.

To view arrangement history

- In the **Reference Panel** navigation bar, click **Available Panels** and then click **Arrangement History**.



No.: Unique number that the system assigns to identify an arrangement.

Effective Start Date: Date the arrangement starts.

First Pay Date: Date the first payment is due.

Type: Type of arrangement, such as SIF or PIF.

User: User who created the arrangement.

Install: Amount of each payment.

Frequency: How often each payment is due.

Paycount: Number of payments in the arrangement.

Discount: Percent discount offered.

Method: Method to use to process the payment, such as credit card or check.

Paid: Amount paid toward the arrangement to date.

Status: Status of the payment.

Canceled Date: Date the user canceled the arrangement.

Failed Date: Payment decline date.

Related Topics
Reference Panels

Arrangements

Reference Panels Permission

Reference Panels

AIM Receiver

AIM Receiver

Use the AIMReceiver Panel to view create requests for information and respond to requests for information for AIM (Agency Interface Module) Receiver. Outside collection agencies and attorneys use AIM Receiver to import data from and export data to their customers.

To view the panel, your administrator must have selected the panel in the Reference Panels Permission permission.

Create Requests: To add a new request. For more information, see Create an AIM Receiver Request

Requested: Date of the request. The system populates this box and you cannot change the value.

Responded: Date of the response. This box is unavailable when creating a request.

Request Text: Description of the request. If default text exists for the specified request code, it appears in this box. You can modify the information in this box as necessary.

Response Text: Description of the response to the request. You can modify the information in this box as necessary.

Request Code: Code that identifies the type of request.

Response Code: Code that identifies the type of response.

Request Origination: Source where the request originated. The system populates this box and you cannot change the value.

Related Topics

Create an AIM Receiver Request

Respond to an AIM Receiver

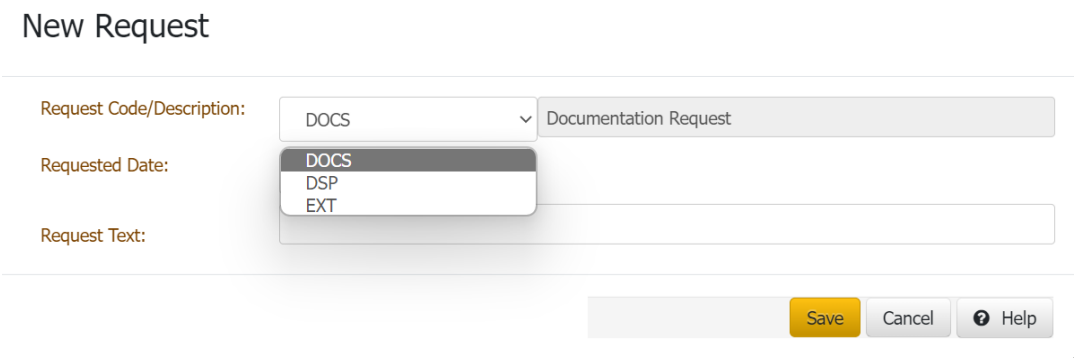
AIM

Create an AIM Receiver Request

Latitude sends the request to AIM Receiver, and AIM Receiver sends it to an outside collection agency or attorney.

To create an AIM Receiver request

1. Click **Create Request** button. A **New Request** dialog box appears.



- **Request Code/Description:** Code that identifies the type of request.
- **Request Date:** Date of the request. The system populates this box and you cannot change the value.
- **Request Test:** Description of the request. If default text exists for the specified request code, it appears in this box. You can modify the information in this box as necessary. Complete the information and then click **Save**. The dialog box closes and the request appears in the AIM Receiver Panel grid.
- **Document Type:** This is an optional field. If selected it would create an open AIM CDOC transaction for the document type. This can be used when a document needs to be sent along with the response, the user can mention the document name in the response field.

Related Topics

Respond to an AIM Receiver

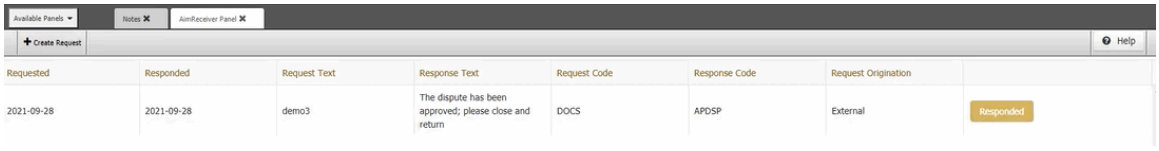
AIM Receiver

AIM

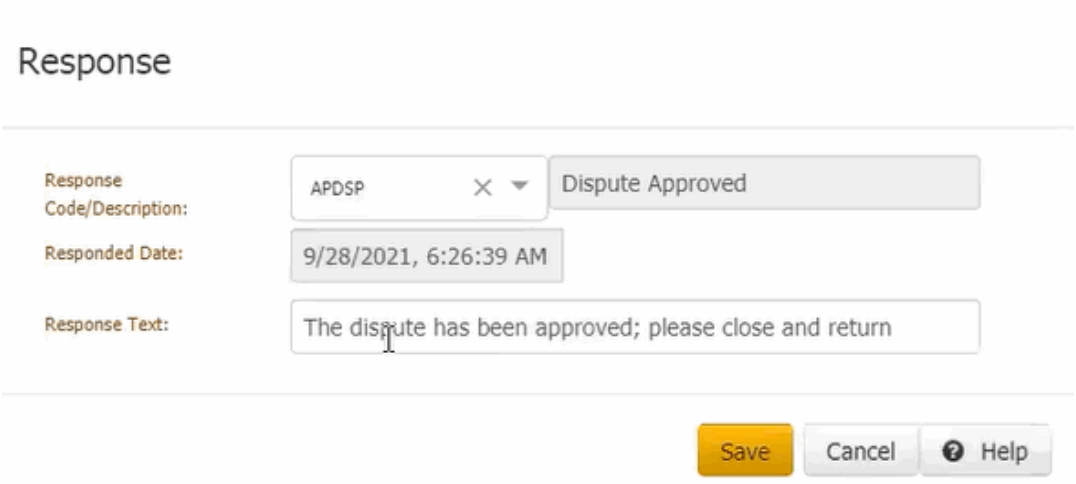
Respond to an AIM Receiver

You can respond to the request from AIM receiver panel.

To respond to an AIM Receiver request



1. With an account displayed in the AIM Receiver Panels section, click **Set Response**. A **Response** dialog box appears.



- **Response Code/Description:** Code that identifies the type of response.
- **Set Response:** Response to the request.
- **Response Date**: Date of the response.
- **Response Text**: Description of the response to the request. You can modify the information in this box as necessary.

Complete the information and then click **Save**. The system closes the dialog box and the set response gets updated to **Responded**.

Related Topics

Create an AIM Receiver Request

AIM Receiver

AIM

Automotive

Feedback

Automotive

Use the **Automotive** panel to maintain vehicle collateral, repossession, lease, and auction information for the account displayed in the **Work Form**.

Related Topics

Maintain Automotive Collateral Information

Maintain Automotive Repossession Information

Automotive Auction

Maintain Automotive Lease Information

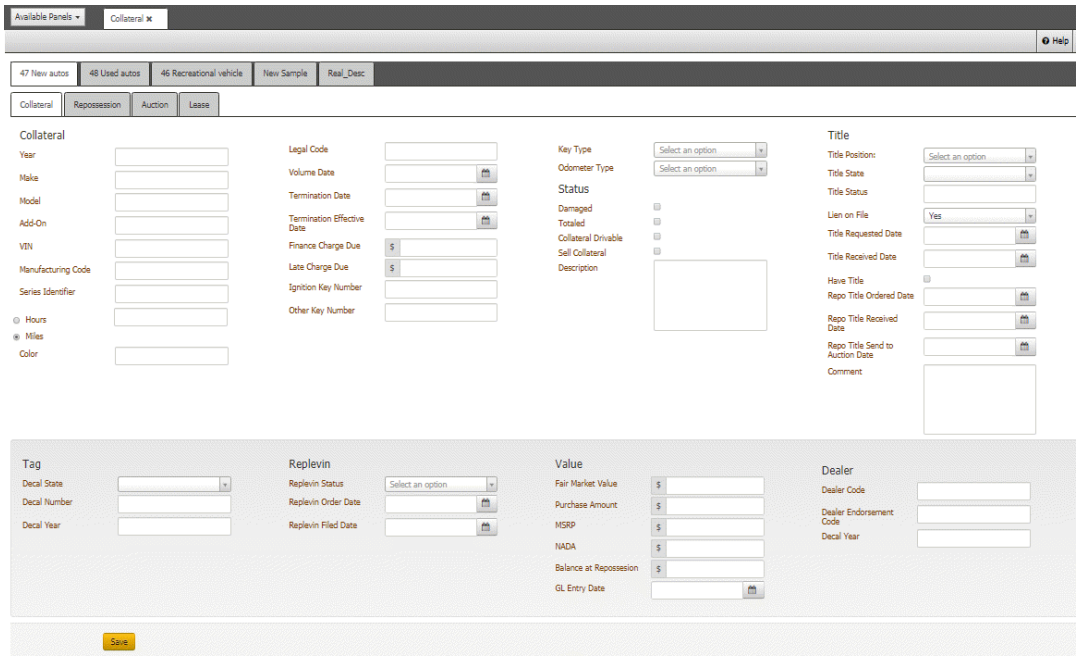
Feedback

Maintain Automotive Collateral Information

Use the **Collateral** tab in the **Automotive** panel to maintain automotive collateral information for the account displayed in the **Work Form**.

To maintain automotive collateral information

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Automotive**.
2. In the **Automotive** panel, click the **Collateral** tab.



Collateral

Year: Vehicle model year.

Make: Vehicle manufacturer.

Model: Vehicle model.

Add-On: Optional features on the vehicle.

VIN: Vehicle Identification Number.

Manufacturing Code: Code that identifies the vehicle manufacturer.

Series Identifier: Series code that identifies the vehicle.

Color: Color of the vehicle.

Ignition Key Number: Number that identifies the ignition key.

Other Key Number: Number that identifies an extra vehicle key, such as the valet key.

Purchase Amount: Purchase amount the vehicle.

MSRP: Manufacturer Suggested Retail Price.

Fair Market Value: Amount the vehicle would sell for on the open market.

Hours: If selected, the number of hours on the vehicle.

Miles: If selected, the number of miles on the vehicle.

Totaled: If selected, the lien holder considers the vehicle totaled.

Damaged: If selected, the lien holder considers the vehicle damaged.

Sell Collateral: If selected, the lien holder intends to sell the vehicle for collateral.

Description: Description of the condition of the vehicle.

Legal Code: Legal code that grants the lien holder or credit agency the right to repossess the vehicle when the borrower defaults on the loan or lease agreement.

Volume Date:

Termination Date: Termination date of the loan contract.

Termination Effective Date: Date the termination of the loan contract became effective.

Finance Charge Due: Finance charge due on the loan.

Late Charge Due: Late charge due on the loan.

Tag

Decal State: State listed on the vehicle's license plate.

Decal Number: Vehicle's license plate number.

Decal Year: Vehicle's license plate year.

Title

Title Position: Position of the title (for example, original, duplicate).

Title State: State listed on the vehicle's title.

Title Status: Status of the vehicle's title (for example, salvage, rebuilt, junk).

Have Title: If selected, indicates that your organization has the title.

Dealer

Dealer Code: Dealer's license number.

Dealer Endorsement Code: Code that identifies the dealer's auto-broker endorsement.

Dealer Reserve Charge Back: Amount the finance company charged back to the dealer for early payoff of a loan.

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

Related Topics

Automotive

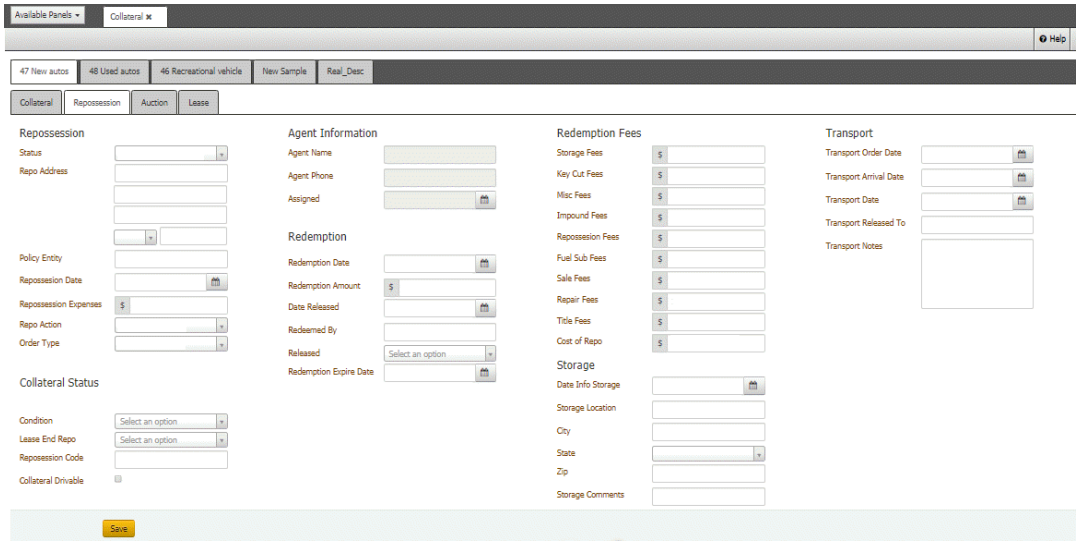
Feedback

Maintain Automotive Repossession Information

Use the **Repossession** tab in the **Automotive** panel to maintain automotive repossession information for the account displayed in the **Work Form**.

To maintain automotive repossession information

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Automotive**.
2. In the **Automotive** panel, click the **Repossession** tab.



Status: Status of the vehicle repossession.

Repossession

Address: Location of the vehicle.

Policy Entity: Insurance agency where the repossession company has an insurance policy.

Date Repo Completed: Date the agency repossessed the vehicle.

Balance at Repossession: Balance due on the loan or lease when the vehicle was repossessed.

Repossession Expenses: Cost of repossessing the vehicle.

Collateral Status

Condition: Condition of the vehicle when the agency repossessed it.

Lease End/Repo: Indicates whether the lease ended or the agency repossessed the vehicle.

Repossession Code: Vehicle factory key code that allows the repossession agency to drive the vehicle away rather than tow it.

Collateral Drivable: If selected, the vehicle was drivable when the agency repossessed it.

Agency Information

Agency Name: Name of the repossession agency.

Agency Phone: Repossession agency's phone number.

Assigned: Repossession agency assignment date.

Redemption

Redemption Date: Last date the customer has to redeem the vehicle.

Redemption Amount: Amount the customer must remit to redeem the vehicle. This amount can include past due amounts, total remainder of the debt, and any fees incurred from the repossession.

Date Released: Vehicle release date to customer.

Redeemed by: Person who redeemed the vehicle.

Released: Method of release.

Storage

Date Into Storage: Repossessed vehicle's storage date.

Storage Location: Storage location of the repossessed vehicle.

Storage Comments: Comments regarding storage of the repossessed vehicle.

Redemption

Repossession Fees: Repossession fees incurred.

Storage Fees: Storage fees incurred.

Key Cut Fee: Fee for having a key made.

Misc Fees: Miscellaneous fees related to the repossession.

Impound Fee: Impound fee incurred.

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

Related Topics

Automotive

Automotive Auction

Feedback

Automotive Auction

Use the **Auction** panel to maintain automotive repairs, bids, appraisals, and auction information for the account displayed in the **Work Form**.

Related Topics

Maintain Automotive Auction Information

View Automotive Repair Bids

View Automotive Appraisals

View Automotive Purchasing Bids

Automotive

Feedback

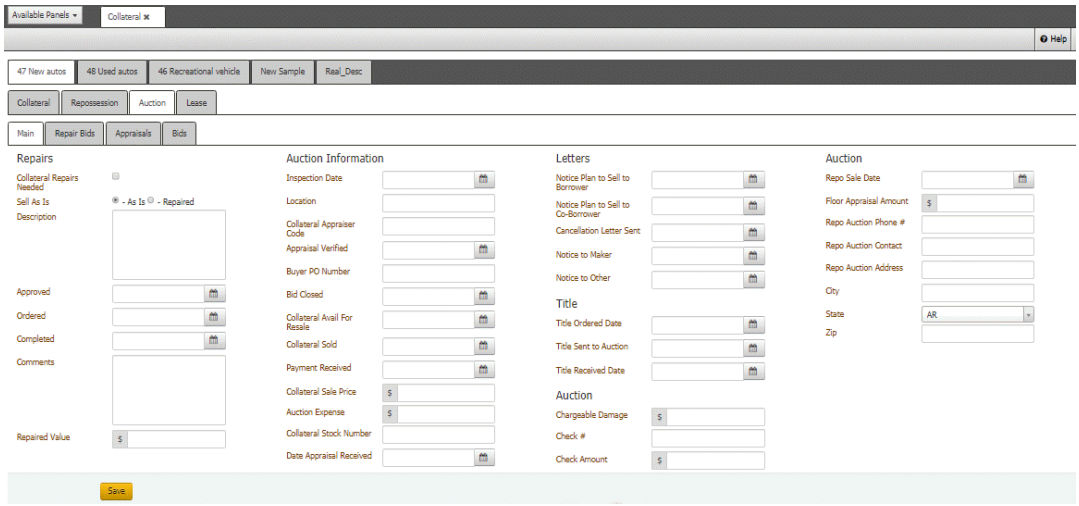
Maintain Automotive Auction Information

Use the **Main** tab on the **Auction** tab in the **Automotive** panel to maintain automotive auction information for the account displayed in the **Work Form**.

To maintain automotive auction information

1. With an account displayed in the **Work Form**, in the **Reference Panel** navigation bar, click **Available Panels** and then click **Automotive**.

2. In the **Automotive** panel, click the **Auction** tab and then click the **Main** tab.



Repairs

Collateral Repairs Needed: If selected, the vehicle needs repairs.

Sell as is: Indicates whether the vehicle is selling in "as is" or "repaired" condition.

Description: Description of the needed repairs.

Approved: Repair approval date.

Ordered: Repair order date.

Completed: Repair completion date.

Comments: Comments regarding the repairs.

Repaired Value: Monetary value of the vehicle after repairs.

Auction Information

Inspection Date: Date the auction house inspected the vehicle.

Location: Location of the auction house.

Collateral Appraiser Code: Code that identifies the appraiser.

Appraisal Verified: Appraisal verification date.

Buyer PO Number: Vehicle buyer's purchase order number.

Bid Closed: Date bidding on the vehicle closed.

Collateral Avail for Resale: Date the vehicle became available for resale.

Collateral Sold: Date the vehicle sold at auction.

Payment Received: Date your organization received the payment from the auction house.

Collateral Sale Price: Amount the vehicle sold for.

Auction Expense: Fees associated with auctioning the vehicle.

Collateral Stock Number: Stock number the auction house assigned to the vehicle.

Letters

Letter to Lien Holder 1: Date your organization sent a letter to the first lien holder regarding auctioning of the vehicle.

Letter to Lien Holder 2: Date your organization sent a letter to the second lien holder regarding auctioning of the vehicle.

Notice to Guarantor: Date your organization sent a notice to the guarantor regarding auctioning of the vehicle.

Notice to Maker: Date your organization sent a notice to the lender regarding auctioning of the vehicle.

Notice to Other: Date your organization sent a notice to another party regarding auctioning of the vehicle.

Title

Title Ordered Date: Date your organization ordered the vehicle title.

Title Sent to Auction: Date your organization sent the vehicle title to the auction house.

Title Received Date: Date the auction house received the vehicle title.

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

Related Topics

Automotive Auction

Automotive

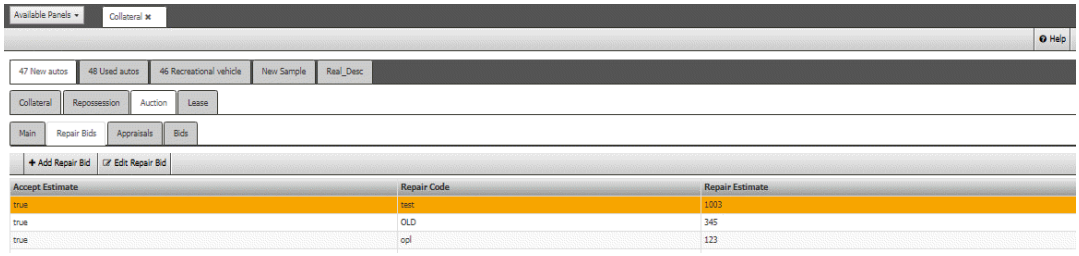
Feedback

View Automotive Repair Bids

Use the **Repair Bids** tab on the **Auction** tab in the **Automotive** panel to view automotive repair bids for the account displayed in the **Work Form**.

To view automotive repair bids

1. With an account displayed in the **Work Form**, in the **Reference Panel** navigation bar, click **Available Panels** and then click **Automotive**.
2. In the **Automotive** panel, click the **Auction** tab.
3. On the **Auction** tab, click the **Repair Bids** tab.



Accept Estimate: Indicates whether your organization accepted the repair estimate.

Repair Code: Code that identifies the type of repair.

Repair Estimate: Estimated cost of repair.

Related Topics

Automotive Auction

Automotive

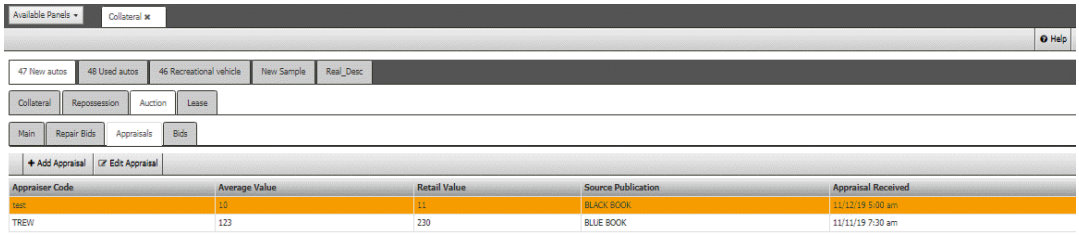
Feedback

View Automotive Appraisals

Use the **Appraisals** tab on the **Auction** tab in the **Automotive** panel to view automotive appraisals for the account displayed in the **Work Form**.

To view automotive appraisals

1. With an account displayed in the **Work Form**, in the **Reference Panel** navigation bar, click **Available Panels** and then click **Automotive**.
2. In the **Automotive** panel, click the **Auction** tab.
3. On the **Auction** tab, click the **Appraisals** tab.



Appraiser Code: Code that identifies the appraiser.

Average Value: Average value of the vehicle.

Retail Value: Retail value of the vehicle.

Source Publication: Source from which your organization obtained the appraisal (for example, Kelley Blue Book).

Appraisal Received: Date your organization received the appraisal.

Related Topics

Automotive Auction

Automotive

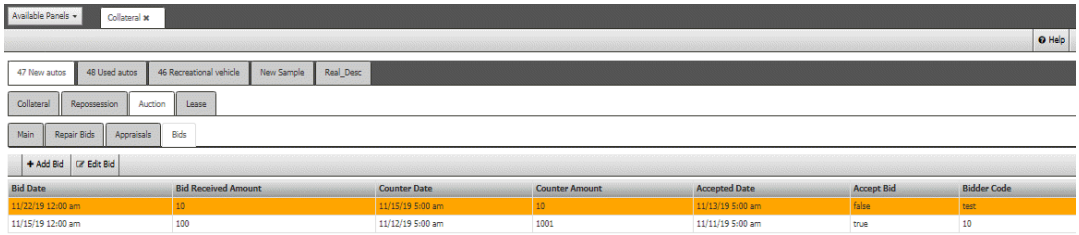
Feedback

View Automotive Purchasing Bids

Use the **Bids** tab on the **Auction** tab in the **Automotive** panel to view automotive purchasing bids for the account that is displayed in the **Work Form**.

To view automotive purchasing bids

1. With an account displayed in the **Work Form**, in the **Reference Panel** navigation bar, click **Available Panels** and then click **Automotive**.
2. In the **Automotive** panel, click the **Auction** tab.
3. On the **Auction** tab, click the **Bids** tab.



Accept Bid: Indicates whether your organization accepted the bid.

Bidder Code: Code that identifies the bidder.

Bid Amount: Amount of the bid.

Bid Date: Date the buyer placed the bid.

Related Topics

Automotive Auction

Automotive

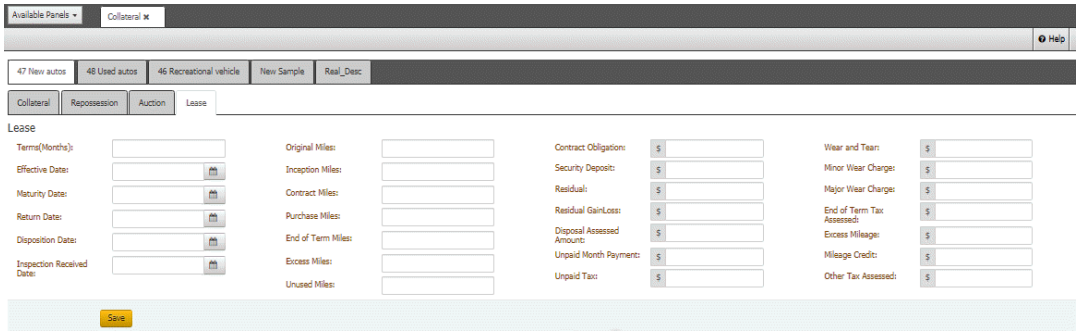
Feedback

Maintain Automotive Lease Information

Use the **Lease** tab in the **Automotive** panel to maintain automotive lease information for the account displayed in the **Work Form**.

To maintain automotive lease information

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Automotive**.
2. In the **Automotive** panel, click the **Lease** tab.



Term (Months): Length of the lease, in months.

Effective Date: Date the lease became effective.

Maturity Date: Date the lease matured.

Return Date: Date the leasing agency received the vehicle.

Disposition Date: Date the leasing agency determined the status of the returned vehicle.

Inspection Received Date: Date the leasing agency inspected the vehicle.

Original Miles: Original mileage on the leased vehicle.

Inception Miles: Mileage at the beginning of the lease term.

Contract Miles: Mileage allowed under the leasing contract.

Purchase Miles: Number of extra miles purchased.

End of Term Miles: Mileage at the end of the lease term.

Excess Miles: Number of miles in excess of the contract and purchased miles.

Unused Miles: Number of unused contract and purchased miles.

Contract Obligation: Total amount due under the lease agreement. This amount excludes the security deposit, sales tax, and any other fees and taxes paid to a third party.

Security Deposit: Amount the lessee paid as a security deposit.

Residual: Lease-end value of the vehicle.

Residual Gain/Loss: Difference between the residual value and the end-of-lease purchase price.

Disposal Assessed Amount: Amount charged to dispose of the vehicle.

Unpaid Month Payment: Number of months during the lease term that the lessee did not make a payment.

Unpaid Tax: Amount in unpaid taxes that the lessee owes.

Wear and Tear: Total amount charged for wear and tear on the vehicle.

Minor Wear Charge: Amount charged for minor wear on the vehicle.

Major Wear Charge: Amount charged for major wear on the vehicle.

End of Term Tax Assessed: Tax assessed at the end of the lease.

Excess Mileage: Amount charged for each mile in excess of the mileage limit.

Mileage Credit: Amount credited for unused mileage.

Other Tax Assessed: Amount charged for other taxes (for example, property tax).

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

Related Topics

Automotive

Collateral

Collateral

Use the **Collateral** panel to maintain vehicle and real estate collateral information. You can modify collateral items but you cannot add them. Latitude adds pieces of collateral to the panel based on the data bridge file that the client provides for the account. Latitude creates one tab for each piece of collateral in the bridge file. You must have the Allow Collateral Editing Permission.

Important!

If you are using the Recovery Database Network (RDN) system to exchange collateral data, DO NOT modify the collateral data manually that the RDN system populates. The ability to edit collateral is for clients who aren't using the RDN system. Genesys cannot determine which clients use the RDN system so it's up to the clients who use the RDN system to ensure that they don't modify the data.

Related Topics

[Maintain Vehicle Collateral Information]

[Maintain Repossession Information]

[Maintain Auction Information]

[Maintain Lease Information]

[Maintain Real Estate Collateral]

[Reference Panels Permission]

[Reference Panels]

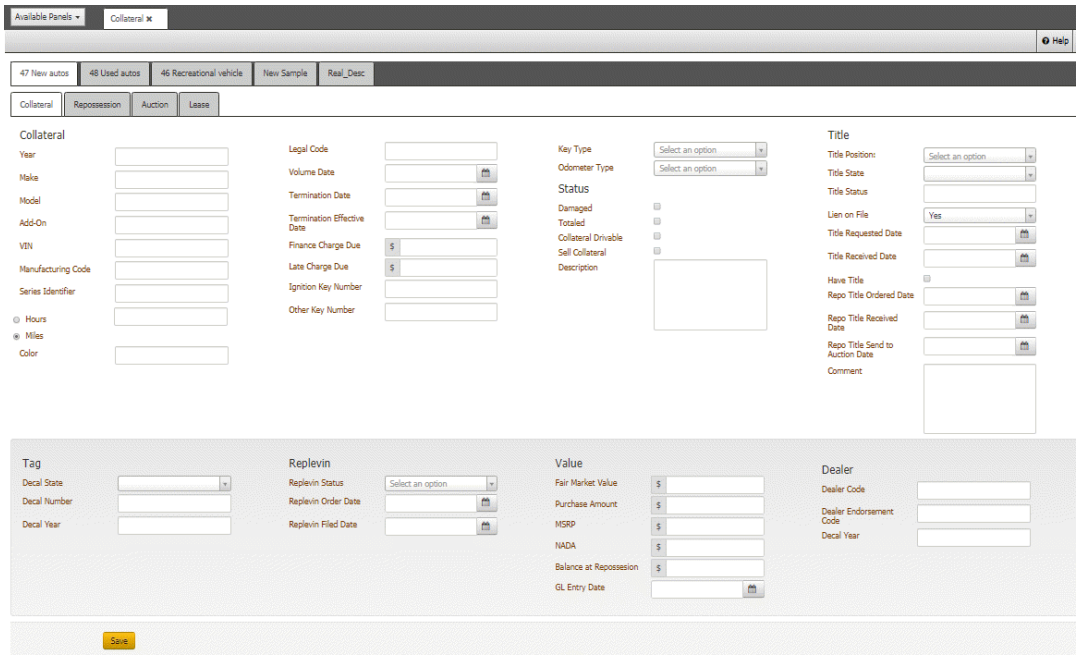
Feedback

Maintain Vehicle Collateral Information

Use the **Collateral** tab in the **Collateral** panel to maintain collateral information for a vehicle.

To maintain vehicle collateral information

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Collateral**.
2. Click the tab for the collateral to modify and then click the **Collateral** tab.



Collateral

Year: Vehicle model year.

Make: Vehicle manufacturer.

Model: Vehicle model.

Add-On: Optional features on the vehicle.

VIN: Vehicle Identification Number.

Manufacturing Code: Code that identifies the vehicle manufacturer.

Series Identifier: Series code that identifies the vehicle.

Hours: If selected, the number of hours on the vehicle.

Miles: If selected, the number of miles on the vehicle.

Color: Color of the vehicle.

Sequence: Customer internal identifier for each piece of collateral.

Legal Code: Legal code that grants the lienholder or credit agency the right to repossess the vehicle when the borrower defaults on the loan or lease agreement.

Volume Date: N/A

Termination Date: Termination date of the loan contract.

Termination Effective Date: Date the termination of the loan contract became effective.

Finance Charge Due: Finance charge due on the loan.

Late Charge Due: Late charge due on the loan.

Ignition Key Number: Number that identifies the ignition key.

Other Key Number: Number that identifies an extra vehicle key, such as the valet key.

Key Type: Type of ignition key, such as single or double cut.

Odometer Type: Type of odometer, such as digital or analog.

Status

Damaged: If selected, the lienholder considers the vehicle damaged.

Totaled: If selected, the lienholder considers the vehicle totaled.

Collateral Drivable: If selected, indicates that the vehicle is drivable.

Sell Collateral: If selected, the lienholder intends to sell the vehicle for collateral.

Description: Description of the condition of the vehicle.

Title

Title Position: Type of title (for example, original, duplicate).

Title State: State listed on the vehicle's title.

Title Status: Status of the vehicle's title (for example, salvage, rebuilt, junk).

Lien on File: Indicates whether a lien is on file with the state.

Title Requested Date: Indicates the date the lienholder requested the vehicle's title from the state.

Title Received Date: Indicates the date the lienholder received the vehicle's title from the state.

Have Title: If selected, indicates that your organization has the vehicle's title.

Repo Title Ordered Date: Date the lienholder ordered a repossession title for the vehicle.

Repo Title Received Date: Date the lienholder received the repossession title for the vehicle.

Repo Title Send to Auction Date: Date the lienholder sent the vehicle's repossession title to the auction house.

Comment: Other information regarding the vehicle's title.

Tag

Decal State: State listed on the vehicle's license plate.

Decal Number: Vehicle's license plate number.

Decal Year: Vehicle's license plate year.

Replevin

Replevin Status: Status of the recovery.

Replevin Order Date: Date the lienholder ordered the recovery.

Replevin Filed Date: Date the lienholder scheduled the recovery.

Value

Fair Market Value: Amount the vehicle would sell for on the open market.

Purchase Amount: Purchase amount of the vehicle.

MSRP: Manufacturer Suggested Retail Price.

NADA: The vehicle's National Association of Automobile Dealers blue book value.

Balance at Repossession: Balance due on the vehicle or lease at time of repossession.

GL Entry Date: Date the lienholder posted the surplus or deficiency amount in the General Ledger.

Dealer

Dealer Code: Dealer's license number.

Dealer Endorsement Code: Code that identifies the dealer's auto-broker endorsement.

Dealer Reserve Charge Back: Amount the finance company charged back to the dealer for early payoff of a loan.

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

Note: When you update collateral data on the **Collateral** panel, Latitude doesn't update the RDN system automatically. You must send an update. For more information, see Send a Case Update to RDN.

Related Topics

Collateral

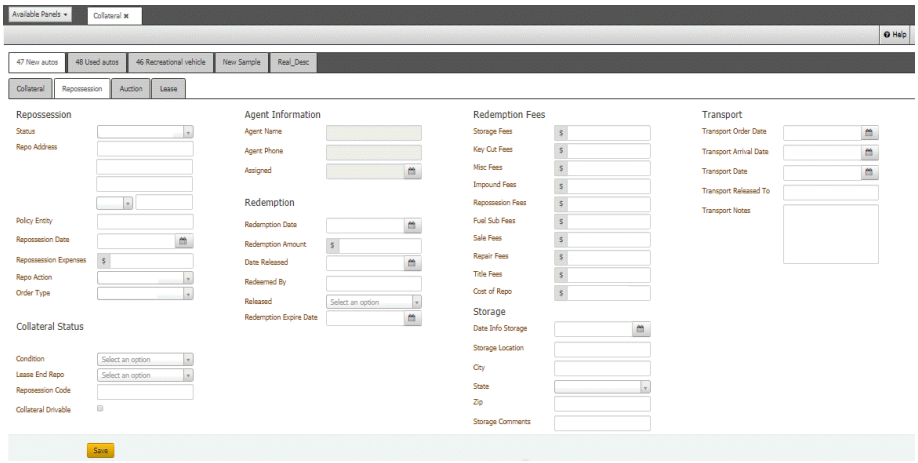
Maintain Repossession Information

Use the **Repossession** tab in the **Collateral** panel to maintain repossession information for a vehicle. If your organization uses RDN, Latitude populates the data on this tab from the RDN APIs based on the repossession activity of the repossession agent or agency.

To maintain repossession information

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Collateral**.

2. Click the tab for the collateral to modify and then click the **Repossession** tab.



Repossession

Status: Status of the vehicle repossession.

Repo Address: Location of the vehicle.

Policy Entity: Insurance agency where the repossession company has an insurance policy.

Repossession Date: Date the agent repossessed the vehicle.

Repossession Expenses: Total cost to repossess the vehicle.

Repo Action: Action that prompted the repossession.

Order Type: Repossession order type.

Collateral Status

Condition: Condition of the vehicle when the agent repossessed it.

Lease End Repo: Indicates whether the lease ended or the agent repossessed the vehicle.

Repossession Code: Vehicle factory key code that allows the repossession agent to drive the vehicle away rather than tow it.

Collateral Drivable: If selected, the vehicle was drivable when the agent repossessed it.

Agent Information

Agent Name: Name of the repossession agent.

Agent Phone: Repossession agent's phone number.

Assigned: Date your organization assigned the agent to repossess the vehicle.

Redemption

Redemption Date: Last date the customer has to redeem the vehicle.

Redemption Amount: Amount the customer must remit to redeem the vehicle. This amount can include past due amounts, total remainder of the debt, and any fees incurred from the repossession.

Date Released: Date your organization released the vehicle to the customer.

Redeemed by: Person who redeemed the vehicle.

Released: Method of release.

Redemption Expire Date: Date the redemption expires.

Redemption Fees

Storage Fees: Fees to store the vehicle.

Key Cut Fee: Fees to have a key cut.

Misc Fees: Miscellaneous fees related to the repossession.

Impound Fees: Fees to impound the vehicle.

Repossession Fees: Fees to repossess the vehicle

Fuel Sub Fees: Fees to fuel the vehicle.

Sale Fees: Fees to sell the vehicle.

Repair Fees: Fees to repair the vehicle.

Title Fees: Fees to title the vehicle.

Cost of Repo: Repossession costs

Storage

Date Into Storage: Date the agent placed the vehicle into storage.

Storage Location: Address where the repossessed vehicle is in storage.

Storage Comments: Comments regarding storage of the repossessed vehicle.

Transport

Transport Order Date: Date your organization requested transport of the vehicle.

Transport Arrival Date: Date the vehicle arrived at its destination.

Transport Date: Date the agent transported the vehicle.

Transport Released To: Person to whom the agent released the vehicle upon transport.

Transport Notes: Comments regarding transport of the vehicle.

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

Related Topics

Collateral

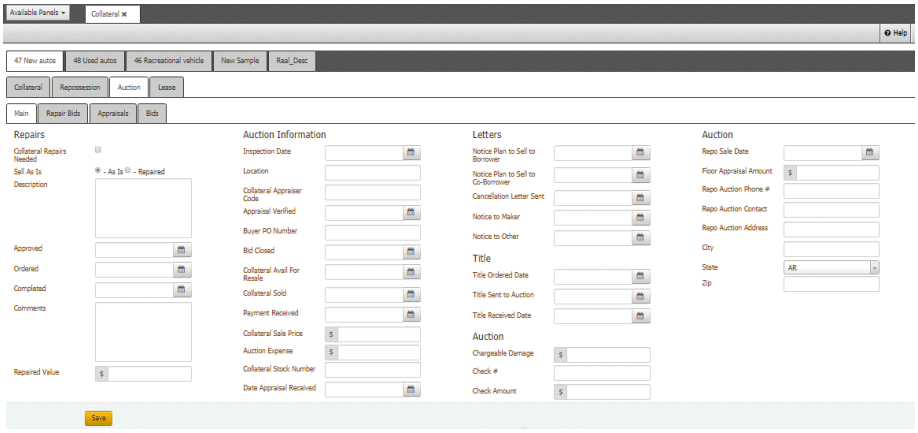
Auction

Maintain Auction Information

Use the **Main** tab on the **Auction** tab in the **Collateral** panel to maintain auction information for a vehicle.

To maintain auction information

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Collateral**.
2. Click the tab for the collateral to modify and then click the **Auction** tab and then click the **Main** tab.



Repairs

Collateral Repairs Needed: If selected, the vehicle needs repairs.

Sell as is: Indicates whether the vehicle is selling "as is" or in "repaired" condition.

Description: Description of the needed repairs.

Approved: Repair approval date.

Ordered: Repair order date.

Completed: Repair completion date.

Comments: Comments regarding the repairs.

Repaired Value: Monetary value of the vehicle after repairs.

Auction Information

Inspection Date: Date the auction house inspected the vehicle.

Location: Location of the auction house.

Collateral Appraiser Code: Code that identifies the appraiser.

Appraisal Verified: Appraisal verification date.

Buyer PO Number: Vehicle buyer's purchase order number.

Bid Closed: Date bidding on the vehicle closed.

Collateral Avail for Resale: Date the vehicle became available for resale.

Collateral Sold: Date the vehicle sold at auction.

Payment Received: Date your organization received the payment from the auction house.

Collateral Sale Price: Amount the vehicle sold for.

Auction Expense: Fees associated with auctioning the vehicle.

Collateral Stock Number: Stock number the auction house assigned to the vehicle.

Date Appraisal Received: Date your organization received the vehicle appraisal.

Letters

Notice Plan to Sell to Borrower: Date your organization sent a letter to the borrower regarding the intent to sell the vehicle.

Notice Plan to Sell to Co-Borrower: Date your organization sent a letter to the co-borrower regarding the intent to sell the vehicle.

Cancellation Letter Sent: Date your organization sent a letter to the borrower regarding cancellation of the intent to sell the vehicle.

Notice to Maker: Date your organization sent a notice to the lender regarding the intent to sell the vehicle.

Notice to Other: Date your organization sent a notice to another party regarding the intent to sell the vehicle.

Title

Title Ordered Date: Date your organization ordered the vehicle's title.

Title Sent to Auction: Date your organization sent the vehicle's title to the auction house.

Title Received Date: Date the auction house received the vehicle's title.

Auction

Chargeable Damage: Amount charged to the auction house for damage to the vehicle while in their care.

Check #: Number of the check received from the auction house.

Check Amount: Amount of the check received from the auction house.

Repo Sale Date: Date the vehicle is scheduled to sell at auction.

Floor Appraisal Amount: Appraisal amount that the auction house determined for the vehicle.

Repo Auction Phone Number: Auction house phone number.

Repo Auction Contact: Name of the contact person at the auction house.

Repo Auction Address: Address where the auction house is located.

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

Related Topics

Auction

Collateral

Repair Bids

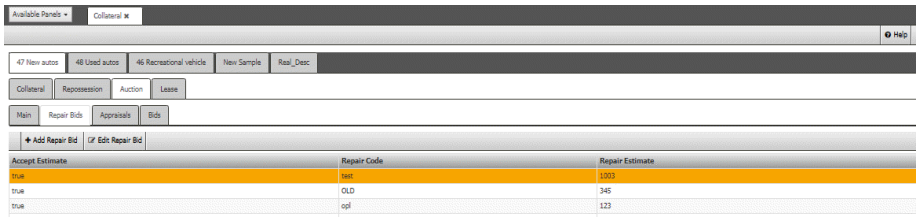
Feedback

View Repair Bids

Use the **Repair Bids** tab on the **Auction** tab in the **Collateral** panel to view bids to repair a vehicle.

To view repair bids

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Collateral**.
2. Click the tab for the collateral to modify, click the **Auction** tab, and then click the **Repair Bids** tab.



Accept Estimate: Indicates whether your organization accepted the repair estimate.

Repair Code: Code that identifies the type of repair.

Repair Estimate: Estimated cost of repair.

Related Topics

Auction

Collateral

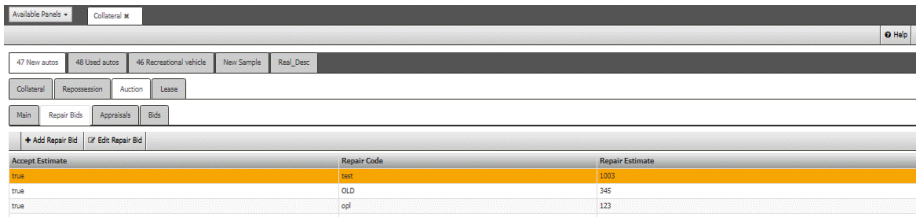
Feedback

Add a Repair Bid

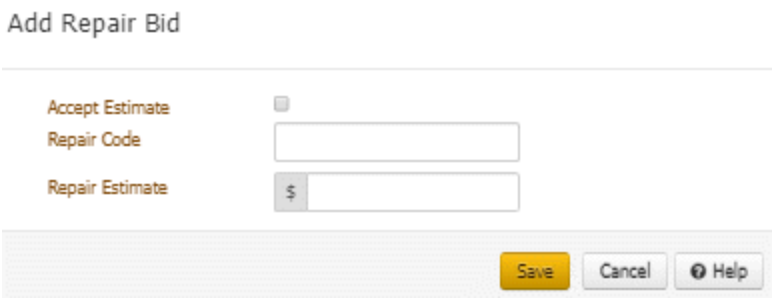
Use the **Add a Repair Bid** dialog box to add a bid to repair a vehicle.

To add a repair bid

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Collateral**.
2. Click the tab for the collateral to modify, click the **Auction** tab, and then click the **Repair Bids** tab.



3. In the **Repair Bids** toolbar, click **Add Repair Bid**.



Accept Estimate: If selected, your organization accepted the repair estimate.

Repair Code: Code that identifies the type of repair.

Repair Estimate: Estimated cost of repair.

4. Complete the information and then click **Save**.

Related Topics
Auction

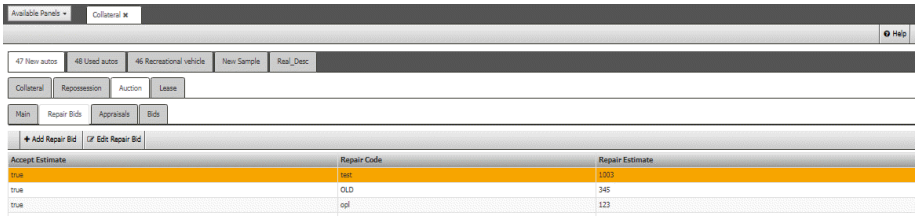
Collateral

Feedback

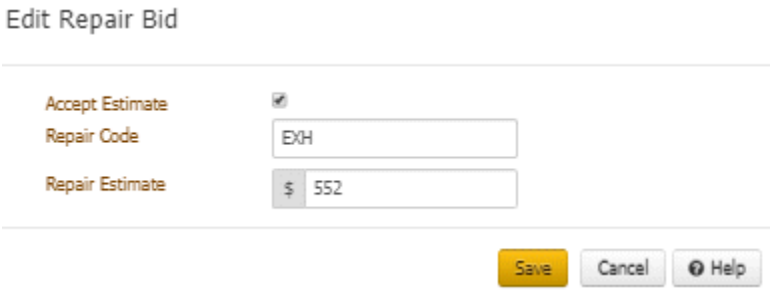
Modify a Repair Bid
Use the **Edit Repair Bid** dialog box to modify a bid to repair a vehicle.

To modify a repair bid

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Collateral**.
2. Click the tab for the collateral to modify, click the **Auction** tab, and then click the **Repair Bids** tab.



3. In the **Repair Bids** toolbar, click **Edit Repair Bid**.



Accept Estimate: If selected, your organization accepted the repair estimate.

Repair Code: Code that identifies the type of repair.

Repair Estimate: Estimated cost of repair.

4. Modify the information and then click **Save**.

Related Topics
Auction

Collateral

Appraisals

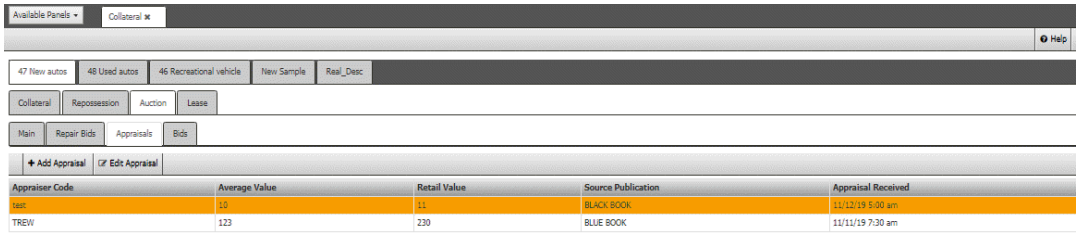
Feedback

View Appraisals

Use the **Appraisals** tab on the **Auction** tab in the **Collateral** panel to view appraisals for a vehicle.

To view appraisals

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Collateral**.
2. Click the tab for the collateral to modify, click the **Auction** tab, and then click the **Appraisals** tab.



Appraiser Code: Code that identifies the appraiser.

Average Value: Average value of the vehicle.

Retail Value: Retail value of the vehicle.

Source Publication: Source from which your organization obtained the appraisal (for example, Kelley Blue Book).

Appraisal Received: Date your organization received the appraisal.

Related Topics
Auction

Collateral

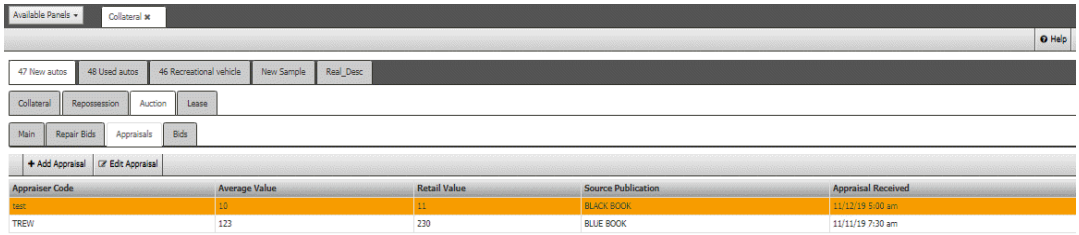
Feedback

Add an Appraisal

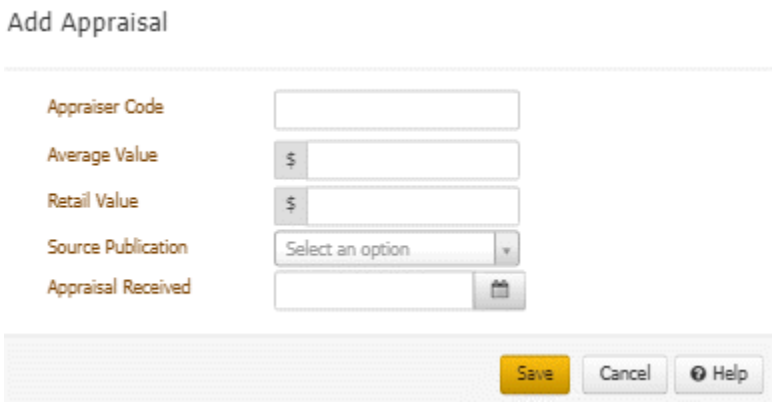
Use the **Add Appraisal** dialog box to add an appraisal of a vehicle.

To add an appraisal

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Collateral**.
2. Click the tab for the collateral to modify, click the **Auction** tab, and then click the **Appraisals** tab.



3. In the **Appraisals** toolbar, click **Add Appraisal**.



Appraiser Code: Code that identifies the appraiser.

Average Value: Average value of the vehicle.

Retail Value: Retail value of the vehicle.

Source Publication: Source from which your organization obtained the appraisal (for example, Kelley Blue Book).

Appraisal Received: Date your organization received the appraisal.

4. Complete the information and then click **Save**.

Related Topics
Auction

Collateral

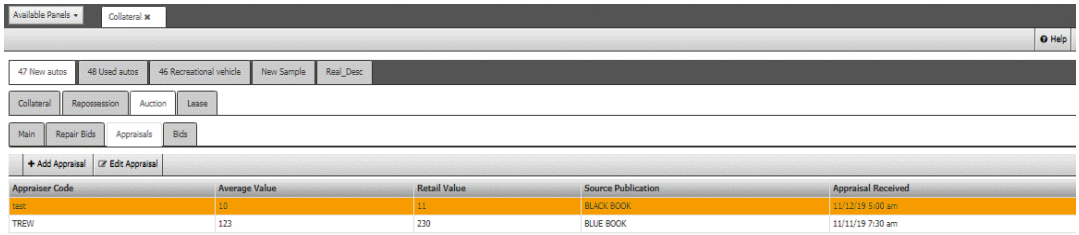
Feedback

Modify an Appraisal

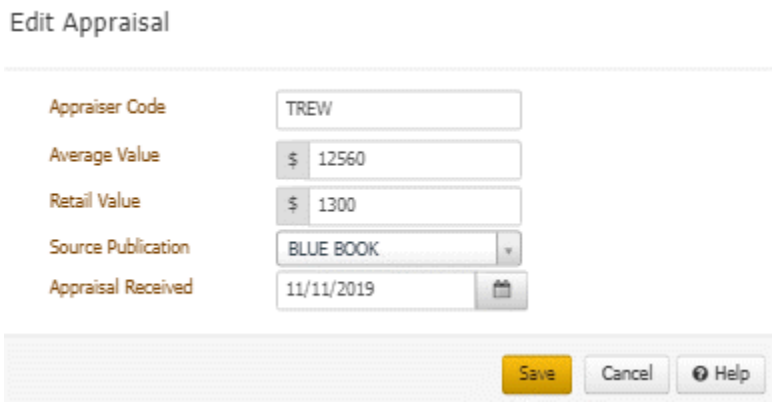
Use the **Edit Appraisal** dialog box to modify an appraisal of a vehicle.

To modify an appraisal

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Collateral**.
2. Click the tab for the collateral to modify, click the **Auction** tab, and then click the **Appraisals** tab.



3. In the **Appraisals** toolbar, click **Edit Appraisal**.



Appraiser Code: Code that identifies the appraiser.

Average Value: Average value of the vehicle.

Retail Value: Retail value of the vehicle.

Source Publication: Source from which your organization obtained the appraisal (for example, Kelley Blue Book).

Appraisal Received: Date your organization received the appraisal.

4. Modify the information and then click **Save**.

Related Topics
Auction

Collateral

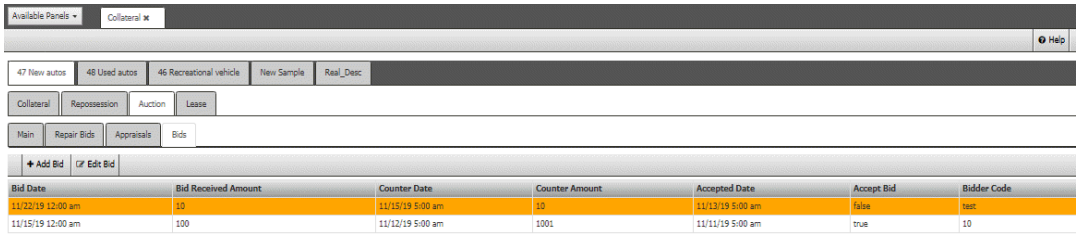
Purchase Bids

View Purchase Bids

Use the **Bids** tab on the **Auction** tab in the **Collateral** panel to view bids to purchase a vehicle.

To view purchase bids

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Collateral**.
2. Click the tab for the collateral to modify, click the **Auction** tab, and then click the **Bids** tab.



Accept Bid: Indicates whether your organization accepted the bid.

Bidder Code: Code that identifies the bidder.

Bid Amount: Amount of the bid.

Bid Date: Date the buyer placed the bid.

Related Topics
Auction

Collateral

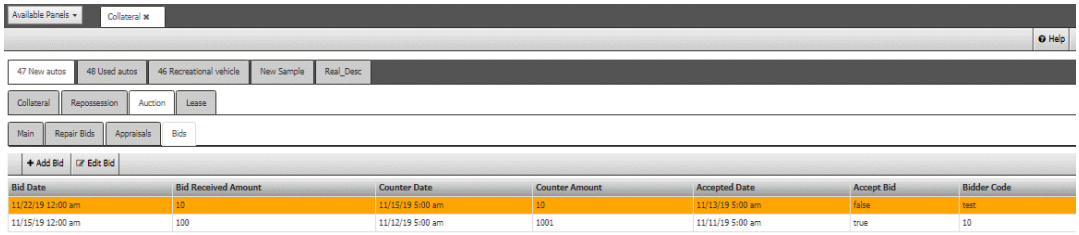
Feedback

Add a Purchase Bid

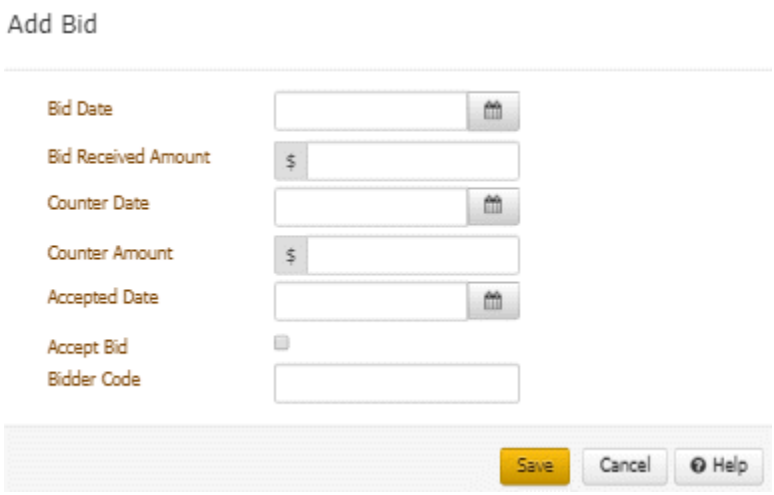
Use the **Add Bid** dialog box to add a bid to purchase a vehicle.

To add a purchase bid

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Collateral**.
2. Click the tab for the collateral to modify, click the **Auction** tab, and then click the **Bids** tab.



3. In the **Bids** toolbar, click **Add Bid**.



Bid Date: Date the buyer placed the bid.

Bid Received Amount: Amount of the bid.

Counter Date: Date your organized made a counter offer.

Counter Amount: Amount of the counter offer.

Accepted Date: Date your organization accepted the bid.

Accept Bid: If selected, your organization accepted the bid.

Bidder Code: Code that identifies the bidder.

4. Complete the information and then click **Save**.

Related Topics
Auction

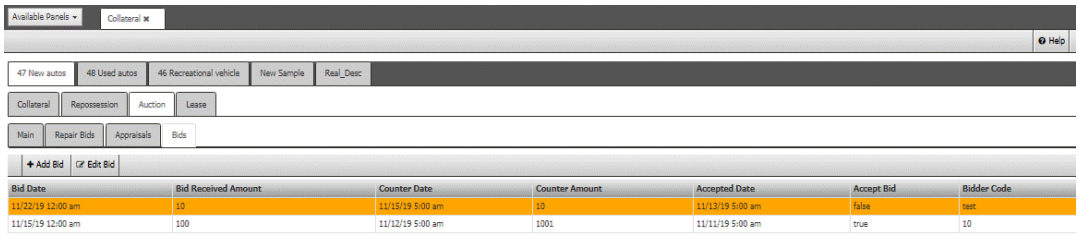
Collateral

Feedback

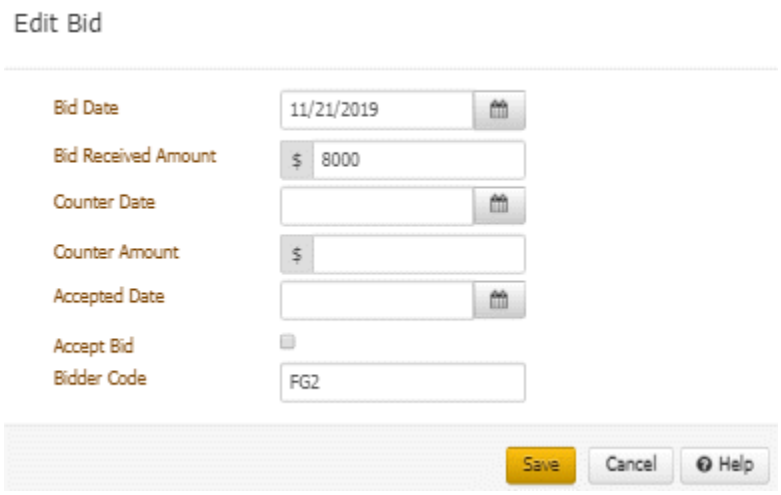
Modify a Purchase Bid
Use the **Edit Bid** dialog box to modify a bid to purchase a vehicle.

To modify a purchase bid

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Collateral**.
2. Click the tab for the collateral to modify, click the **Auction** tab, and then click the **Bids** tab.



3. In the **Bids** toolbar, click **Edit Bid**.



Bid Date: Date the buyer placed the bid.

Bid Received Amount: Amount of the bid.

Counter Date: Date your organized made a counter offer.

Counter Amount: Amount of the counter offer.

Accepted Date: Date the buyer accepted the counter offer.

Accept Bid: If selected, your organization accepted the bid.

Bidder Code: Code that identifies the bidder.

4. Complete the information and then click **Save**.

Related Topics
Auction

Collateral

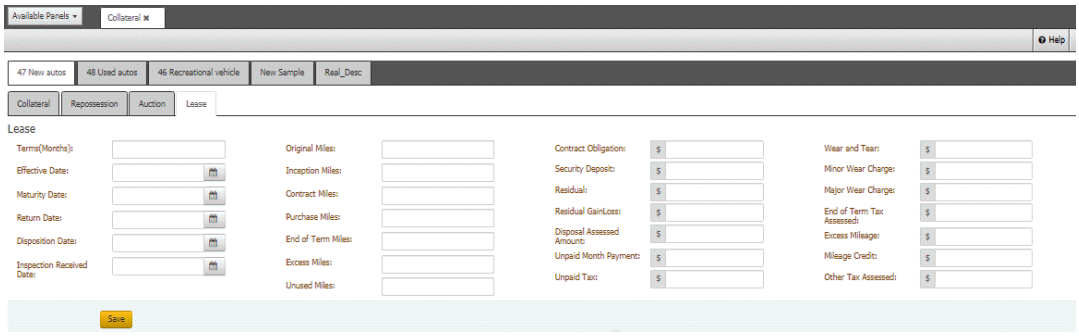
Feedback

Maintain Lease Information

Use the **Lease** tab in the **Collateral** panel to maintain lease information for a vehicle.

To maintain lease information

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Collateral**.
2. Click the tab for the collateral to modify and then click the **Lease** tab.



Term (Months): Length of the lease, in months.

Effective Date: Date the lease became effective.

Maturity Date: Date the lease matured.

Return Date: Date the leasing agency received the vehicle.

Disposition Date: Date the leasing agency determined the status of the returned vehicle.

Inspection Received Date: Date the leasing agency inspected the vehicle.

Original Miles: Original mileage on the leased vehicle.

Inception Miles: Mileage at the beginning of the lease term.

Contract Miles: Mileage allowed under the leasing contract.

Purchase Miles: Number of extra miles purchased.

End of Term Miles: Mileage at the end of the lease term.

Excess Miles: Number of miles over the contract and purchased miles.

Unused Miles: Number of unused contract and purchased miles.

Contract Obligation: Total amount due under the lease agreement. This amount excludes the security deposit, sales tax, and any other fees and taxes paid to a third party.

Security Deposit: Amount the lessee paid as a security deposit.

Residual: Lease-end value of the vehicle.

Residual Gain/Loss: Difference between the residual value and the end-of-lease purchase price.

Disposal Assessed Amount: Amount charged to dispose of the vehicle.

Unpaid Month Payment: Number of months during the lease term that the lessee did not make a payment.

Unpaid Tax: Amount in unpaid taxes that the lessee owes.

Wear and Tear: Total amount charged for wear and tear on the vehicle.

Minor Wear Charge: Amount charged for minor wear on the vehicle.

Major Wear Charge: Amount charged for major wear on the vehicle.

End of Term Tax Assessed: Tax assessed at the end of the lease.

Excess Mileage: Amount charged for each mile over the mileage limit.

Mileage Credit: Amount credited for unused mileage.

Other Tax Assessed: Amount charged for other taxes (for example, property tax).

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

Related Topics

Collateral

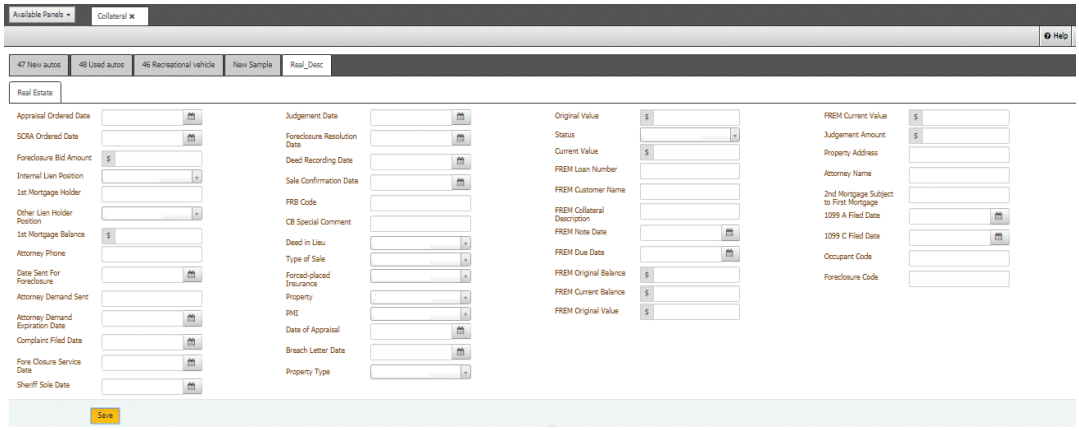
Feedback

Maintain Real Estate Collateral

Use the **Real Estate** tab in the **Collateral** panel to maintain collateral information for real estate properties.

To maintain real estate collateral

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Collateral**.
2. Click the tab for the collateral to modify. The **Real Estate** tab appears.



Appraisal Ordered Date: Date the lender ordered an appraisal of the property.

SCRA Ordered Date: Date the lender obtained a court order to foreclose on the property as required under the Servicemembers Civil Relief Act.

Foreclosure Bid Amount: Amount the lender bid on the property at the foreclosure sale.

Internal Lien Position: Your organization's position in line in regard to benefitting from collateral liquidation. The senior position is first in line to benefit.

1st Mortgage Holder: Lender who holds the first mortgage.

Other Lien Holder Position: Position in line of other lien holders in regard to benefitting from collateral liquidation. The senior position is first in line to benefit.

1st Mortgage Balance: Balance due on the first mortgage.

Attorney Phone: Phone number of the lender's attorney.

Date Sent for Foreclosure: Date the lender sent the paperwork to the attorney to start the foreclosure process.

Attorney Demand Sent: Date the attorney sent notice to the borrower demanding that the borrower return the loan to good standing.

Attorney Demand Expiration Date: Date the demand notice expires. If the borrower doesn't pay the amount specified in the demand letter, the lender starts the foreclosure process.

Complaint filed Date: Date the lender's attorney filed a complaint for foreclosure with the court.

Foreclosure Service Date: Date the court served the borrower with the complaint for foreclosure document and a summons.

Foreclosure Sale Date: Date the sheriff scheduled an auction to sell the property.

Sequence: Client internal identifier for each piece of collateral.

Judgment Date: Date the court entered a final judgment of foreclosure against the borrower.

Foreclosure Resolution Date: Date the lender recovered the balance of the loan by forcing the sale of the asset used as collateral for the loan.

Deed Recording Date: Date the recorder or clerk recorded the sheriff's deed.

Sale Confirmation Date: Date the court approved the terms, price, and conditions of the sale.

FRB Code: Code that identifies the Federal Reserve Bank in which the lender is a member.

CB Special Comment: Credit Bureau special comment.

Deed in Lieu: Indicates whether the borrower conveyed all interest in the property to the lender to satisfy the loan and avoid foreclosure proceedings.

Type of Sale: Indicates whether the foreclosure sale is judicial (through a court process) or non-judicial (without a court's involvement).

Forced-placed Insurance: Indicates whether the lender placed an insurance policy on the property.

Property: Property occupancy, such as vacant or occupied.

PMI: Indicates whether the borrower has private mortgage insurance on the property loan.

Date of Appraisal: Date an appraiser appraised the property.

Breach Letter Date: Date the lender sent a breach letter to the borrower to notify the borrower that the loan is in default.

Property Type: Type of property, such as single family residence or raw land.

Original Value: Original appraised value of the property.

Status: Current status of the property.

Current Value: Current appraised value of the property.

FREM Loan Number: Number that First Real Estate Mortgage assigned to identify the loan.

FREM Customer Name: Name of the First Real Estate Mortgage customer.

FREM Collateral Description: Description of the First Real Estate Mortgage loan collateral.

FREM Note Date: Date the borrower signed the First Real Estate Mortgage note.

FREM Due Date: Date the First Real Estate Mortgage loan payment is due.

FREM Original Balance: Original First Real Estate Mortgage loan balance.

FREM Current Balance: Current First Real Estate Mortgage loan balance.

FREM Original Value: First Real Estate Mortgage's original appraised value of the property.

FREM Current Value: First Real Estate Mortgage's current appraised value of the property.

Judgment Amount: Total amount that the court awarded to the lender.

Property Address: Property's house number, street, city, state, and ZIP code.

Attorney Name: Name of the borrower's attorney.

2nd Mortgage Subject to First Mortgage: Indicates whether the borrower has a second mortgage on the property.

1099 A Filed Date: Date the lender filed a 1099-A with the IRS for the property foreclosure.

1099 C Filed Date: Date the lender filed a 1099-C with the IRS for the acquisition of the secured property (or the debtor's abandonment of the property) and cancellation of the debt.

Occupant Code: Code that identifies the property's usage.

Foreclosure Code: Code that identifies the foreclosure type.

Communication

Communication

Use the **Communication** panel to view historical communication for the account. If a call has an audio recording associated to it, you can play the recording. If a letter has a file associated to it, you can view the letter.

Available communications are:

- Outbound call initiated manually within Latitude or through a desktop phone
- Outbound call initiated through a Dialer calling list
- Inbound call from the customer delivered through the Dialer or a desktop phone
- Written communication or electronic message, such as:
    - Outbound letter/Email/SMS sent from within Latitude.
    - Outbound letter/Email/SMS sent from outside Latitude that a user attached to the account.
    - Inbound Email/SMS received from a party.
    - Inbound document that a user attached to the account

Related Topics

View Account Communications

Play a Call Recording

View a Sent Letter

View Interaction Details for a Communication

Reference Panels Permission

Reference Panels

Data Grids

View Account Communications

Use the **Communication** panel to view communication activities associated to the account.

To view account communications

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Communication**.

Filter by:

Type: If selected, only displays communications that match the specified communication type.

Party: If selected, only displays communications for the specified party.

Clear Filters: Clears the specified filters and displays all communications.

Date: Date and time the communication occurred. To change the sort order, click the arrow in the Date column heading.

User: ID and name of the user associated to the communication.

Type: Type of communication.

Party: Name of the party who received the communication from or sent the communication to your organization.

Description: Description of the communication.

2. To filter communications, do the following:

   - To display communications for a specific communication type, in the **Type** box in the **Communication** panel toolbar, click the communication type. Only communications that match the specified type appear in the panel.

   - To display communications for a specific party, in the **Party** box in the **Communication** panel toolbar, click the party. Only communications for the specified party appear in the panel.

Tip: To clear the filter and display all communications, click **Clear Filters**.

Related Topics

Data Grids

Communication

Play a Call Recording

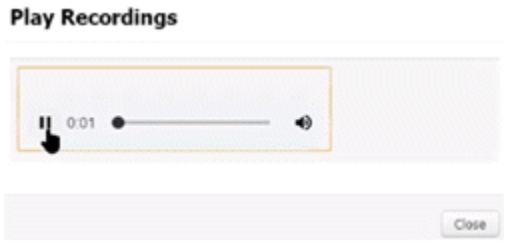
Use the **Play Recordings** dialog box to play an audio recording of a call. A tone within a recording marks the place where the recording paused.

To play a call recording

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Communication**.

   If a call has a recording associated to it, a Folder image appears in the **Type** column.

2. In the data grid, click the communication to play and then click **Play/View**. The **Play Recordings** dialog box appears.



3. When finished, click **Close**.

Related Topics

Data Grids

Communication

View a Sent Letter

Use the **Communication** panel to view a letter that a user sent to a party on the account. If a user didn't save the letter output when sending the letter, the option to view the letter file isn't available.

To view a sent letter

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Communication**.

   If a sent letter has an output file associated to it, a Folder image appears in the **Type** column.

2. In the data grid, click the letter to view and then click **Play/View**. The letter appears minimized beneath the status bar.

3. Click the letter to open it in the associated program (for example, Word or Adobe Acrobat Reader).

Related Topics

Data Grids

Communication

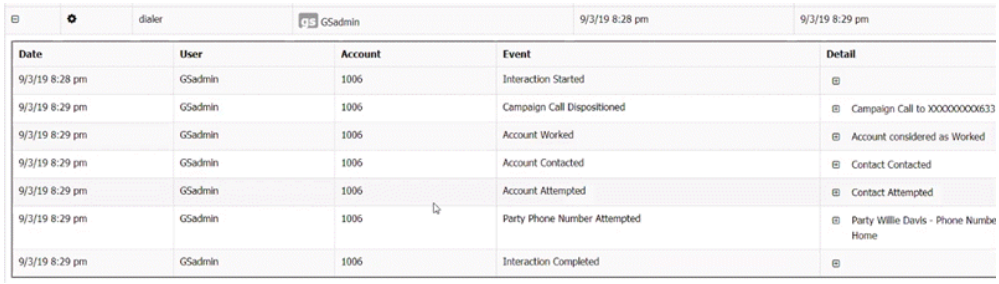
View Interaction Details for a Communication

Use the **Interactions** panel to view the interaction details associated to a communication regarding the account.

To view interaction details for a communication

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Communication**.

2. In the data grid, click the communication and then click **Interaction**. The **Interactions** panel opens to the entry associated to the communication.



Related Topics

Data Grids

Communication

Compliance

Compliance

Use the **Compliance** panel to view Attempts/Conversations, Validation Notice, Itemization details, and Preferred Time to call information.

Related Topics

View Attempts/Conversations

View Validation Notice Details

View Itemization Details

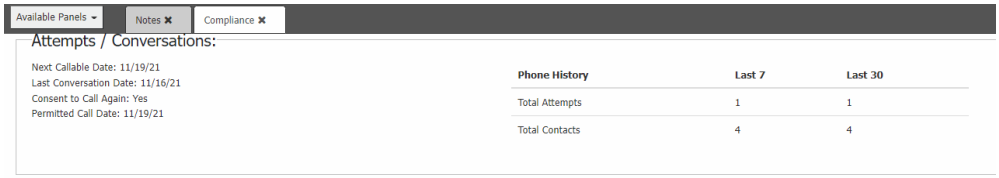
View Preferred Time To Call Details

View Attempts/Conversations

Use the **Compliance** panel to view the call attempts or conversations.

To view attempts or conversations, do the following:

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Compliance**. The **Attempts/Conversations** appears.



Next Callable Date: Next call date

Last Conversation Date: Date of last call conversation

Consent to Call Again: Yes means to call again, and No means not to call again.

Permitted Call Date: Date when call be received

Phone History: Call Attempts and number of contacts details

Related Topics

Compliance

View Validation Notice Details

View Itemization Details

View Preferred Time To Call Details

View Validation Notice Details

Use the **Compliance** panel to view the validation notices details.

To view validation notice details, do the following:

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Compliance**. The **Validation Notices** appears.

Date Sent: Validation sent date

Notice Status: Validation notice status

Period Expires: Validation expiry details

Notice Type: Validation notice type

Validation Period Completed: True if completed and False if not

Related Topics

Compliance

View Attempts/Conversations

View Itemization Details

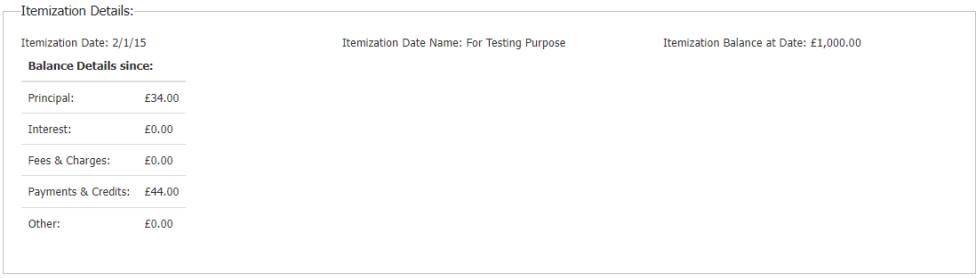
View Preferred Time To Call Details

View Itemization Details

Use the **Compliance** panel to view the validation notices details.

To view itemization details, do the following:

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Compliance**. The **Itemization** appears.



Itemization Date: Date of itemization.

Balance Details: Consists of principal, interest, fees & charges, payments & credits, and other details.

Total Balance at Date: Complete total balance remaining.

Itemization Date Name: Name of itemization.

Related Topics

Compliance

View Attempts/Conversations

View Validation Notice Details

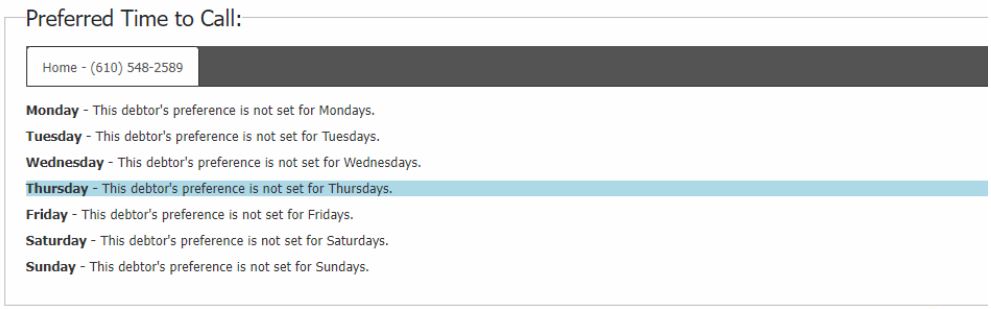
View Preferred Time To Call Details

View Preferred Time To Call Details

Use the **Compliance** panel to view the call attempts or conversations.

To view preferred time to call details, do the following:

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Compliance**. The **preferred time to call details** appears.



Displays debtor preference call days for entire week.

Related Topics

Compliance

Modify an Account Phone Number

View Attempts/Conversations

View Validation Notice Details

View Itemization Details

Credit Bureau Reporting

Credit Bureau Reporting

Use the **CB Reporting** panel to view pending and historical credit bureau reporting information for the responsible parties on the account. You can also manage reporting of accounts to credit bureaus.

Reporting files

Latitude credit reporting files are in compliance with the Metro2 reporting guidelines.

- Metro2 file is in 426 character format, variable length.
- Responsible parties are in the J2 segments of the Metro2 file.
- Original creditor information is in the K1 segment of the Metro2 file.

Reporting options

Depending on your system configuration, you can:

- Report principal only, instead of the total account balance.
- Report responsible parties, instead of just the primary customer on the account.
- Extend the reporting of an account beyond the configured wait days. This feature allows you to suspend reporting while you are in negotiations with a customer.
- Flag returned accounts for deletion from the credit bureaus.
- Assign an original creditor to accounts for reporting instead of using customer or client setting.

Related Topics

Configure a Responsible Party for Reporting

View Credit Bureau Reporting Summary

View Credit Bureau Reporting Account Information

View Credit Bureau Reporting Audit Trail

Report an Account to Credit Bureaus

Credit Bureau Reporting Codes

Delay Reporting an Account to Credit Bureaus

Evaluate an Account for Credit Reporting

Remove a Responsible Party From Credit Bureau Reporting

Send Delete Request for Account Reported in Error

Send Delete Request for Account Reported Based on Fraud

Send Delete Request for Medical Account

Undo a Credit Reporting Delete Request

Alter Credit Reporting Settings Permission

Reference Panels Permission

Reference Panels

Feedback

Configure a Responsible Party for Credit Reporting

To include a responsible party in credit bureau reporting, the system requires certain settings.

To configure a responsible party for credit reporting

1. On the **Contact Information** tab in the **Customer** panel, ensure that the responsible party to report has the following settings:
    - **Relation to Account** list box is set to "Debtor" for the primary responsible party and "Co-debtor" for secondary responsible parties.
    - **Is Responsible** box is set to "Yes" or the check box is selected.
    - **National ID** box is populated with a valid social security number.
2. On the **Address** panel, ensure that the responsible party to report has the following settings:
    - **Type of Address** list box is set to "Home."
    - **Status of Address** list box is set to "Good."
    - **Active** check box is selected.
    - **Primary** check box is selected.

- **Correspondence** check box is selected.
- **Address Line 1**, **City/Town**, **State**, and **Post Code** boxes have a valid address.

3. On the **Customer Configuration** pane in Credit Bureau Reporting Console, ensure that **Include codebtors** check box is selected.

Related Topics

Credit Bureau Reporting

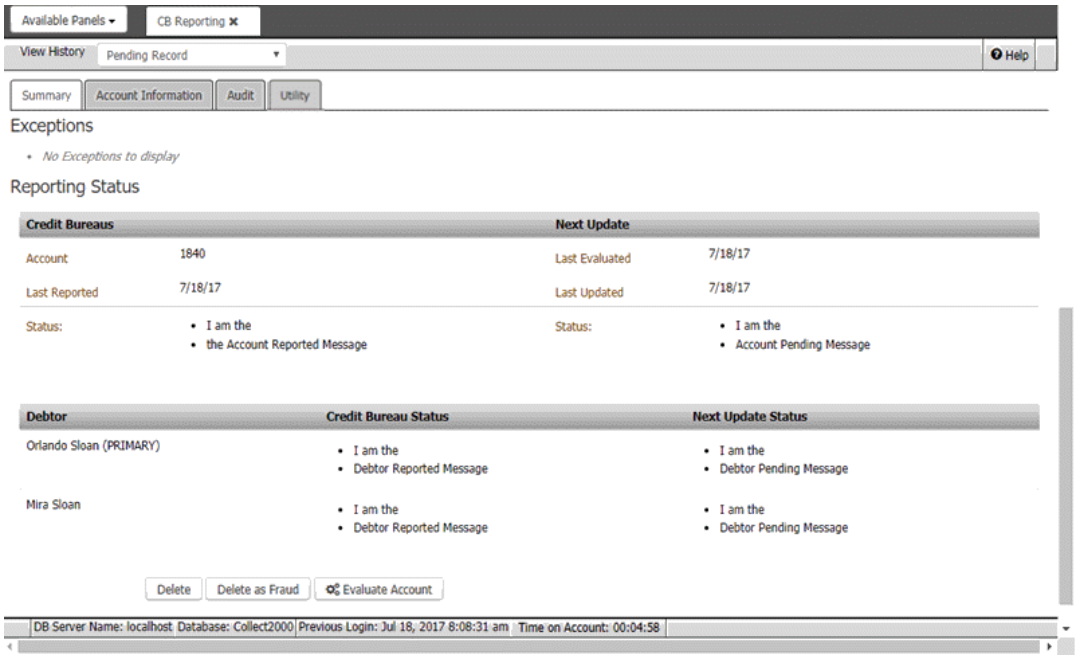
Feedback

View Credit Bureau Reporting Summary

Use the **Summary** tab on the **CB Reporting** panel to view pending and historical credit bureau reporting summary for a responsible party on the account.

To view credit bureau reporting summary

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **CB Reporting**.
2. Click the **Summary** tab.



Exceptions

Debtor: Unique code that identifies the customer on the account. This value displays for debtor exception types only.

Description: Description of the exception.

Reporting Status

Note: If insurance is paying or paid the medical debt in full, the message, "Prevent Flag is ON," appears in this section.

Account: Code that Latitude assigned to identify the account.

Last Reported: Date your organization last reported the account to the credit bureaus.

Status: Status of the last report to the credit bureaus.

Last Evaluated: Last date the system evaluated the account for credit bureau reporting purposes.

Last Updated: Date the system or a user last updated the account.

Status: Status of the next report to the credit bureaus.

Debtor: Name of the customer on the account. If the customer is the primary party on the account, the system displays "(PRIMARY)" next to the customer's name.

Credit Bureau Status: Status of the last report to the credit bureaus.

Next Update Status: Status of the next report to the credit bureaus.

3. In the **View History** list box, click the type of record to view (pending or historical).

Related Topics

Credit Bureau Reporting

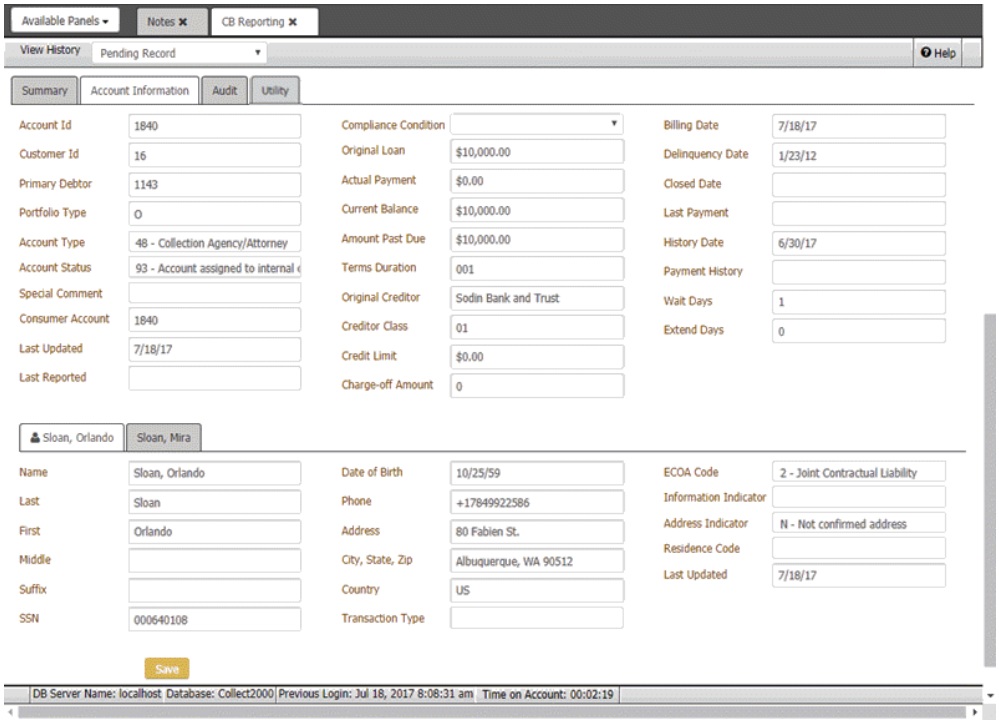
Feedback

View Credit Bureau Reporting Account Information

Use the **Account Information** tab on the **CB Reporting** panel to view pending and historical credit bureau reporting information for a responsible party on the account.

To view credit bureau reporting account information

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **CB Reporting**.
2. Click the **Account Information** tab.



View History: Type of credit bureau reporting information to display.

Account ID: Code that the system assigned to identify the account.

Customer ID: Code that identifies the client on the account.

Primary Debtor: Code that identifies the primary customer on the account.

Portfolio Type: Code that identifies the portfolio to which the account belongs. For more information, see Portfolio Types.

Account Type: Code that identifies the account type, such as collection agency or business credit card. For more information, see Account Types.

Account Status: Code that identifies the reporting status of the account, such as assigned to internal or external collections. For more information, see CBR Account Status Codes.

Special Comment: Code that identifies a note about the account, such as "debt paid through insurance." For more information, see Special Comment Codes.

Consumer Account: Code that the client assigned to identify the account.

Last Updated: Date the system or a user last updated the account.

Last Reported: Date the system or a user last reported the account to a credit bureau.

Compliance Condition: Code that identifies the compliance condition, such as "account information disputed by consumer under FCRA." For more information, see Compliance Condition Codes.

Original Loan: Original loan amount.

Actual Payment: Monthly payment amount.

Current Balance: Current balance on the account.

Amount Past Due: Amount of the current balance that is past due.

Terms Duration: Terms for repayment of the account, such as number of months.

Original Creditor: Original creditor assigned to the account.

Creditor Class: Class of business assigned to the account for reporting to credit bureaus. For more information, see Creditor Classification Code.

Credit Limit: Maximum credit amount granted to the customer.

Charge-off Amount: Amount of the customer's debt that the client charged off.

Billing Date: Date the client billed the customer.

Delinquency Date: Date the account became delinquent.

Closed Date: Date the system or a user closed the account.

Last Payment: Amount the customer last paid on the account.

History Date: Date the system posted the payment history.

Payment History: Payment history codes that identify the monthly payment status for the past 24 months (for example, 30 days late).

Wait Days: Number of days to wait after receiving an account before reporting it to the credit bureaus.

Extend Days: Number of days to delay reporting an account to the credit bureaus.

[Name] tab: Displays a separate tab for each reported party on the account. The first tab with the Person icon is the primary party on the account.

Name: Party's full name.

Last: Party's last name.

First: Party's first name.

Middle: Party's middle name.

Suffix: Party's name suffix.

SSN: Party's Social Security Number.

Date of Birth: Party's date of birth.

Phone: Party's phone number.

Address: Party's street address.

City, State, Zip: Party's city, state, and postal code.

Country: Country where the party resides.

Transaction Type: Code that identifies the type of account transaction, along with a description. If you can't see the entire description, rest your mouse on the **Transaction Type** box. For more information, see Transaction Types.

ECOA Code: Equal Credit Opportunity Act code that identifies who is responsible for repayment of the debt, such as individual or joint. For more information, see ECOA Codes.

Information Indicator: Credit bureau consumer information indicator, such as reaffirmation of debt or petition for Chapter 7 bankruptcy.

Address Indicator: Type of address, such as home, business, or military. For more information, see Address Indicator.

Residence Code: Residence status, such as owns or rents. For more information, see Residence Codes.

Last Updated: Date of the last update on the account.

Tip: To view the entire contents of a box when they aren't visible (for example, **Account Status**), rest your mouse on the box.

3. In the **View History** list box, click the type of record to view (pending or historical).
4. To view another party on the account, click the tab that corresponds to the party's name.
5. To modify the compliance condition, in the **Compliance Condition** list box, click the condition and then click **Save**.

Related Topics

Credit Bureau Reporting

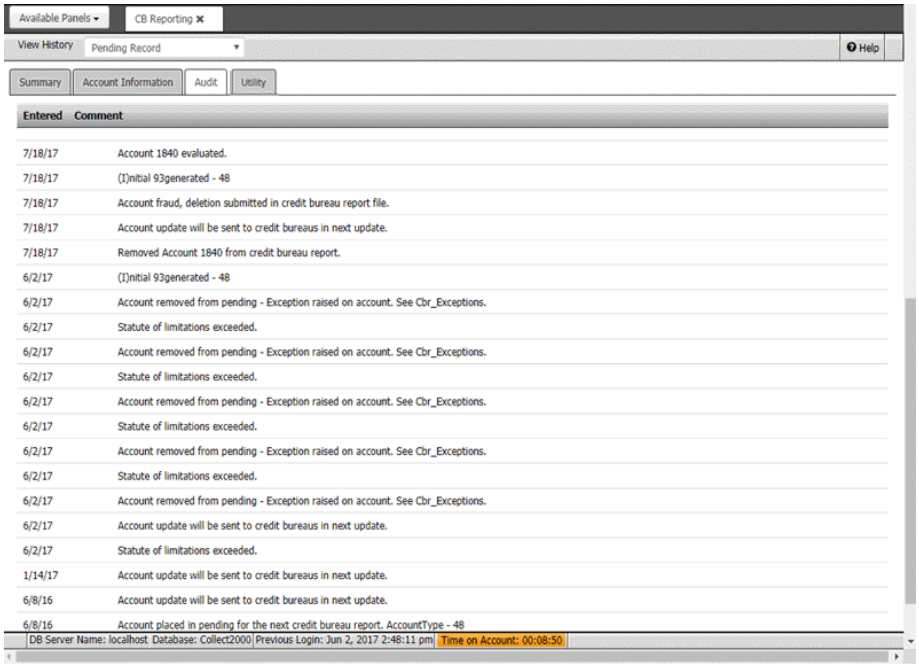
Feedback

View Credit Bureau Reporting Audit Trail

Use the **Audit** tab on the **CB Reporting** panel to view the credit bureau reporting audit trail for the account.

To view the credit bureau reporting audit trail

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **CB Reporting**.
2. Click the **Audit** tab.



Entered: Date the system added the audit record.

Comment: Description of the audit trail entry. If this box includes the message, "See Cbr_Exceptions," the system added details to the CBR_Exceptions table. For assistance with viewing the table, see your System Administrator.

Related Topics

Credit Bureau Reporting

Feedback

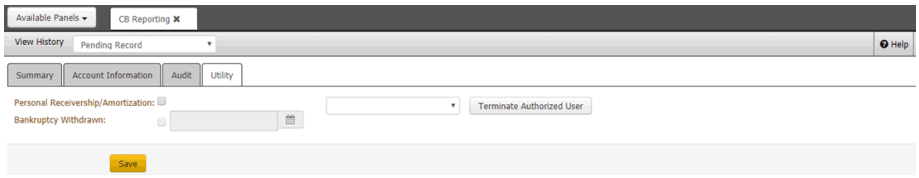
Manage Miscellaneous CBR Settings

Use the **Utility** tab on the **CB Reporting** panel to manage miscellaneous credit bureau reporting settings for the account. You can specify whether an account is under a voluntary debt repayment plan filed in Wisconsin (Chapter 128) and whether the customer withdrew a filed bankruptcy. For first-party accounts, you can remove an authorized party from the account entirely. An authorized party has authorization from the primary customer to use a credit card or other device. You must have the Utility Tab permission.

To manage miscellaneous CBR settings

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **CB Reporting**.

2. Click the **Audit** tab.



Personal Receivership/Amortization: If selected, the account is under a voluntary debt repayment plan filed in Wisconsin (Chapter 128).

Bankruptcy Withdrawn: If selected, the customer withdrew a filed bankruptcy. This check box only appears for accounts reported to the credit bureaus as a bankruptcy.

[Bankruptcy Withdrawn Date]: Date the customer withdrew the filed bankruptcy. This box only appears for accounts reported to the credit bureaus as a bankruptcy.

[Authorized User Name]: List of authorized users on the account.

Terminate Authorized User: Removes an authorized party and all the party's information from the account. This option only appears for first-party accounts that have an authorized party on the account.

3. To modify the personal receivership/amortization, do one of the following:

   - If the account is under a voluntary debt repayment plan filed in Wisconsin (Chapter 128), select the **Personal Receivership/Amortization** check box.
   - If the account is no longer under a voluntary debt repayment plan filed in Wisconsin (Chapter 128), clear the **Personal Receivership/Amortization** check box.

4. If the account reported to the credit bureaus as a bankruptcy and the customer withdrew the bankruptcy, do the following:

a. Select the **Bankruptcy Withdrawn** check box.

b. In the **[Bankruptcy Withdrawn Date]** box, specify the date the customer withdrew the bankruptcy.

5. To remove an authorized user from the account, do the following:

a. In the **[Authorized User Name]** drop-down, click the name of the authorized user to remove from the account.

b. Click **Terminate Authorized User**. The system removes the authorized user and all the user's information from the account.

Related Topics

Credit Bureau Reporting

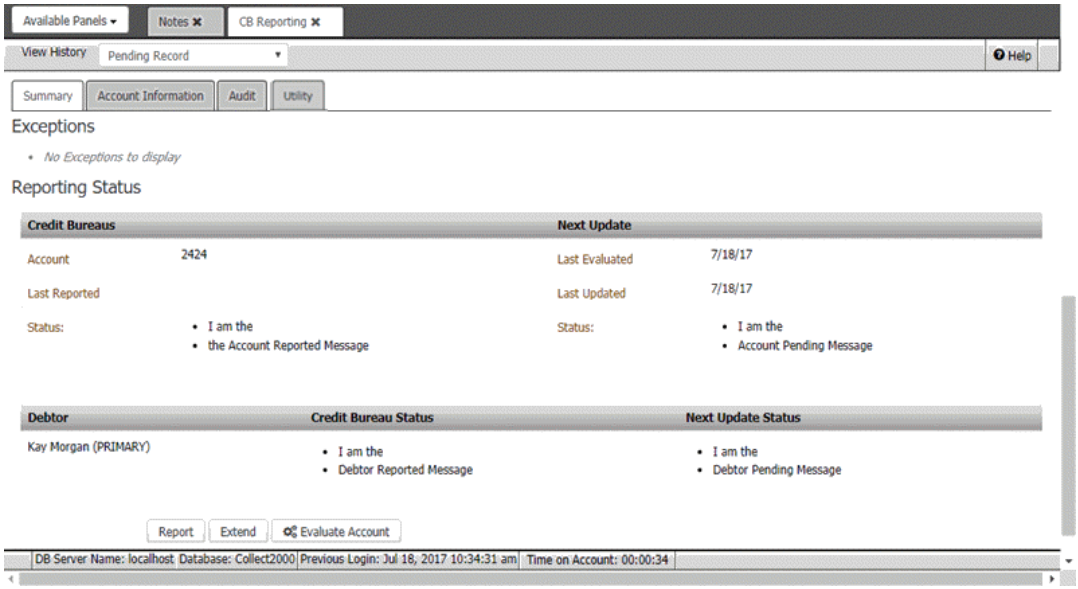
Feedback

Report an Account to Credit Bureaus

Use the **Summary** tab on the **CB Reporting** panel to report the account to credit bureaus when a report is not due. When reporting accounts to credit bureaus, ensure that your organization is in compliance with Federal and State laws regarding credit reporting.

To report an account to credit bureaus

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **CB Reporting**.
2. Click the **Summary** tab.



3. Click **Report**. The system includes the account in the next file that you create and send to the credit bureaus.

Related Topics

Credit Bureau Reporting

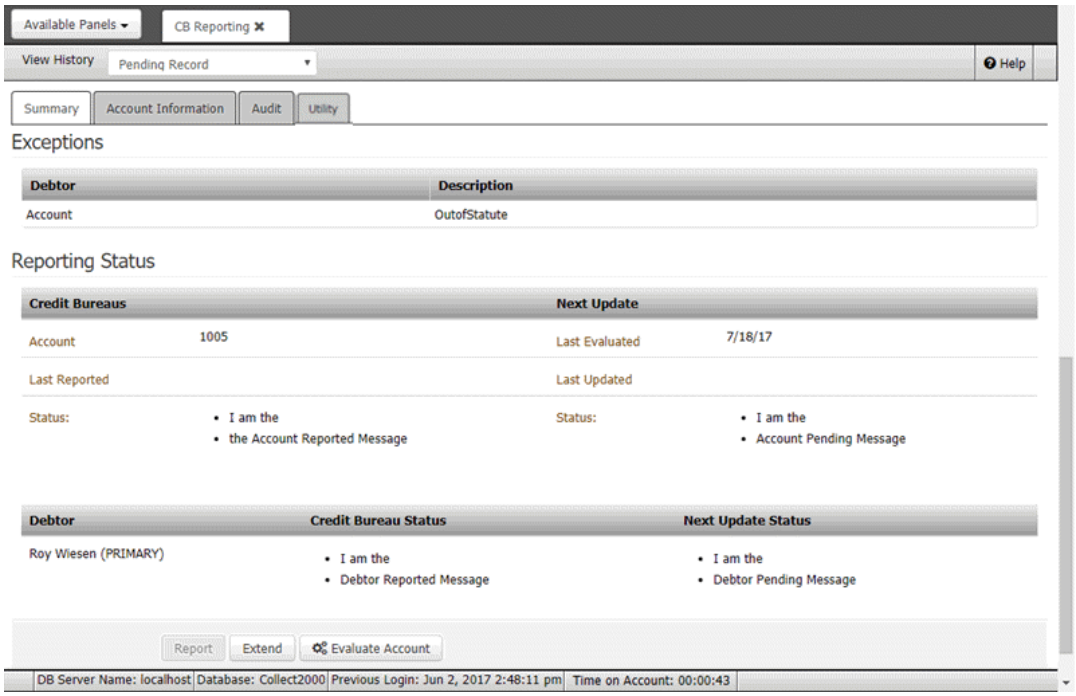
Feedback

Delay Reporting an Account to Credit Bureaus

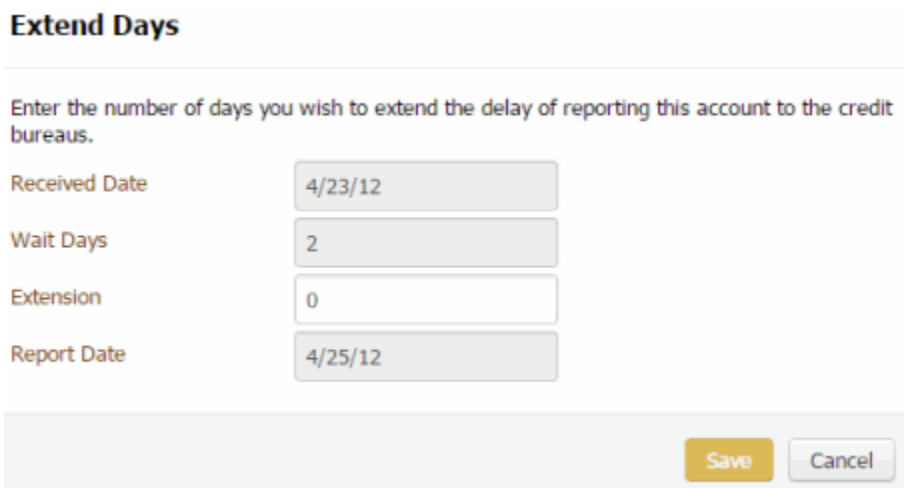
Use the **Extend Days** dialog box to extend the number of days to delay reporting the account to credit bureaus. This option is available when reporting an account for the first time only.

To delay reporting an account to credit bureaus

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **CB Reporting**.
2. Click the **Summary** tab.



3. Click **Extend**.



Received Date: Date your organization received the account.

Wait Days: Number of days after receiving the account to wait before reporting the account to the credit bureaus.

Extension: Number of days beyond the "wait days" to delay reporting the account to the credit bureaus.

Report Date: Date to report the account to the credit bureaus.

4. In the **Extension** box, type the number of days beyond the "wait days" to delay reporting.
5. Click **OK**.

Related Topics

Credit Bureau Reporting

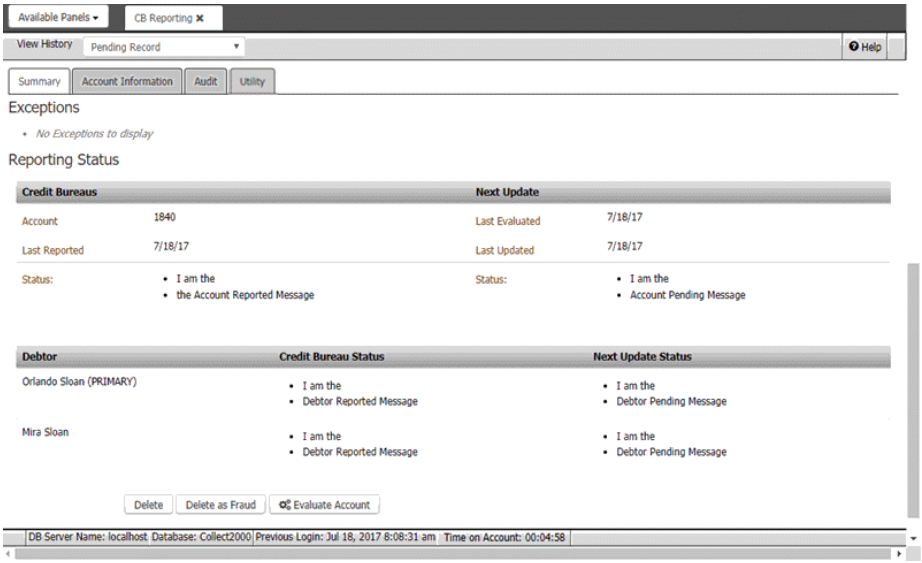
Evaluate an Account for Credit Reporting

Use the **Summary** tab in the **CB Reporting** panel to evaluate the account for credit bureau reporting purposes. This process evaluates the account for actions such as a user included a responsible party in reporting or flagged a responsible party as deceased. You must have the Allow Manual Evaluation Permission.

Note: If you have a large database, this process is time-consuming so use it sparingly. Keep in mind that Custodian also runs this process automatically each night so you may want to skip the manual evaluation.

To evaluate an account for credit reporting

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **CB Reporting**.
2. Click the **Summary** tab.



3. Click **Evaluate Account**. The system displays a message indicating that the evaluation started. When finished, it displays a message indicating that the evaluation completed.

Related Topics

Credit Bureau Reporting

Allow Manual Evaluation Permission

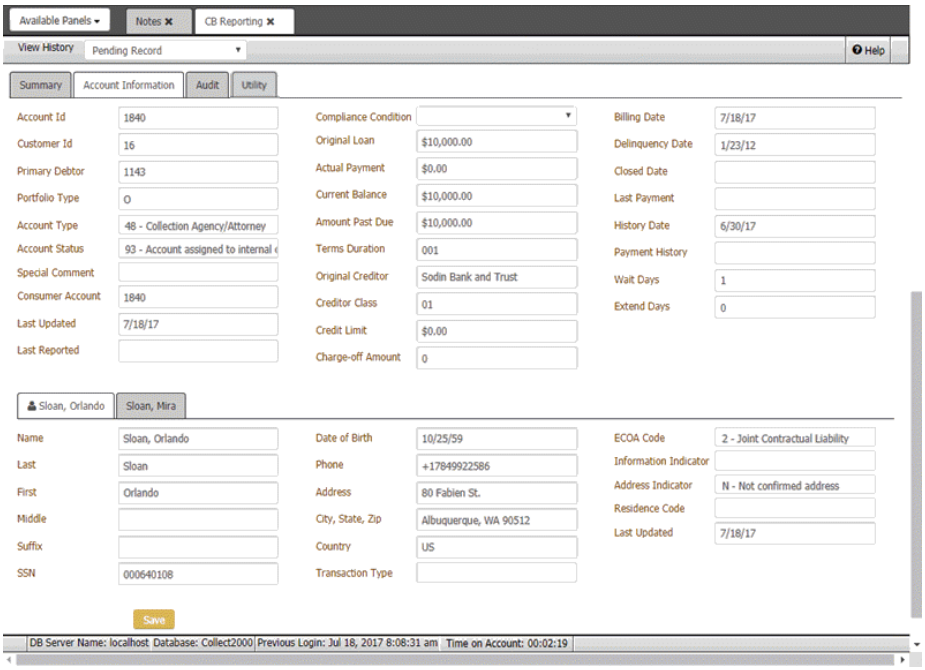
Feedback

Remove a Responsible Party From Credit Bureau Reporting

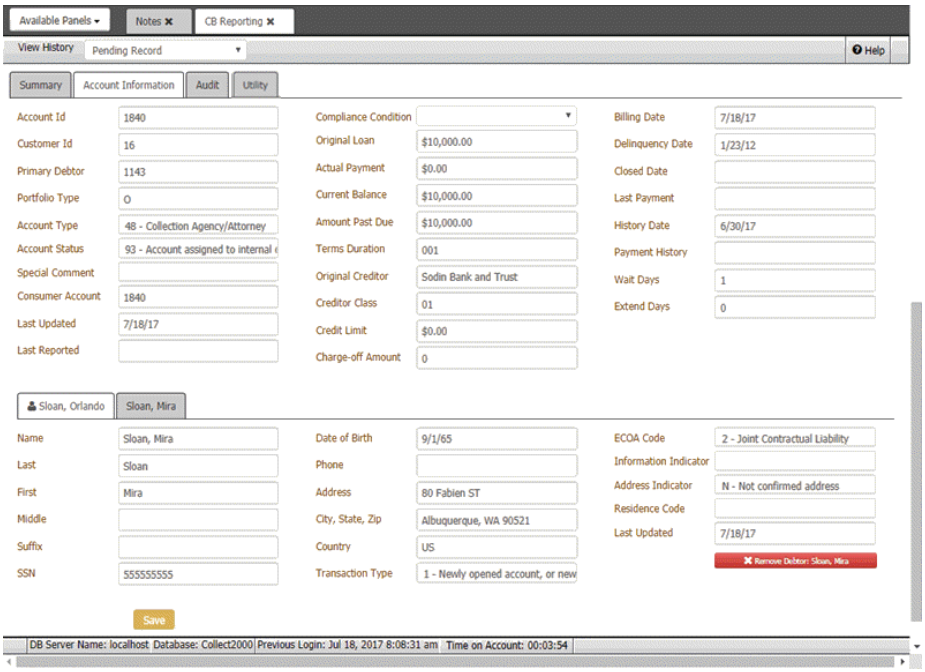
Use the **Account Information** tab on the **CB Reporting** panel to remove a responsible party associated to the account from credit bureau reporting.

To remove a responsible party from credit bureau reporting

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **CB Reporting**.
2. Click the **Account Information** tab.



3. Click the tab that corresponds to the party's name.



4. Click **Remove Debtor - [Debtor Name]**.
5. In the confirmation dialog box, click **OK**. The system adds an audit trail record to Latitude.
6. In the **Task Panel** navigation tree, click **Customer** and then click the party's name.
7. Clear the **Is Responsible** check box and then click **Save**.

Related Topics

Credit Bureau Reporting

Feedback

Send Delete Request for Account Reported in Error

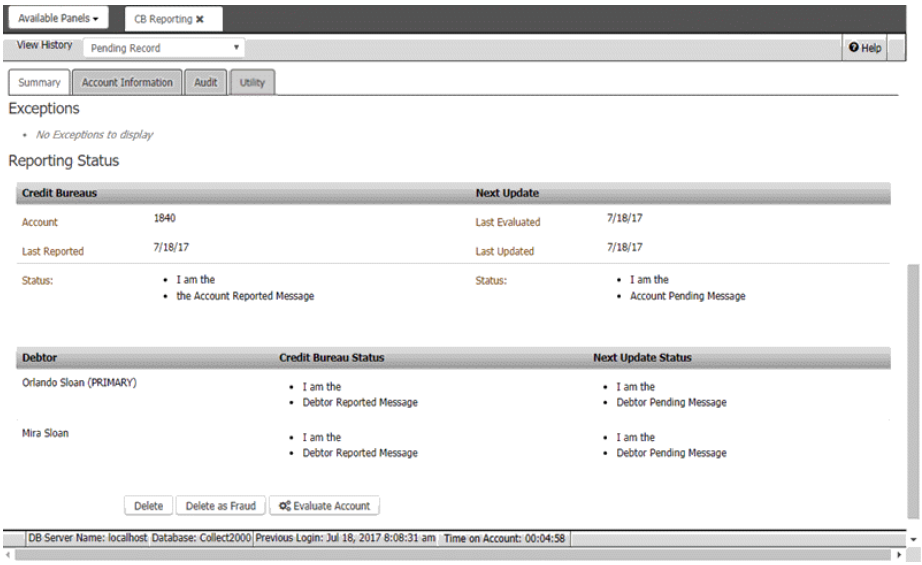
Use the **Summary** tab on the **CB Reporting** panel to send a delete request to the credit bureaus for the account. You can send the delete request if the account reported previously and one of the following is true:

- Account reported in error.
- Agency closed and returned the account to the creditor.
- Debt buyer forwarded or sold the account.
- Account reported as disputed and your agency couldn't verify the dispute before the FCRA 30-day window.
- Customer is deceased and no other party on the account is responsible for the account.
- Responsible party has a discharged bankruptcy Chapter 7 or is in a Chapter 13 repayment plan currently.

You must have the Allow Delete Options Permission.

To send delete request for account reported in error

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **CB Reporting**.
2. Click the **Summary** tab.



3. Click **Delete**.
4. In the confirmation dialog box, click **OK**. The system displays a message indicating that the account is deleted from reporting and adds an audit trail record. The system sends a delete request for the account in the next CBR file that your organization creates and excludes the account from subsequent credit reporting.

Note: If you remove the account from reporting and the account is not yet reported, you can undo the delete. For more information, see Undo a Credit Reporting Delete Request.

Related Topics

Credit Bureau Reporting

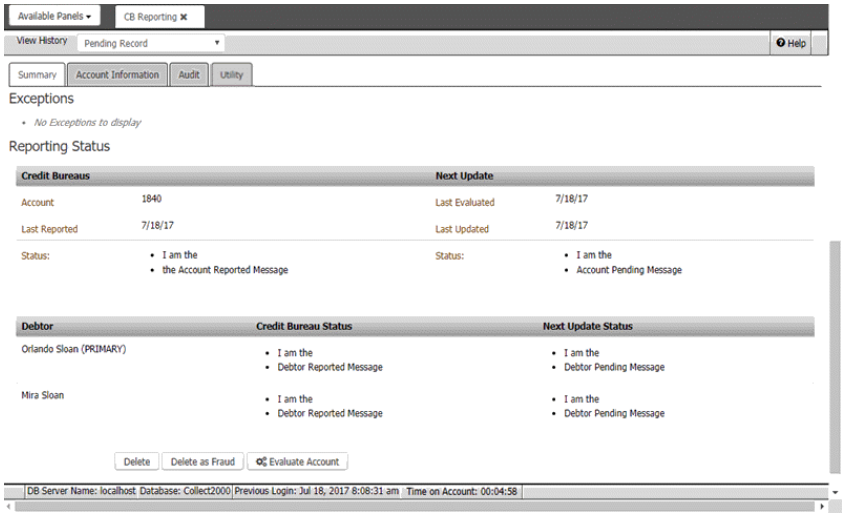
Feedback

Send Delete Request for Account Reported Based on Fraud

Use the **Summary** tab on the **CB Reporting** panel to send a delete request to the credit bureaus for the account. You can send the delete request when the customer is a victim of fraud and the account reported previously. You must have the Allow Delete Options Permission.

To send delete request for account reported based on fraud

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **CB Reporting**.
2. Click the **Summary** tab.



3. Click **Delete as Fraud**.
4. In the confirmation dialog box, click **OK**. The system displays a message indicating that the account is deleted from reporting and adds an audit trail record. The system sends a delete request for the account in the next CBR file that your organization creates and excludes the account from subsequent credit reporting.

Note: If you remove the account from reporting and the account is not yet reported, you can undo the delete. For more information, see Undo a Credit Reporting Delete Request.

Related Topics

Credit Bureau Reporting

Feedback

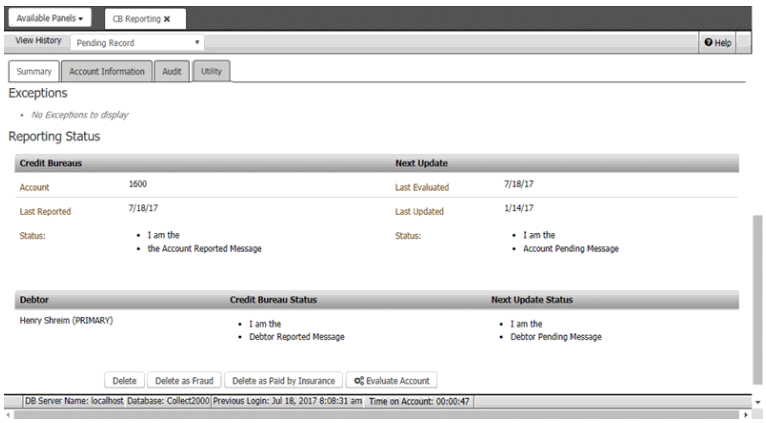
Send Delete Request for Medical Account

Use the **Summary** tab on the **CB Reporting** panel to send a delete request to the credit bureaus for the account. You can send the delete request when insurance is paying or paid the medical debt in full and the account reported previously. You must have the You must have the Allow Delete Options Permission..

To send delete request for medical account

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **CB Reporting**.

2. Click the **Summary** tab.



3. Click **Delete as Paid by Insurance**.

4. In the confirmation dialog box, click **OK**. The system displays a message indicating that the account is deleted from reporting and adds an audit trail record. The system sends a delete request for the account in the next CBR file that your organization creates and excludes the account from subsequent credit reporting.

Note: If you remove the account from reporting and the account is not yet reported, you can undo the delete. For more information, see Undo a Credit Reporting Delete Request.

Related Topics

Credit Bureau Reporting

Feedback

Undo a Credit Reporting Delete Request

Use the **Summary** tab to undo the credit reporting delete request for the account, if you haven't sent the delete request to the credit bureaus. You can undo the following:

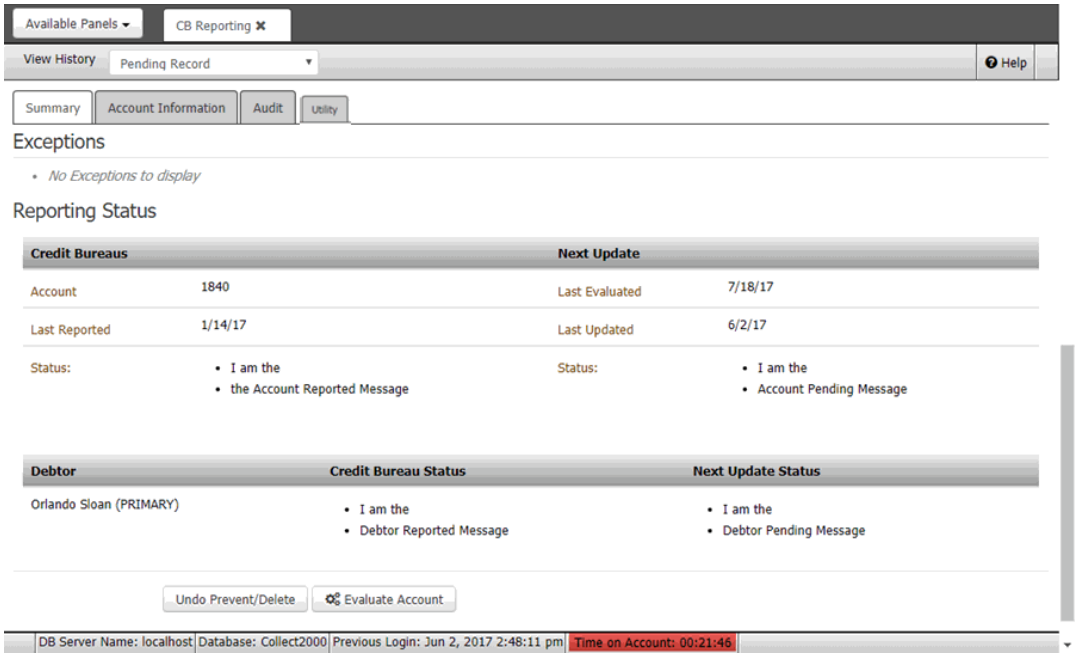
- Delete requests for accounts reported in error.

- Delete requests for customers who are a victim of fraud.
- Delete requests for accounts that insurance is paying or paid in full.

You must have the Allow Prevent Flag and Undo Delete Permission.

To undo a credit reporting delete request

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **CB Reporting**.
2. Click the **Summary** tab.



3. Click **Undo Prevent/Delete**.
4. In the confirmation dialog box, click **OK**. The system includes the account in subsequent credit reporting evaluations.

Related Topics

Credit Bureau Reporting

Credit Bureau Reporting Codes

Feedback

Credit Bureau Reporting Codes

Latitude supports several credit bureau reporting codes. For more information, see the following:

- Account Types
- Address Indicator
- CBR Account Status Codes
- Compliance Condition Codes
- Consumer Information Indicator (Bankruptcy) Codes

- Credit Bureau Reporting Exceptions
- Creditor Classification Code
- ECOA Codes
- Industry Codes
- Portfolio Types
- Residence Codes
- Special Comment Codes
- Supported Reporting Codes
- Transaction Types

Feedback

Account Types

The following table lists the account types that Latitude supports.

Code	Description
04	Home Improvement
05	Federal Housing Administration (FHA) Home Improvement Loan
0A	Time Share Loan
0C	Debt Purchaser
0F	Construction Loan
0G	Flexible Spending Credit Card
17	Manufactured Housing
18	Credit Card
2A	Secured Credit Card
37	Combined Credit Plan
48	Collection Agency/Attorney
6D	Home Equity
77	Returned Check
89	Home Equity Line of Credit
8A	Business Credit Card
9A	Secured Home Improvement

Related Topics
Credit Bureau Reporting Codes

Credit Bureau Reporting

Feedback

Address Indicator

The following table lists the address codes that Latitude supports.

Code	Description
[blank]	Address not available or unknown.
B	Business address - not consumer's residence.
C	Confirmed/Verified address **Note:** Use this code to report a confirmed or verified address after receiving an address discrepancy notification from a consumer reporting agency. Report this code one time after confirming the address.
D	Data reporter's default address.
M	Military address.
N	Not confirmed address.
P	Bill Payer Service - not consumer's residence.
S	Secondary address.
U	Non-deliverable address/Returned mail.
Y	Known to be address of consumer.

Related Topics

Credit Bureau Reporting Codes

Credit Bureau Reporting

Feedback

CBR Account Status Codes

The following table lists the CBR account status codes that Latitude supports.

Status Code	Description
05	Account transferred.
11	Current account (0-29 days past the due date). Installment and Mortgage loans require a current account with a non-zero balance amount. Credit Line, Open, and Revolving portfolio types require a current account that is available for use. For a closed account with a balance due, report Special Comment Code "M" or Compliance Condition Code "XA" to indicate that the account is no longer available for use.
13	Paid or closed account; zero balance. Installment and Mortgage loans require a paid account with a zero balance amount. Credit Line, Open, and Revolving portfolio types require an account that is no longer available for use and has a zero balance amount. Report Special Comment Code "M" or Compliance Condition Code "XA" to indicate a closed account.
62	Account paid in full; account was a collection account.
64	Account paid in full; account was a charge-off.

65	Account paid in full; foreclosure started.
71	Account 30-59 days past the due date.
78	Account 60-89 days past the due date.
80	Account 90-119 days past the due date.
82	Account 120-149 days past the due date.
83	Account 150-179 days past the due date.
84	Account 180 days or more past the due date.
89	Deed received in lieu of foreclosure on a defaulted mortgage.
93	Account assigned to internal or external collections.
94	Foreclosure completed; collateral sold to settle defaulted mortgage.
97	Unpaid balance reported as a loss (charge-off).
DA	Delete entire account (for reasons other than fraud). For example: • Account reported in error. • Consumer is deceased and no other associated party remains responsible for the account. • Insurance is paying the account, or paid the account in full. • Debt buyer forwarded or sold the account. • Third-party agency canceled and returned the account to the creditor. • Consumer has a discharged bankruptcy Chapter 7 or is in a Chapter 13 repayment plan currently. **Note:** To maintain the integrity of credit information, don't request a subsequent deletion of account history unless reporting an actual error. Report paid derogatory accounts, such as collections, as paid; don't delete them.
DF	Delete entire account because of confirmed fraud (fraud investigation completed).

Related Topics

Credit Bureau Reporting Codes

Credit Bureau Reporting

Feedback

Compliance Condition Codes

The following table lists the compliance condition codes that Latitude supports.

Code	Description
[blank]	Retains value reported previously or, no new Compliance Condition Code applies for this activity period.
XA	Account closed at consumer's request.

XB	Consumer disputed account information under the Fair Credit Reporting Act (FCRA). This code reports for as long as it is valid.
XC	Completed investigation of FCRA dispute; consumer disagrees.
XD	Account closed at consumer's request and in dispute under FCRA.
XE	Account closed at consumer's request and dispute investigation completed; consumer disagrees. Used for FCRA or FCBA disputes.
XF	Account in dispute under Fair Credit Billing Act (FCBA).
XG	FCBA dispute resolved; consumer disagrees.
XH	Account in dispute previously, now resolved and data furnisher reported. Used for FCRA or FCBA disputes.
XJ	Account closed at consumer's request and in dispute under FCBA.
XR	Removes the most recently reported compliance condition code. **Note:** Do not use "XR" as a default value. If no Compliance Condition Code applies in the current activity period, insert a [blank] code.

Related Topics

Credit Bureau Reporting Codes

Credit Bureau Reporting

Feedback

Consumer Information Indicator (Bankruptcy) Codes

The following table lists the Consumer Information Indicator (bankruptcy) codes that Latitude supports. Your organization can add other codes as needed. The system determines the code using the legal bankruptcy milestone dates specified for the account. The system uses a default code for accounts with a bankruptcy chapter but no legal milestone dates.

Code	Description
[blank]	Retains value reported previously, or no new Consumer Information Indicator applies for this activity period.
A	Petition for Chapter 7 bankruptcy.
B	Petition for Chapter 11 bankruptcy.
C	Petition for Chapter 12 bankruptcy.
D	Petition for Chapter 13 bankruptcy.
E	Discharged through Chapter 7 bankruptcy.
F	Discharged through Chapter 11 bankruptcy.
G	Discharged through Chapter 12 bankruptcy.
H	Discharged and completed through Chapter 13 bankruptcy. Report when consumer completes all payments through the Chapter 13 plan.
I	Chapter 7 bankruptcy dismissed.
J	Chapter 11 bankruptcy dismissed.
K	Chapter 12 bankruptcy dismissed.

L	Chapter 13 bankruptcy dismissed.
Q	Removes Bankruptcy Indicator (A through P, and Z) reported previously or Personal Receivership Indicator (1A). Also used to report bankruptcies that closed or terminated without being discharged or dismissed. **Note:** Don't report "Q" as a default value. Fill with a blank instead.
R	Reaffirmation of debt.
Z	Bankruptcy - Undesignated chapter.

Related Topics

Credit Bureau Reporting Codes

Credit Bureau Reporting

Feedback

Credit Bureau Reporting Exceptions

Exceptions prevent an account from reporting to the credit bureaus. More than one exception can exist simultaneously for the primary customer, responsible parties, and authorized parties. Account level errors that include the primary customer prevent the respective account from reporting. Errors at the responsible or authorized party level don't prevent the account from reporting but the system excludes them from reporting for the respective account. Accounts with exceptions don't report again until you correct the exceptions.

The following table lists the exceptions that prevent an account from reporting to the credit bureaus.

Exception	Description	Level	First-party	Third-party
Business	Account is for a business, not an individual.	Account	Yes	Yes
DebtorExcluded	User flagged the account for exclusion from reporting.	Customer	Yes	Yes
DebtorNotResponsible	User flagged a party on the account as not responsible for the debt. Party on the account is not a first-party authorized user.	Customer	Yes	Yes
DelinquencyDt>Received	Delinquency date is after the account received date.	Account	Yes	Yes
DelinquencyDtWithin30DaysOfReceived	Delinquency date is less than 30 days before the account received date.	Account	Yes	Yes
InvalidAcctType	Account type doesn't match the portfolio type and industry code. This issue is rare and indicates a configuration or data problem.	Account	Yes	Yes
InvalidConsumerAccountNumber	Consumer account number is missing.	Account	Yes	No
InvalidContractDate	Contract date is missing.	Account	Yes	No
InvalidContractToPay	Contract date is missing and the creditor class is not medical.	Account	Yes	Yes
InvalidDebtorZipcode	Customer's ZIP Code is invalid. *	Customer	Yes	Yes

InvalidDOB	Authorized user's date of birth is missing or a responsible party's SSN and date of birth are both missing. If the account reported previously, the date of birth constraint doesn't apply for authorized users. *	Customer	Yes	Yes
InvalidFirstName	Customer's last name is missing or invalid. *	Customer	Yes	Yes
InvalidLastName	Customer's last name is missing or invalid. *	Customer	Yes	Yes
InvalidOriginalLoanAmount	Original loan amount is missing.	Account	Yes	Yes
InvalidState	Customer's state (in address) is invalid. *	Customer	Yes	Yes
MedicalWithin180Days	Account has a medical creditor classification and is less than 180 days past the delinquency date.	Account	Yes	Yes
MinBalException	Current account balance is less than the configured minimum amount.	Account	Yes	Yes
MissingAcctOriginalCreditor	Original creditor is missing and there isn't a default original creditor provided.	Account	Yes	Yes
MissingChargeOffAmount	Charge-off amount is missing.	Account	Yes	No
MissingChargeOffRecord	Required charge-off information is missing.	Account	Yes	No
MIssingCity	Customer's city (in address) is missing. *	Customer	Yes	Yes
MissingCreditorClass	Creditor classification is missing.	Account	Yes	Yes
MissingDefaultOriginalCreditor	Default original creditor is missing.	Account	Yes	Yes
MissingSecondaryAccountNumber	Secondary account number is missing and the debt is charge-off mortgage.	Account	Yes	No
MissingSecondaryAgencyIdentifier	Secondary agency identifier is missing and the debt is charge-off mortgage.	Account	Yes	No
MissingSSN&DOB	Customer's SSN or date of birth is missing. *	Customer	Yes	Yes
MissingStreetAddress	Customer's street address line 1 is missing. *	Customer	Yes	Yes
NullDebtorZipcode	Customer's ZIP Code is missing. *	Customer	Yes	Yes
NullDelinquencyDt	Delinquency date is missing.	Account	Yes	Yes
OpenChargeOffNotInBankruptcy	Charge-off account has an open status and isn't in bankruptcy.	Account	Yes	No
OutofStatute	Federal 7-year reporting statute expired.	Account	Yes	Yes
ReportDateNotMet	Account has a reporting wait time set that is not expired.	Account	Yes	Yes
ZeroedDebtorZipcode	Customer's ZIP Code contains all zeroes. *	Customer	Yes	Yes

* Applies to reported accounts with an open date after September 15, 2017.

Related Topics

Credit Bureau Reporting Codes

Credit Bureau Reporting

Feedback

Creditor Classification Code

The following table lists the creditor classification codes that Latitude by Genesys supports.

Code	Description
01	Retail
02	Medical/Health Care
03	Oil Company
04	Government
05	Personal Services
06	Insurance
07	Educational
08	Banking
09	Rental/Leasing
10	Utilities
11	Cable/Cellular
12	Financial
13	Credit Union
14	Automotive
15	Check Guarantee

Related Topics

Credit Bureau Reporting Codes

Credit Bureau Reporting

Feedback

ECOA Codes

The following table lists the Equal Credit Opportunity Act (ECOA) codes that Latitude by Genesys supports.

Code	Description
1	**Individual:** Party has contractual responsibility for the account and has primary responsibility for its payment.
2	**Joint Contractual Liability:** Party signed an agreement to repay all debts arising on the account. There are other parties associated to the account who could have contractual responsibility.
3	**Authorized User:** Party is an authorized user of the account; another party has contractual responsibility.
5	**Co-maker or Guarantor:** Party guaranteed the account and assumes responsibility for the account if the maker defaults.

7	**Maker:** Party is responsible for the account; a cosigner guaranteed the account.
T	**Terminated:** Party is no longer associated to the account; do not report.
W	**Business/Commercial:** Account is for a company.
X	**Deceased:** Party is deceased. There could be other parties associated to the account.
Z	**Delete:** Party reported in error; delete the party from the reporting file.

Related Topics

Credit Bureau Reporting Codes

Credit Bureau Reporting

Feedback

Industry Codes

The following table lists the industry codes that Latitude by Genesys supports.

Code	Description
CC	Credit Card
DEBTCOLL	Debt Collection
MORTGAGE	Mortgage

Related Topics

Credit Bureau Reporting Codes

Credit Bureau Reporting

Feedback

Portfolio Types

The following table lists the portfolio types that Latitude by Genesys supports.

Code	Description
C	Line of credit
I	Installment
O	Open Account
R	Revolving

Related Topics

Credit Bureau Reporting Codes

Credit Bureau Reporting

Feedback

Residence Codes

The following table lists the residence codes that Latitude by Genesys supports.

Code	Description
[blank]	Not available or unknown.
O	Consumer owns the residence associated to the reported address.
R	Consumer rents the residence associated to the reported address.

Related Topics

Credit Bureau Reporting Codes

Credit Bureau Reporting

Feedback

Special Comment Codes

The following table lists the special comment codes that Latitude by Genesys supports.

Code	Description
AB	Debt paid through insurance. Account status code cannot be "13", "61", "62", "63", "64", or "65".
AC	Paying under a partial payment agreement. Account status code cannot be "13", "61", "62", "63", "64", or "65".
AG	Simple interest loan. Any loan where interest compounds daily.
AH	Purchased by another company.
AI	Recalled to active military duty.
AJ	Payroll deduction.
AM	Account payments assured through wage garnishment.
AN	Account acquired by Federal Deposit Insurance Corporation (FDIC) or National Credit Union Administration (NCUA).
AP	Credit Line suspended. The credit line is temporarily unavailable for use.
AS	Account closed because of refinance.
AT	Account closed because of transfer. Used for internal transfers.
AU	Account paid in full for less than the full balance. Requires account status code "13", "61", "62", "63", "64", or "65" and a current balance of 0.
AV	First payment never received; could indicate fraudulent activity.
AW	Affected by natural or declared disaster.
AX	Account paid from collateral. Requires account status code "13", "61", "62", "63", "64", or "65" and a current balance of 0.
B	Financial counseling program manages the account payments.
BA	Transferred to Recovery. Requires account status code "71", "78", "80", "82", "83", "84", "88", "89", "93", "94", "95", "96", or "97".

BL	Credit card lost or stolen.
BN	Company that originally sold the merchandise paid. Requires account status code "13", "61", "62", "63", "64", or "65" and a current balance of 0.
BP	Paid through insurance. Requires account status code "13", "61", "62", "63", "64", or "65" and a current balance of 0.
BT	Principal deferred; interest payment only.
C	Co-maker or Guarantor pays. Requires account status code "13", "61", "62", "63", "64", or "65" and a current balance of 0.
CH	Guaranteed, insured.
CJ	Credit line no longer available; in repayment phase. Account status code cannot be "13", "61", "62", "63", "64", or "65" and the current balance cannot be 0. Use for line of credit accounts that have two phases: the borrowing phase and the repayment phase. The repayment phase is a natural progression for the account when the consumer is responsible for payment of the outstanding balance and the credit line is no longer available for use.
CK	Credit line reduced because of collateral depreciation. Use for home equity or other secured line of credit accounts.
CM	Creditor released the collateral; balance owing. Account status code cannot be "13", "61", "62", "63", "64", or "65" and the current balance cannot be 0. Use for mortgages, home equity, or other secured accounts when the creditor releases the collateral but the consumer still has an outstanding balance to repay.
CN	Loan modified under a federal government plan.
CO	Loan modified, but not under a federal government plan.
H	Another party assumed the loan. Requires ECOA Code "T" (Terminated).
M	Account closed at credit grantor's request.
O	Account transferred to another lender.
S	Special handling. Contact credit grantor for more information.
V	Adjustment pending. Account adjustment, such as returned merchandise or refund due.

Related Topics

Credit Bureau Reporting Codes

Credit Bureau Reporting

Feedback

Supported Reporting Codes

The following table lists the reporting codes that Latitude by Genesys supports by industry and portfolio type.

Industry Code	Portfolio Types	Account Types	CBR Account Status Codes	Compliance Condition Codes	Special Comment Codes	ECOA Codes
CC	O	18 2A	05 11	[blank] XA	AB AC	1 2

		37 8A	13 64 71 78 80 82 83 84 97 DA DF	XB XC XD XE XF XG XH XJ XR	AH AI AJ AM AN AP AT AU AV AW B BA BL BP C CH CN CO M O S V	3 5 7 T W X Z
CC	R	OG 18 2A 37 8A	05 11 13 64 71 78 80 82 83 84 97	[blank] XA XB XC XD XE XF XG XH XJ XR	AB AC AH AI AJ AM AN AP AT AU AV	1 2 3 5 7 T W X Z

			DA DF		AW AX B BA BL BP C CH CM CN CO M O S V	
DEBTCOLL	O	OC 48 77	62 93 DA DF	XB XC XF XG XH XR	AB AC AI AJ AM AU AW B BP C S V	1 2 3 5 7 T W X Z
MORTGAGE	C	89	05 11 13 64 65 71	XA XB XC XD XE XF	AB AC AH AI AJ AM	1 2 3 5 7 T

			78	XG	AN	W
			80	XH	AP	X
			82	XJ	AS	Z
			83	XR	AT	
			84		AU	
			89		AV	
			94		AW	
			97		B	
			DA		BA	
			DF		BP	
					C	
					CH	
					CJ	
					CK	
					CM	
					CN	
					CO	
					M	
					O	
					S	
					V	
MORTGAGE	I	04	05	XB	AB	1
		05	11	XC	AC	2
		0A	13	XF	AG	3
		0F	64	XG	AH	5
		17	65	XH	AI	7
		6D	71	XR	AJ	T
		9A	78		AM	W
			80		AN	X
			82		AS	Z
			83		AT	
			84		AU	
			89		AV	

			94 97 DA DF		AW AX B BA BN BP BT C CH CM CN CO H O S V	

Related Topics

Credit Bureau Reporting Codes

Credit Bureau Reporting

Feedback

Transaction Types

The following table lists the transaction types that Latitude by Genesys supports.

Code	Description
[blank]	Account or borrower is not new, or no change in consumer information.
1	Newly opened account, or new borrower associated to existing account.
2	Name change.
3	Address change.
5	Social Security Number change.
6	Name and address change.
8	Name and Social Security Number change.
9	Address and Social Security Number change.
A	Name, Address, and/or Social Security Number change.

Related Topics

Credit Bureau Reporting Codes

Credit Bureau Reporting

Credit Report

Credit Report

Use the Credit Report panel to view and request a consumer credit report from Equifax, TransUnion , Experian using SmartALX or TUNA. The ability to view the Credit Report panel is based on your permissions.

Related Topics

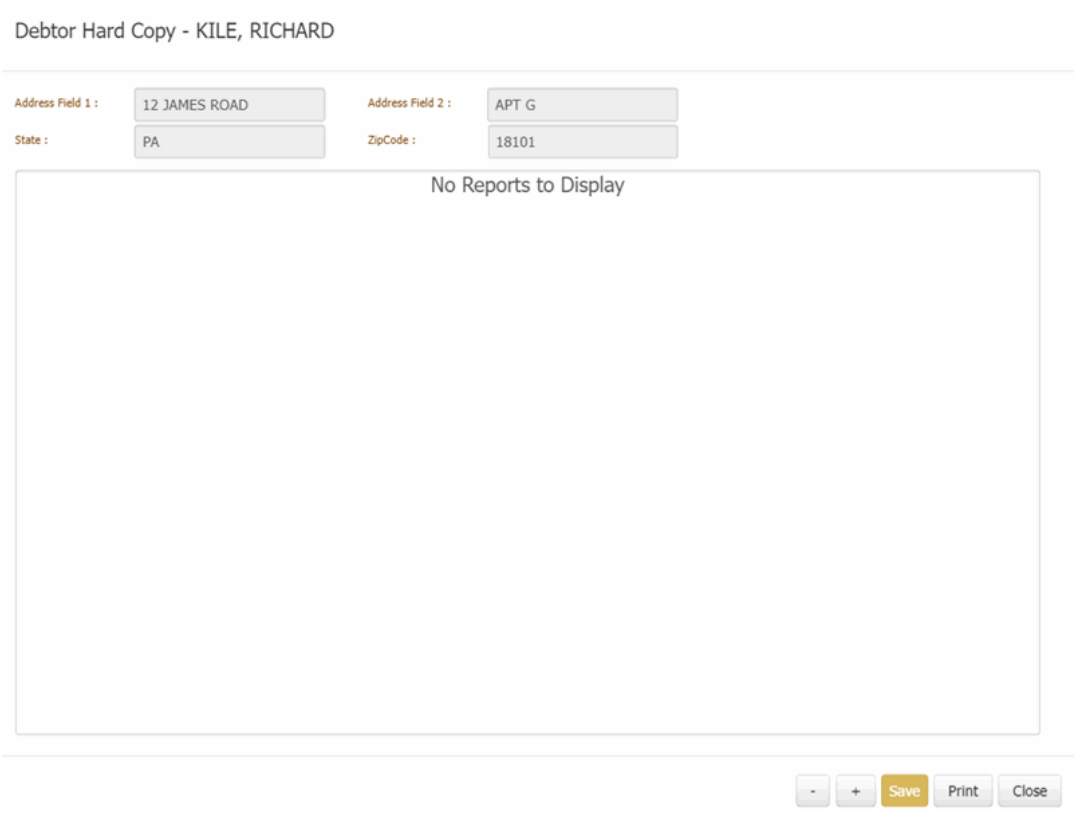
View Credit Report

View Credit Report

Use the Credit Report panel to view credit details associated to the account. You must have Reference Panels Permission enabled with Credit Report selected in Available Panels section, to view Credit Report panel.

To view credit report panel

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Credit Report**.
2. Select any credit report from the grid and then click **View Report**.



Request New Credit Report: To request a new report

View Report Cancel Report: To view the cancelled report

Show Failed check box: If the check box is selected, all the reports are displayed including failed reports. If the check box is cleared then only the requested reports are displayed.

ReportID: Is the credit report ID

Date: Is the credit report date.

Vendor: Credit Report Vendor

Status: Status of the credit Report.

Debtor Name: Credit report debtor name

User: Credit report user name

Save button: To save the changes made.

Print button: To print the credit report

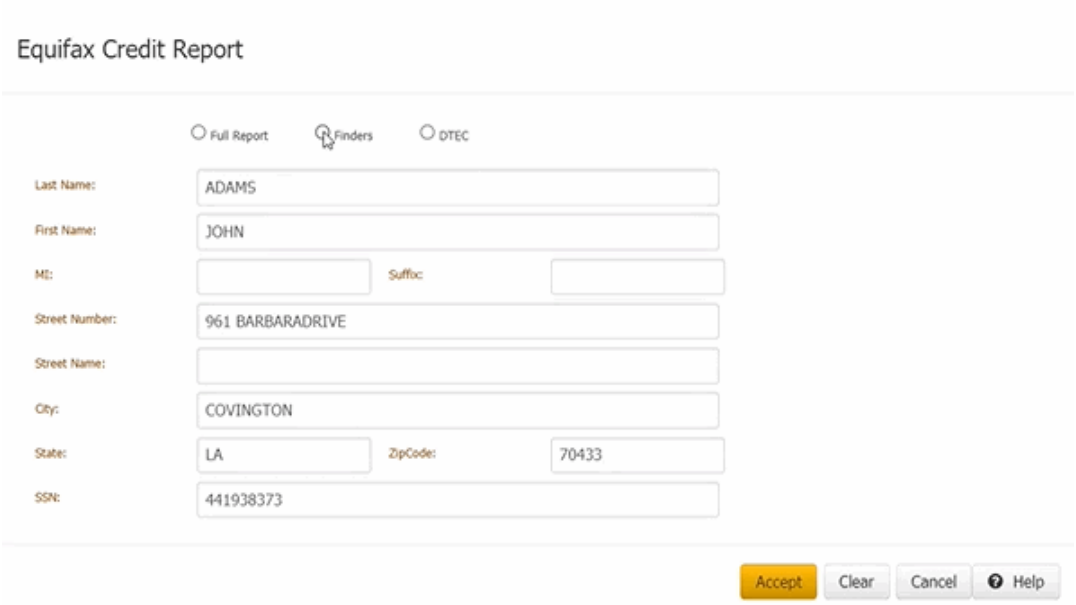
Cancel button: To exist by making no changes to the credit report.

Request a Credit Report

Use the Credit Report panel to view credit details associated to the account. You must have Reference Panels Permission enabled with Credit Report selected in Available Panels section, to view Credit Report panel. You must also have the Services Settings permissions,

To request a credit report

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Credit Report**.
2. Click in the **Request New Credit Report** box and select any option from the list.



Full Report: Vender's full report

Finders: Vendors Finders

DTEC: Vendors DTEC

Last Name: Party's last name

First Name: Party's first name

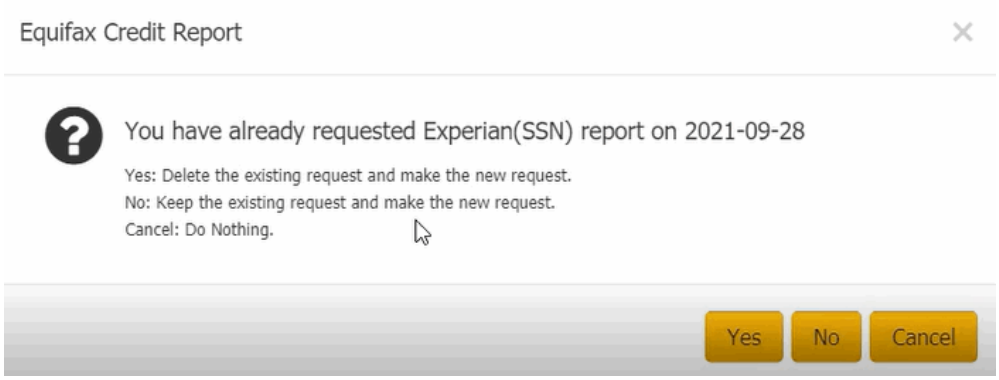
MI: Party's middle name

Suffix: Party's name suffix

Street Number, Street Name, City, State, Zipcode: Party's street address, street name, city, state, and postal code.

SSN: Party's Social security number

Accept button: After making any updates to the existing if you click **Accept** button a confirmation dialog box appears.



- To delete the existing request and add a new report, click **Yes**.
- To keep the existing request and add a new report, click **No**.
- To keep as it is without any change, click **Cancel**.

Clear button: To clear all the details displayed.

Cancel button: To any changes made.

Delete Credit Report

To delete a credit report

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Credit Report**.
2. Select any credit report from the grid and then click **Cancel Report**
3. Click **Ok** in the confirmation dialog box to delete the data.

Custom Panel

Custom Panel

Use custom panels to view information that your organization specifies. For each panel, your organization specifies a panel name, the data to display, and whether users can view the panel.

Related Topics

Create a Custom Panel

View a Custom Panel

Reference Panels Permission

Reference Panels

Data Grids

Feedback

Create a Custom Panel

Administrators can create a custom panel to display read-only data for the account. An administrator specifies a name for the panel, the data to display, and whether users can view the panel. Administrators can create as many custom panels as necessary.

To create a custom panel

1. Create a stored procedure that takes in the @accountid parameter as an INT and specifies the data to display in the panel. The @accountid parameter is the file number. The following example shows a procedure that pulls data from the lat.Note table:

```
CREATE PROCEDURE dbo.TestNotes

(

   @accountid INT

)

AS

BEGIN


SELECT [UserName], [ActionCode], [ResultCode], [Comment], [DateCreated]

FROM [lat].[Note]

WHERE [AccountId] = @accountid

ORDER BY [DateCreated] DESC


END


GO
```

2. Insert a row into the lat.UserInterfacePlugins table that specifies the plug-in name, display name (panel name), and Sproc name. Don't change the "type" or "URL" values. See the following example:

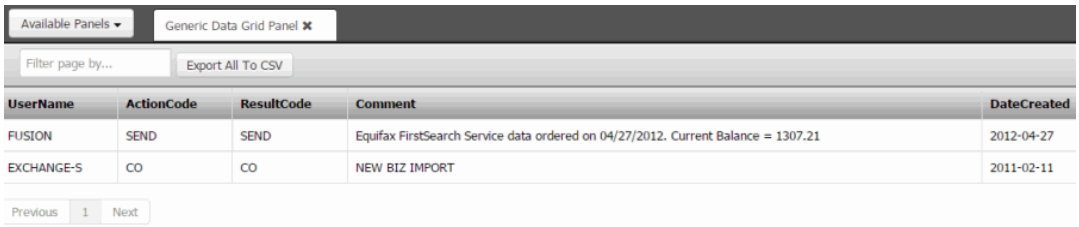
```
INSERT INTO [lat].[UserInterfacePlugins]

      ( [Type] ,

        [PluginName] ,
```

```
        [DisplayName] ,
        [Url] ,
        [Parameters]
      )
VALUES ( 'PANEL' , -- Type - varchar(25)
        'GenericDataPanel' , -- PluginName - varchar(50)
        N'Generic Data Grid Panel' , -- DisplayName - nvarchar(100)
        N'workform/views/panel/genericPanel.tmpl.html' , -- Url - nvarchar(250)
        'dbo.TestNotes' -- Parameters - varchar(255)
      )
```

3. Enable the panel in the Reference Panels permission. When a user with the appropriate permissions opens the panel, Latitude calls the associated procedure, passes the file number, and displays the returned data in the associated panel.



Related Topics

Data Grids

Custom Panel

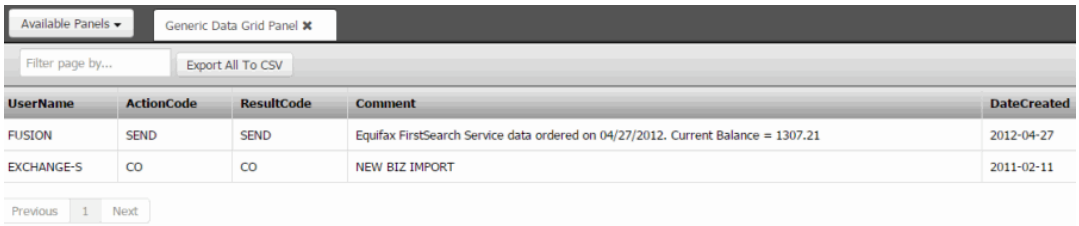
Feedback

View a Custom Panel

Use a custom panel to view information that your organization configured to display for the account. You can filter the data and also export the data to a Comma Separated Value (CSV) file. You must have the Reference Panels Permission to view the custom panel.

To view a custom panel

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click the name of the custom panel. The following is an example of a custom panel.



2. To display only the rows with data that meet specific criteria, in the **Filter page by** box, type a word or phrase. Only rows with data that match the specified criteria display in the data grid.

3. To export all the unfiltered data to a CSV file, click **Export All To CSV**. The system downloads all data to a CSV file. If you have Microsoft Excel, the system defaults to opening the file in Microsoft Excel.

Tip: To clear a filter, delete the content in the **Filter page by** box.

Related Topics

Data Grids

Custom Panel

Documentation

Feedback

Documentation

Use the **Documentation** panel to attach electronic documents to the account. You can also view, download, and detach documents. You must have the appropriate permissions to attach, view, and detach documents.

Related Topics

Attach a Document to an Account

View Documents Attached to an Account

Download a Document

Delete a Document From an Account

Reference Panels Permission

Reference Panels

Data Grids

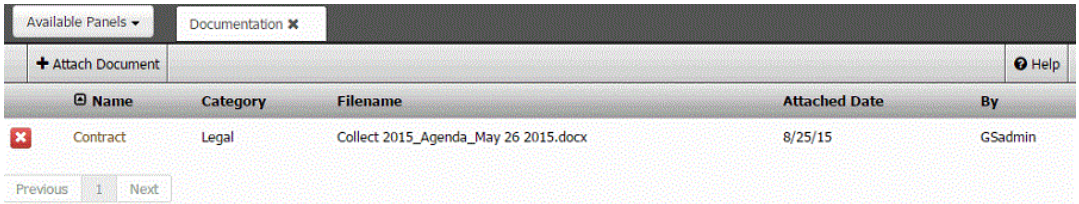
Feedback

Attach a Document to an Account

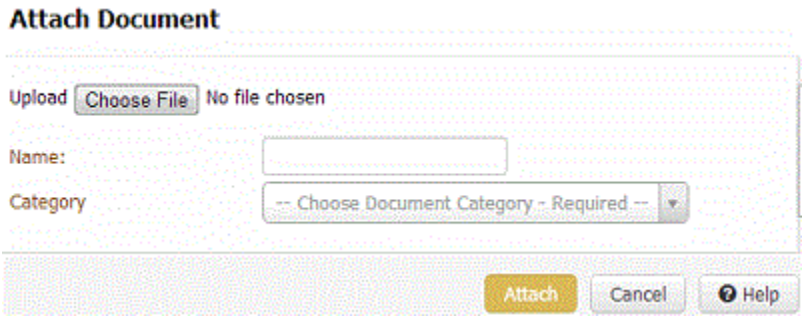
Use the **Documentation** panel to attach an electronic document to the account. Latitude supports any document type, such as a Word document, Excel file, text file, or image. You must have the Attach Documentation Permission.

To attach a document to an account

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Documentation**.



2. In the **Documentation** toolbar, click **Attach Document**.



3. Do one of the following, depending on what your Internet browser allows:
   - Click **Choose File**. In the **Open** dialog box, locate the file to attach, click it, and then click **Open**.
   - Drag and drop a file onto **Choose File**.
4. In the **Name** box, type a name for the document.
5. In the **Category** list box, click the category to assign to the document.
6. Click **Attach**.

Related Topics

Data Grids

Documentation

Attach Documentation Permission

Documentation Categories

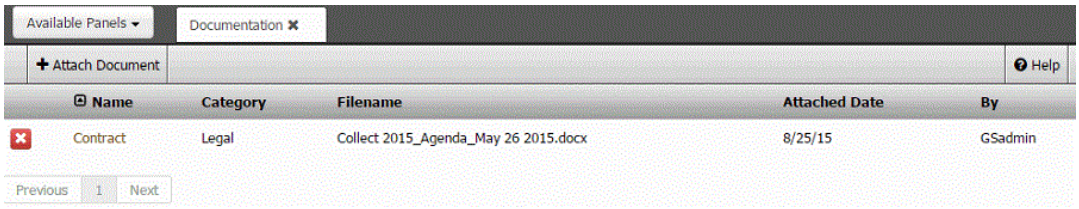
Feedback

View Documents Attached to an Account

Use the **Documentation** panel to view a list of documents that are attached to the account. You can also select a document and view it. You must have the View Attached Documents Permission.

To view documents attached to an account

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Documentation**.



2. To view a document, in the Name column, click the link. The document appears minimized beneath the status bar. Click the document to open it in the associated program (for example, Word, Excel).

Related Topics

Data Grids

Documentation

View Attached Documents Permission

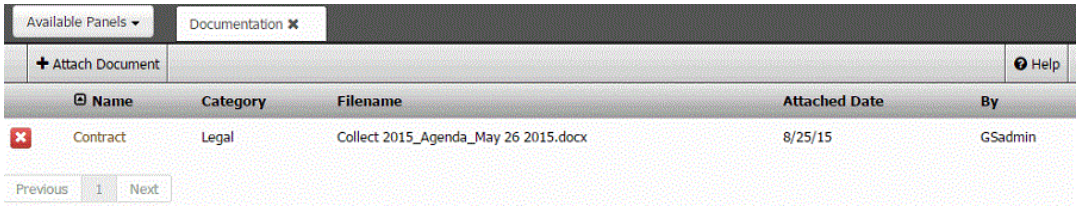
Feedback

Download a Document

Use the **Documentation** panel to download a document that is attached to the account.

To download a document

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Documentation**.



2. Do one of the following, depending on what your Internet browser allows:

   - In the **Name** column, right-click the link and then click **Save Target as...** Specify a location and file name and then click **Save**.
   - In the **Name** column, click the link. The document appears under the status bar. Click the document to open it in its associated program and then save the file.

Related Topics

Data Grids

Documentation

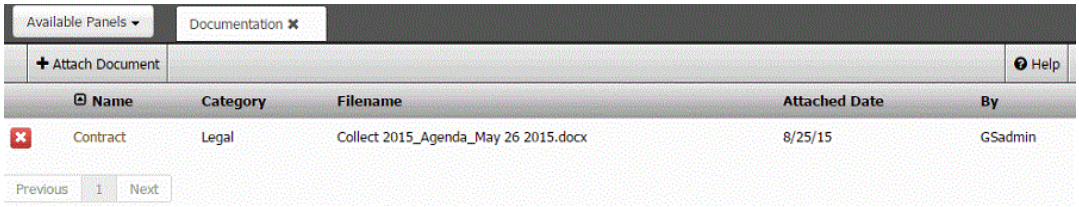
Feedback

Delete a Document From an Account

Use the **Documentation** panel to delete a document from the account. You must have the Delete Documentation Permission.

To delete a document from an account

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Documentation**.



2. Click the Delete icon and then click **OK**.

3. In the confirmation dialog box, click **OK**.

Related Topics

Data Grids

Documentation

Delete Documentation Permission

Early Stage

Early Stage

Use the Early Stage panel to view delinquency information for use in a first-party pre-charge off account. It is a ready-only panel. The ability to view the Early Stage panel is based on your permissions.

Related Topics

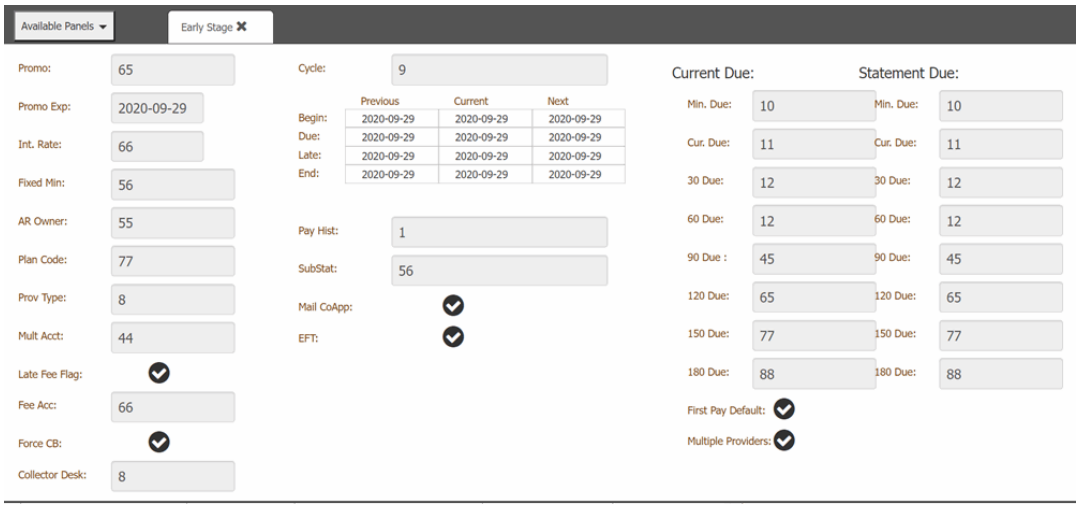
View Early Stage

View Early Stage

Use the **Early Stage** panel to view early stage details associated to the account. You must have Reference Panels Permission enabled with Early Stage selected in Available Panels section, to view Early Stage panel.

To view early stage panel

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Early Stage**.



Late Fee Flag: If data is available check mark is displayed. If there is false data then X mark is displayed. If there is no data then ? mark is displayed.

Force CB: If data is available check mark is displayed. If there is false data then X mark is displayed. If there is no data then ? mark is displayed.

Mail CoApp: If data is available check mark is displayed. If there is false data then X mark is displayed. If there is no data then ? mark is displayed.

EFT: If data is available check mark is displayed. If there is false data then X mark is displayed. If there is no data then ? mark is displayed.

First Pay Default: If data is available check mark is displayed. If there is false data then X mark is displayed. If there is no data then ? mark is displayed.

Multiple Providers: If data is available check mark is displayed. If there is false data then X mark is displayed. If there is no data then ? mark is displayed.

Email Addresses

Feedback

Email Addresses

Use the **Email** panel to view, add, and modify email addresses associated to the account. You can also indicate whether the contact person granted permission to send email messages to specific email addresses.

Related Topics

View Email Addresses

Add an Email Address

Modify an Email Address

Change the Status of an Email Address

Email Consent Icons

Email Status Icons

Reference Panels Permission

Reference Panels

Data Grids

Feedback

View Email Addresses

Use the **Email** panel to view email addresses associated to the account.

To view email addresses

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Email**.

Email Address: Person's email address.

Primary: If selected, the email address is the person's primary (main) email address.

Type: Type of email, such as home or work.

Consent: Indicates whether the person granted permission to send email messages to the email address.

Status: Status of the email address, such as good, bad, or unknown.

Contact: Name of the person associated to the email address.

2. To display email addresses for a specific person only, in the **Contact** box in the **Email** toolbar, click the name of the person. Only the email addresses for the specified person appear in the panel.

Tip: To clear the filter and display all email addresses, click **Clear Filters**.

Related Topics

Data Grids

Email Addresses

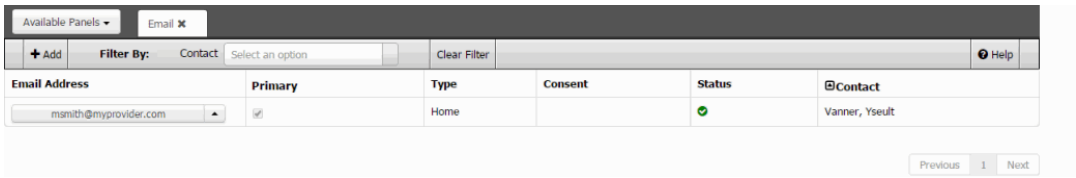
Feedback

Add an Email Address

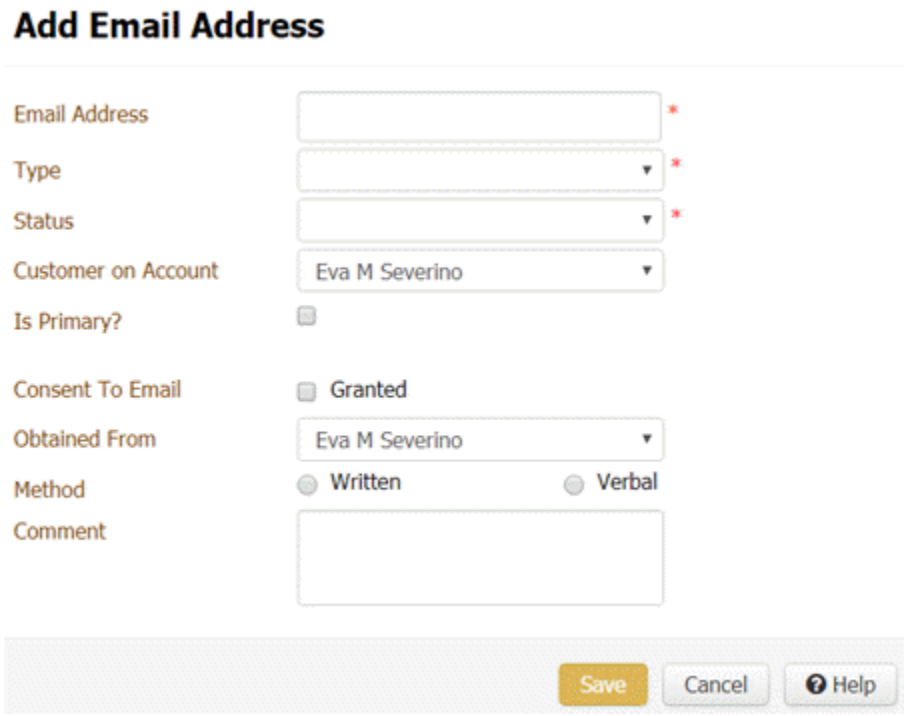
Use the **Add Email Address** dialog box to add an email address to the account.

To add an email address

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Email**.



2. In the **Email** toolbar, click **Add**.



Email Address: Person's email address (for example, jdoe@myprovider.com).

Type: Type of email address, such as home or work.

Status: Status of the email address, such as good, bad, or unknown.

Customer on Account: Person associated to the email address.

Is Primary: If selected, the email address is the person's primary (default) email address.

Consent To Email: If selected, the person granted permission to send email messages to this email address. If cleared, the person denied permission to send email messages to this email address.

Obtained From: Name of the person who granted or denied permission to send email messages to this email address.

Method: Indicates whether the person granted permission verbally or in writing.

Comment: More information regarding the email address.

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

Related Topics

Data Grids

Email Addresses

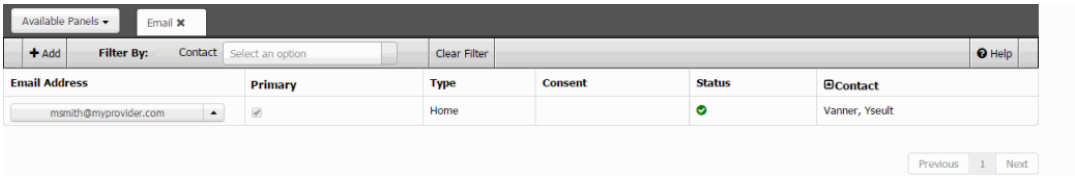
Feedback

Modify an Email Address

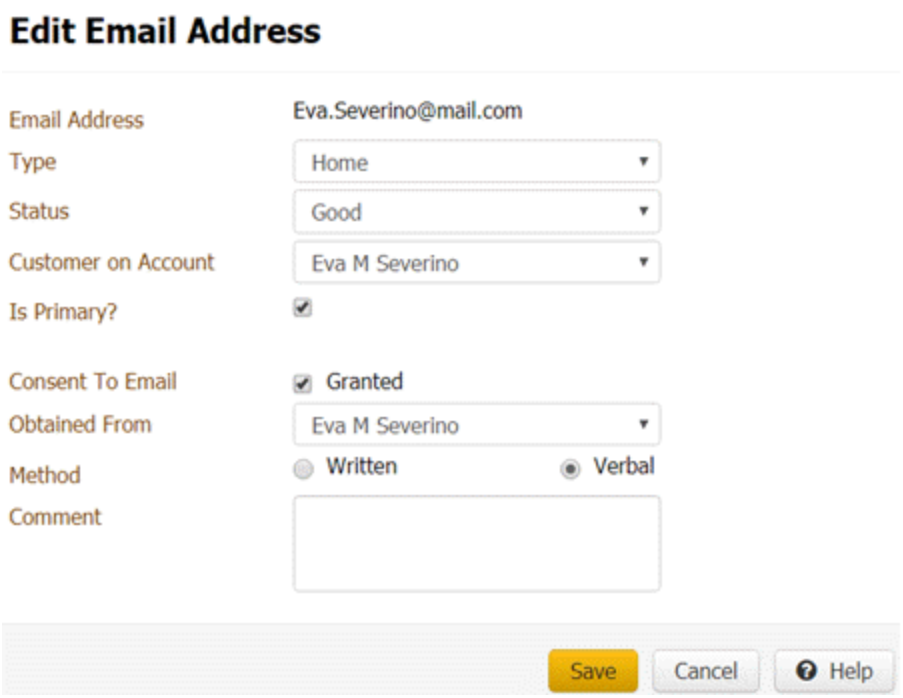
Use the **Edit Email Address** dialog box to modify an email address for the account. You can also modify permissions for sending email messages to an email address.

To modify an email address

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Address**.



2. In the data grid, click the email address and then, in the **Email Address** list box, click **Edit**.



Email Address: Person's email address (for example, jdoe@myprovider.com).

Type: Type of email address, such as home or work.

Status: Status of the email address, such as good, bad, or unknown.

Customer on Account: Person associated to the email address.

Is Primary: If selected, the email address is the person's primary (main) email address.

Consent To Email: If selected, the person granted permission to send email messages to this email address. If cleared, the person denied permission to send email messages to this email address.

Obtained From: Name of the person who granted or denied permission to send email messages to this email address.

Method: Indicates whether the person granted permission verbally or in writing.

Comment: More information regarding the email address.

3. Modify the information and then click **Save**.

Related Topics

Data Grids

Email Addresses

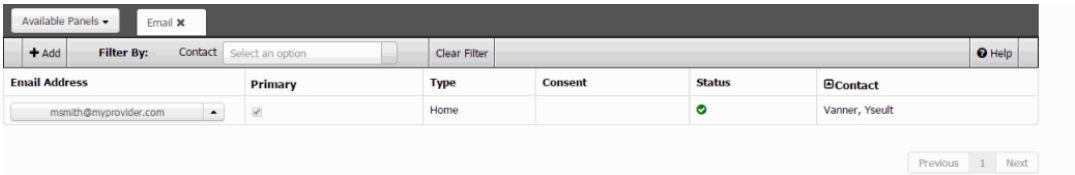
Feedback

Change the Status of an Email Address

Use the **Email** panel to change the status of an email address for the account.

To change the status of an email address

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Email**.



2. In the data grid, click the email address and then, in the **Email Address** list box, do one of the following:
    - If the email address is good, click **Good**.
    - If the email address is bad, click **Bad**.
    - If the email address is unknown, click **Unknown**.

Related Topics

Data Grids

Email Status Icons

Email Addresses

Feedback

Email Consent Icons

The following table lists the email consent icons and their description.

Icon	Description
	Person granted permission to send messages to this email address.
	Person denied permission to send messages to this email address.

Related Topics

Modify an Email Address

Email Addresses

Feedback

Email Status Icons

The following table lists the email status icons and their description.

Icon	Description
	Email address is good.
	Email address is bad.

	Email address status is unknown.

Related Topics

Change the Status of an Email Address

Email Addresses

Feedback

Send Email

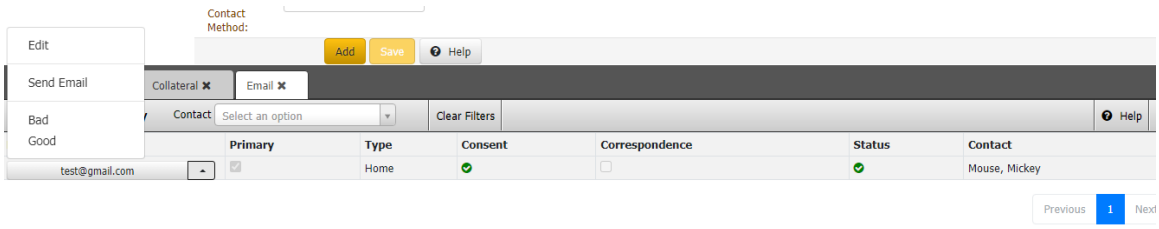
Use to send an Email from the selected record of the available Home/Work type Email.

To send an Email:

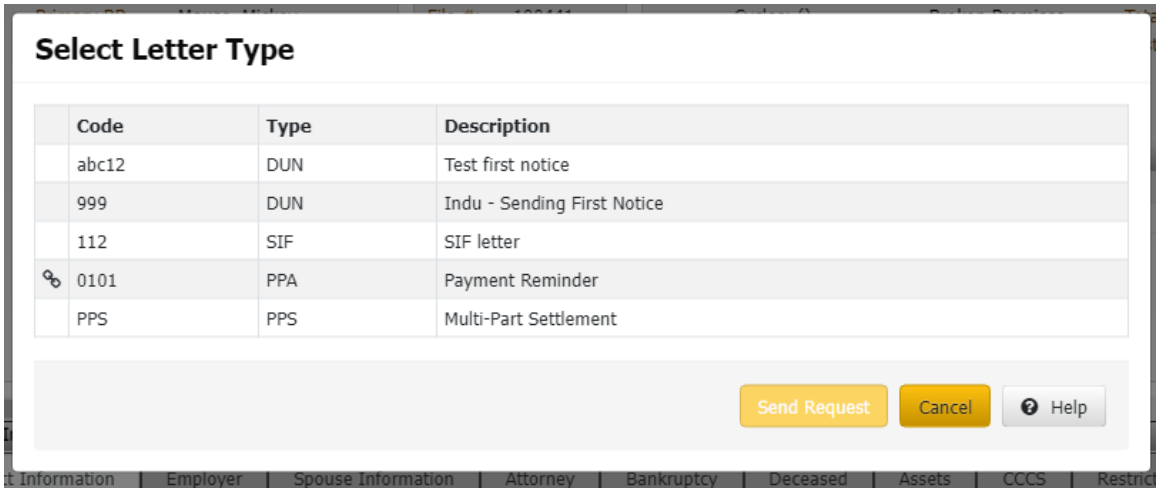
Do the following:

To send email

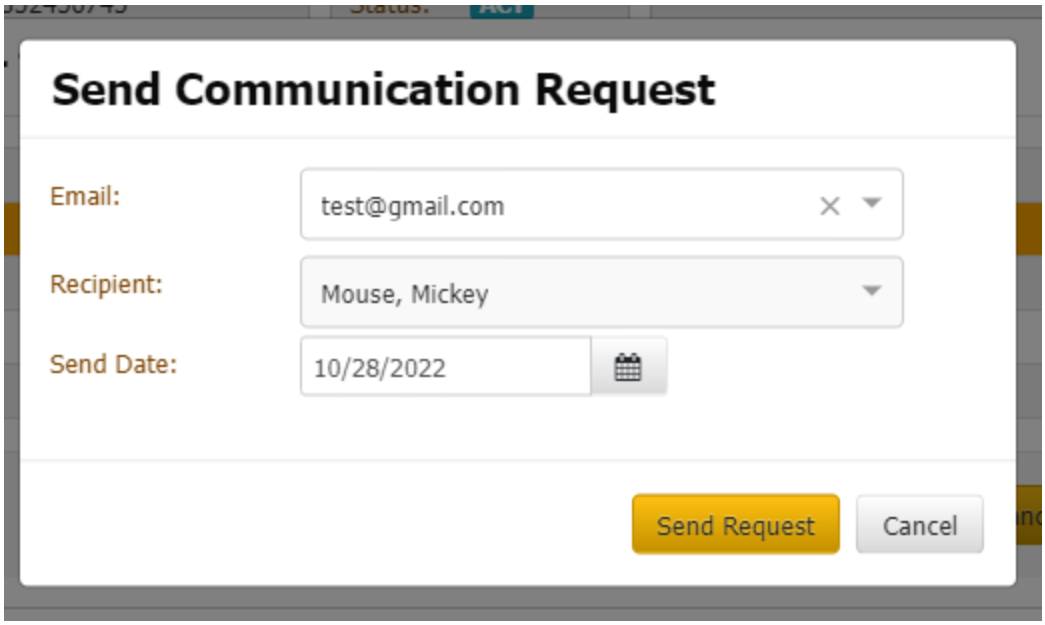
1. In the **Reference Panel** navigation bar, click **Available Panels** Email tab, click arrow select **Send Email** as shown.



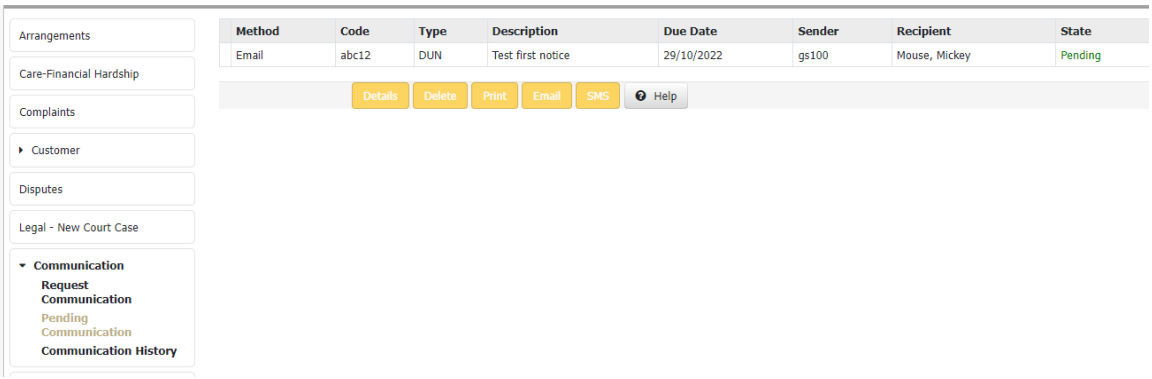
2. The list of Letter types will show, select any one and then click **Send request.**



- While sending **Communication Request** select Date, it can be **Current Date/Future Date**, then click **Send Request.**



4. Choosing the **Future Date**, the Communication request shows in the **Pending Communication Panels**.

5. 

Extra Data

Feedback

Extra Data

Use the **Extra Data** panel to view, add, and modify custom data for the account.

Related Topics

Add Extra Data

Modify Extra Data

Reference Panels Permission

Reference Panels

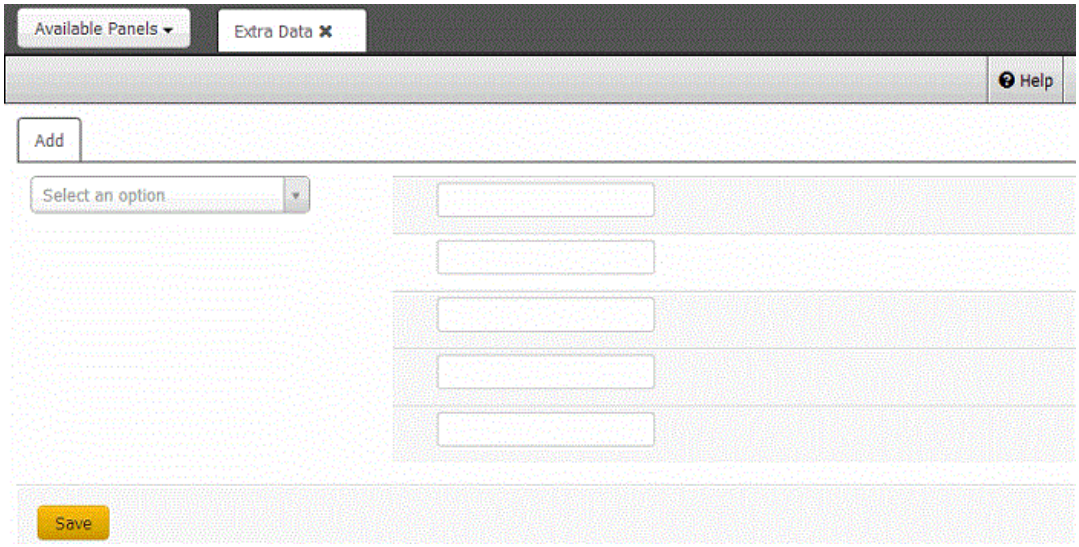
Feedback

Add Extra Data

Use the **Extra Data** panel to add custom data to the account. You must have the Create Extra Data Permission.

To add extra data

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Extra Data**.



2. In the extra data code list box, click the code to add. Boxes appear for the selected code.
3. Complete the information for each box and then click **Save**. A new tab for the specified extra data code appears on the **Extra Data** panel.

Related Topics

Modify Extra Data

Create Extra Data Permission

Extra Data Codes

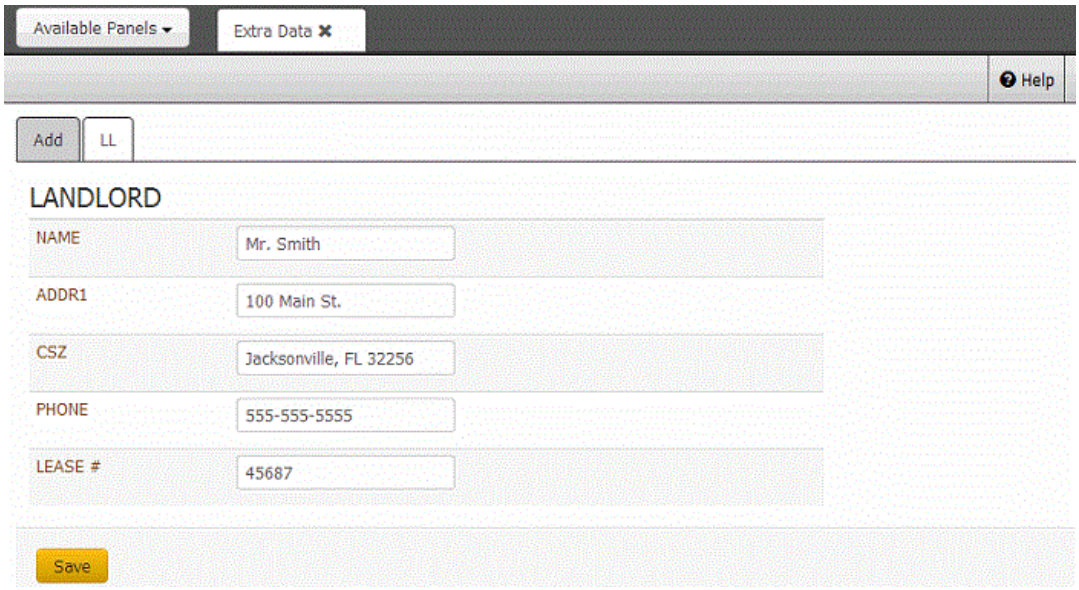
Feedback

Modify Extra Data

Use the **Extra Data** panel to modify extra data associated to the account. A tab appears on the **Extra Data** panel for each extra data code associated to the account. You must have the Update Extra Data Permission.

To modify extra data

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Extra Data**.
2. Click the tab for the extra data to modify.



3. Modify the information and then click **Save**.

Related Topics

Add Extra Data

Update Extra Data Permission

Extra Data Codes

Fusion Service History

Feedback

Fusion Service History

Use the **Fusion Service History** panel to view service requests for all parties on the account and the responses received from outside service providers. For example, your organization can request an address verification from an outside service. Users generate these requests and receive the responses using Fusion. For more information, see the *Fusion* documentation.

Related Topics

View Fusion Service History

Verify a Response From an Outside Service Provider

Reference Panels Permission

Reference Panels

Feedback

View Fusion Service History

Use the **Fusion Service History** panel to view service requests for all parties on the account and the responses received from outside service providers.

To view Fusion service history

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Fusion Service History**. The navigation tree is sorted by party name, service provider, and service request date and time.

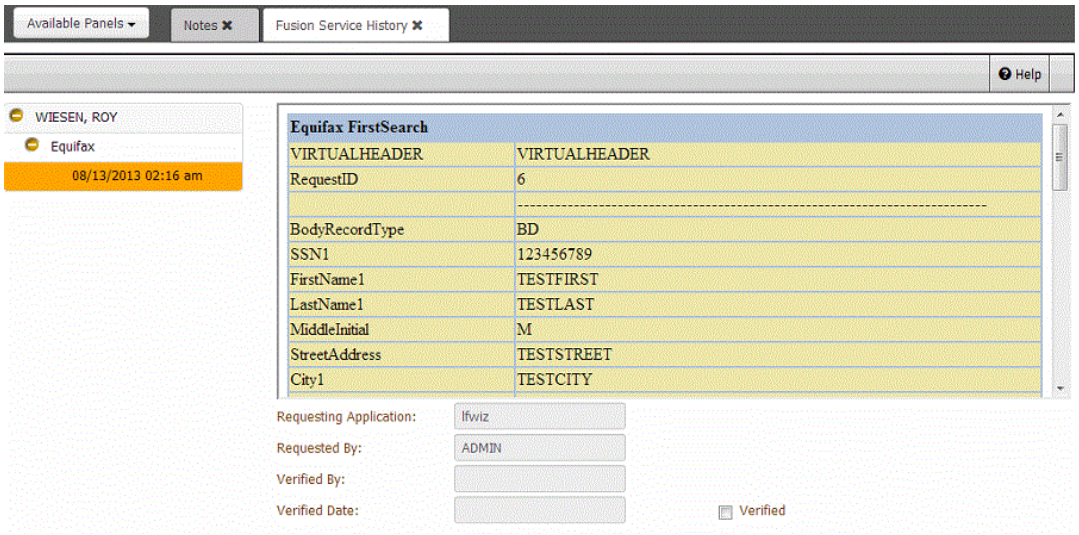
[Name]: Name of the party on the account for whom a user requested the service.

[Provider]: Name of the service provider.

[Date]: Date and time a user requested the service.

2. In the navigation tree, expand the party name and service provider nodes.

3. Click the date and time entry. The service history appears. If the system received a response from the service provide, it appears also.



[Data]: Data submitted with the service request to the outside service provider.

Requesting Application: Program that requested the service.

Requested by: User who requested the service.

Verified by: User who verified the response from the service provider.

Verified Date: Date a user verified the response.

Verified: If selected, a user verified the response.

Related Topics

Verify a Response From an Outside Service Provider

Feedback

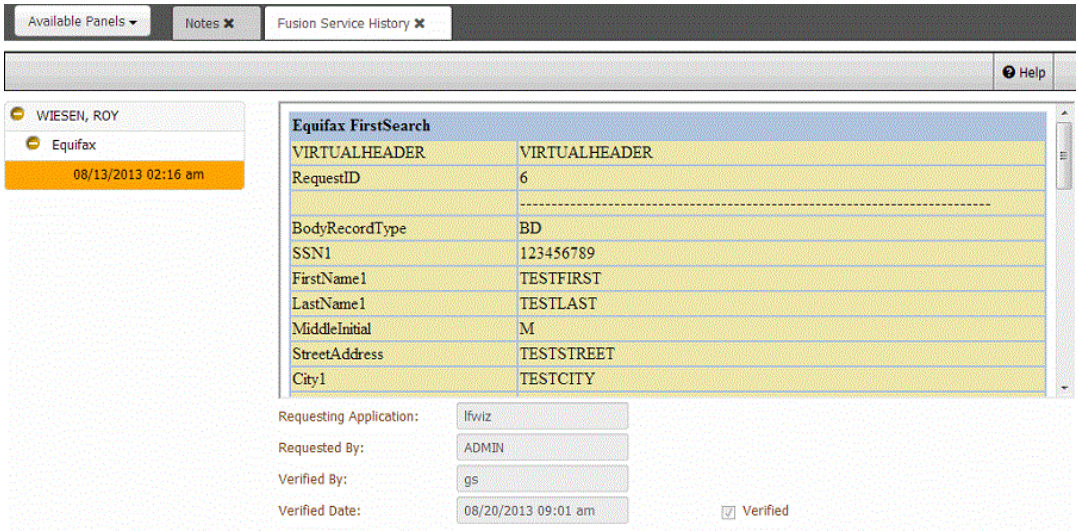
Verify a Response From an Outside Service Provider

Use the **Fusion Service History** panel to verify a response from an outside service provider for the account. You must have the Fusion Services - Verify Responses Permission.

To verify a response from an outside service provider

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Fusion Service History**.

2. In the navigation tree, expand the party name and service provider nodes.
3. Click the date and time entry. The service history appears.
4. Select the **Verified** check box. The system populates the **Verified By** box with your user name and populates the **Verified Date** box with the current date and time.



Related Topics

View Fusion Service History

Fusion Services - Verify Responses Permission

Income and Expenditures

Feedback

Income and Expenditures

Use the **Income and Expenditure** panel to maintain a customer's income and expenditures. Latitude uses this information to calculate the customer's monthly disposable income. This information assists you in arranging a successful payment plan with the customer. You must have the Maintain Income and Expense items Permission.

For a linked account, this panel depends on the account having a Personal Unique Record Number (PURN) value. The system only allows one active income and expense record for an individual PURN. If a PURN is associated to more than one account, Latitude displays the income and expense record for the PURN regardless of which account you are viewing. You can update income and expenses from any of the linked accounts.

Related Topics

Add Financial Summary Information

Add Income

Add Expenses

Add Arrears

View Income and Expenditure History

Reference Panels Permission

Reference Panels

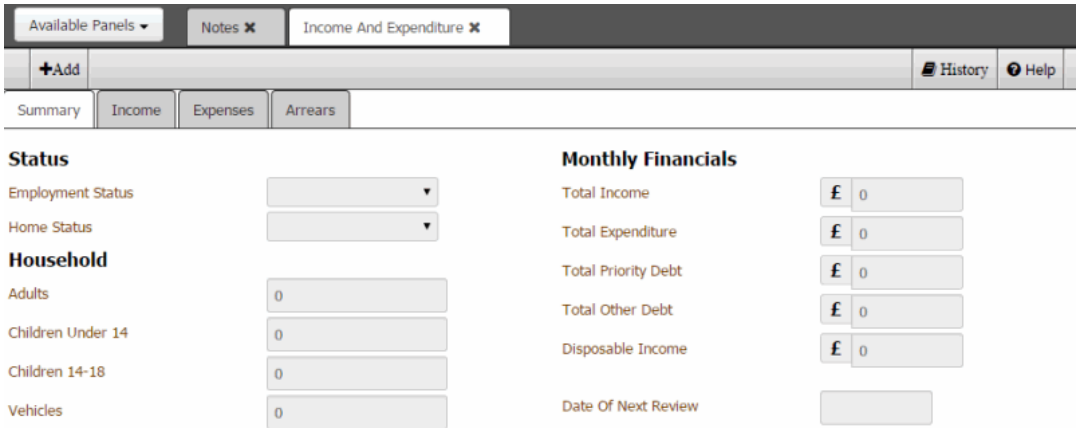
Feedback

Add Financial Summary Information

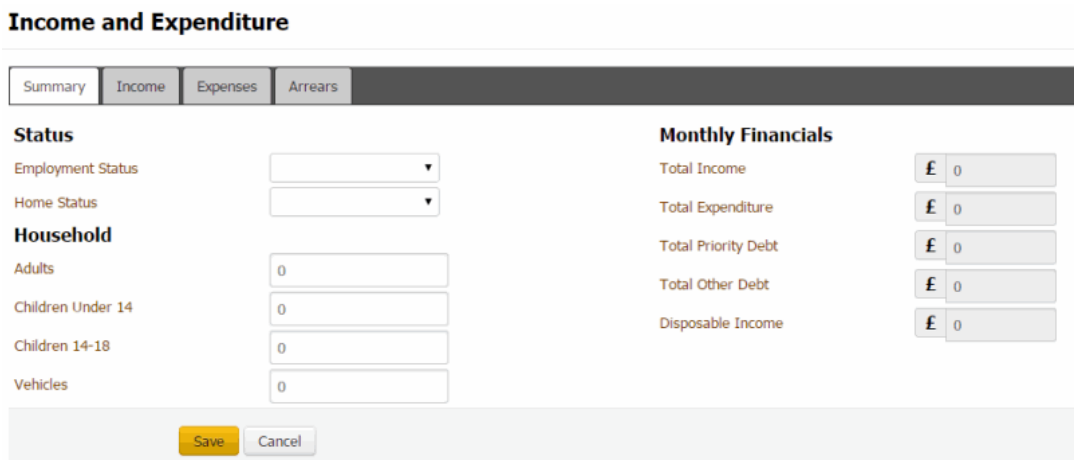
Use the **Summary** tab in the **Income and Expenditure** dialog box to add financial summary information to the account.

To add financial summary information

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Income and Expenditure**.



2. In the **Income and Expenditure** toolbar, click **Add** and then, in the **Income and Expenditure** dialog box, click the **Summary** tab.



Employment Status: Customer's employment status.

Home Status: Customer's home ownership or living situation.

Adults: Number of household members who are over the age of 18.

Children Under 14: Number of household members who are under the age of 14.

Children 14-18: Number of household members who are 14-18 years of age.

Vehicles: Number of vehicles in use for the household.

Total Income: Total amount of income from the **Income** tab. Latitude populates this box.

Total Expenditure: Total amount of expenses from the **Expense** tab. Latitude populates this box.

Total Priority Debt: Total amount of priority debt from the **Arrears** tab. Latitude populates this box.

Total Other Debt: Total amount of other debt from the **Arrears** tab. Latitude populates this box.

Disposable Income: Amount of monthly disposable income. Latitude calculates this value using the following formula: Total Income - (Total Expenses + Total Priority Debt + Total Other Debt).

Date Next Review: Next date to review the customer's financial situation.

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

Related Topics

Income and Expenditures

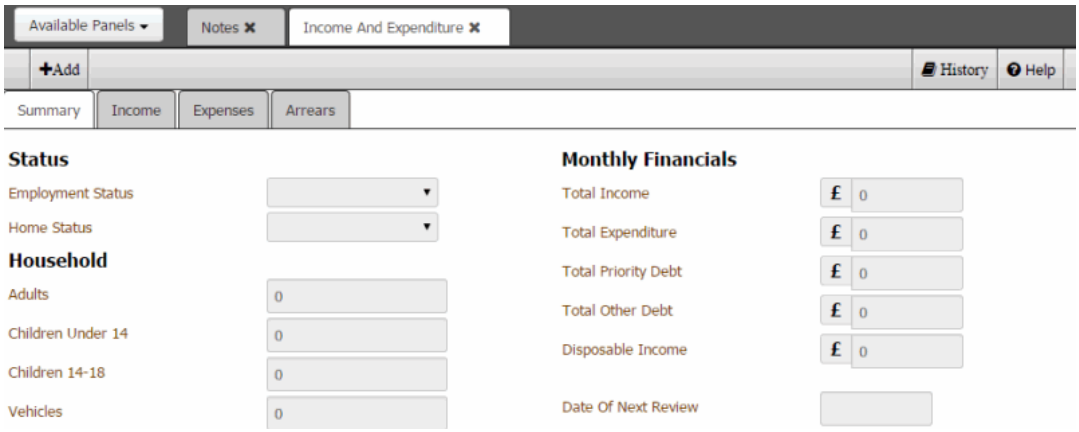
Feedback

Add Income

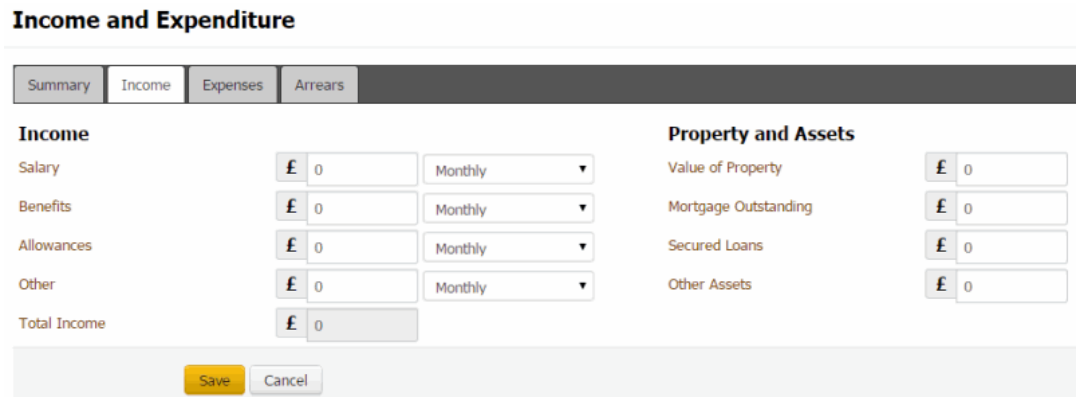
Use the **Income** tab to add income for the account.

To add income

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Income and Expenditure**.



2. In the **Income and Expenditure** toolbar, click **Add** and then click the **Income** tab.



Income

Salary: Amount of money the customer receives from salary, and the frequency received.

Benefits: Amount of money the customer receives from benefits, and the frequency received.

Allowances: Amount of money the customer receives from allowances, and the frequency received.

Other: Amount of money the customer receives from other sources, and the frequency received.

Total Income: Total income that the customer receives.

Property and Assets - The system doesn't include these amounts in calculations.

Value of Property: Monetary value of the customer's property.

Mortgage Outstanding: Amount of the customer's mortgage that is outstanding.

Secured Loans: Balance of the customer's secured loans.

Other Assets: Monetary value of the customer's other assets.

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

Related Topics

Income and Expenditures

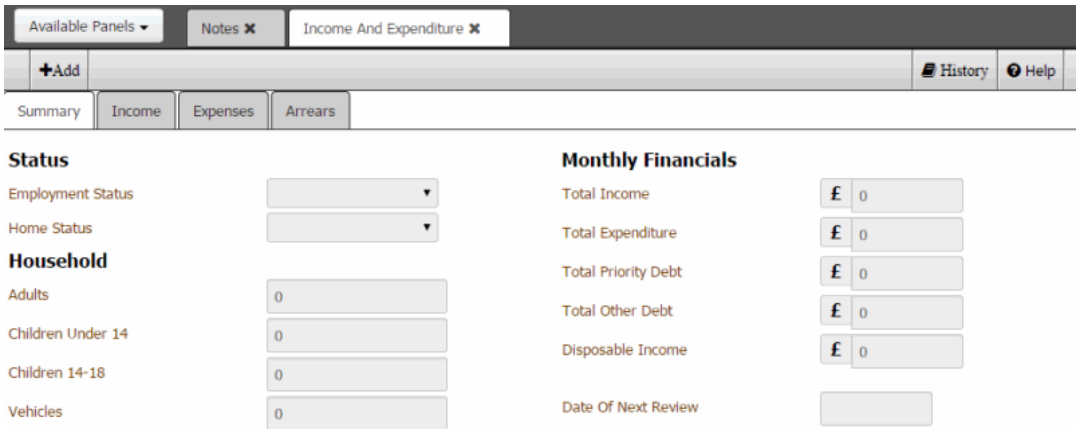
Feedback

Add Expenses

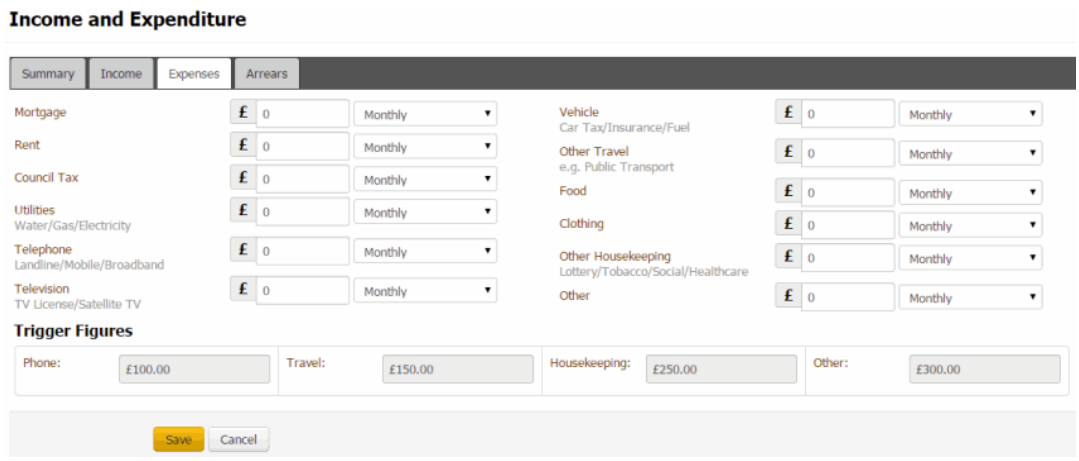
Use the **Expenses** tab to add expenses for the account. The **Trigger Figures** section displays the average expense amounts based on the number of people in the household and their ages. You must have the Trigger Values Permission to modify these amounts.

To add expenses

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Income and Expenditure**.



2. In the **Income and Expenditure** toolbar, click **Add** and then click the **Expenses** tab.



Mortgage: Mortgage expense and the frequency in which the customer incurs this expense.

Rent: Rent expense and the frequency in which the customer incurs this expense.

Council Tax: Council tax expense and the frequency in which the customer incurs this expense.

Utilities: Utilities expenses (including water, gas, and electricity) and the frequency in which the customer incurs this expense.

Telephone: Telephone expenses (including land line, mobile, and broadband) and the frequency in which the customer incurs this expense.

Television: Television expenses (including TV license and satellite TV) and the frequency in which the customer incurs this expense.

Vehicle: Vehicle expenses (including car tax, insurance, and fuel) and the frequency in which the customer incurs this expense.

Other Travel: Other travel expenses (such as public transportation) and the frequency in which the customer incurs this expense.

Food: Food expense and the frequency in which the customer incurs this expense.

Clothing: Clothing expenses and the frequency in which the customer incurs this expense.

Other Housekeeping: Other housekeeping expenses and the frequency in which the customer incurs this expense.

Other: Other expenses and the frequency in which the customer incurs this expense.

Trigger Figures - Trigger figures with a red background indicate that the actual expense exceeds the trigger value.

Phone: Maximum amount that your organization considers normal for telephone expenses.

Travel: Maximum amount that your organization considers normal for travel expenses. Travel expenses include car tax, insurance, fuel, and other travel expenses such as public transport.

Housekeeping: Maximum amount that your organization considers normal for housekeeping expenses. Housekeeping expenses include food, clothing, lottery, tobacco, social, and healthcare.

Other: Maximum amount that your organization considers normal for other expenses.

1.

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

Related Topics

Income and Expenditures

Trigger Values Permission

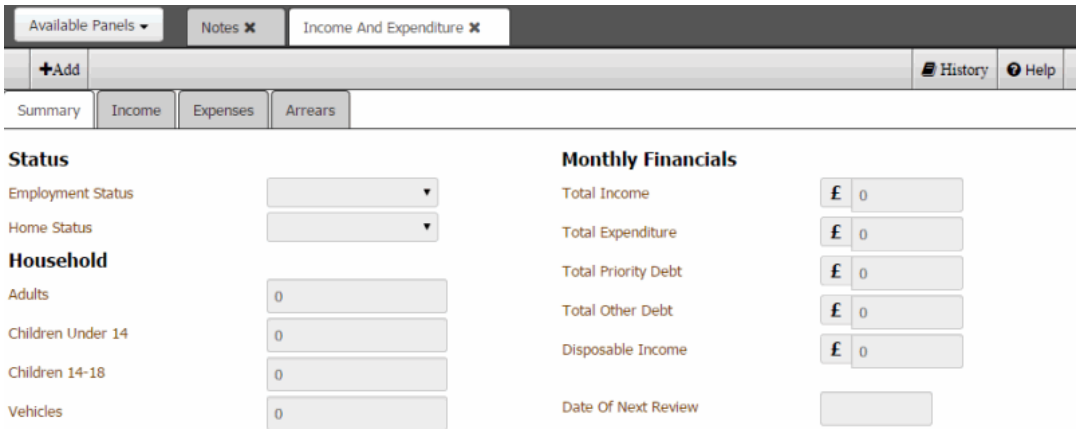
Feedback

Add Arrears

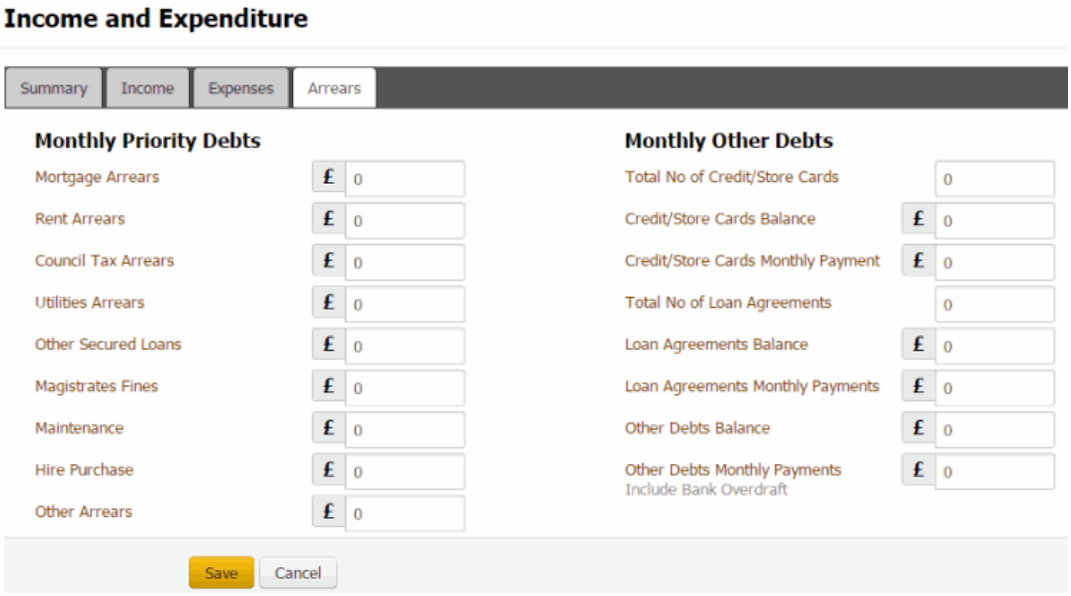
Use the **Arrears** tab to add past due debt for the account.

To add arrears

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Income and Expenditure**.



2. In the **Income and Expenditure** toolbar, click **Add** and then click the **Arrears** tab.



Mortgage Arrears: Overdue mortgage amount.

Rent Arrears: Overdue rent amount.

Council Tax Arrears: Overdue council tax amount.

Utilities Arrears: Overdue utilities amount.

Other Secured Loans: Overdue secured loan amount.

Magistrates Fines: Overdue magistrate fines.

Maintenance: Overdue maintenance amount.

Hire Purchase: Overdue vehicle "hire purchase" amount.

Other Arrears: Overdue other amount.

Total No of Credit/Store Cards: Total number of credit cards and store cards.

Credit/Store Cards Balance: Total balance owed on the credit cards and store cards.

Credit/Store Cards Monthly Payment: Monthly payment amount for the credit cards and store cards.

Total No of Loan Agreements: Total number of loan agreements.

Loan Agreements Balance: Total balance owed on the loan agreements.

Loan Agreements Monthly Payments: Monthly payment amount for the loan agreements.

Other Debts Balance: Balance of other debts.

Other Debts Monthly Payments: Monthly payment amount for other debts.

Type: Type of arrearage, such as priority or non-priority.

Description: Description of the arrearage.

Amount: Amount of the arrearage.

Frequency: Frequency in which the arrearage is due.

Repayment Offer: Amount the customer proposes to repay each month.

CCJ: County Court Judgments.

Monthly Total: Total arrearage amount.

Total Priority Creditors: Total number of priority creditors whose claims are paid before non-priority creditors.

Total Non-Priority Creditors: Total number of non-priority creditors whose claims are paid after priority creditors.

Total Number CCJs: Total number of county court judgments.

Notes: Information about the arrearage.

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

Related Topics

Income and Expenditures

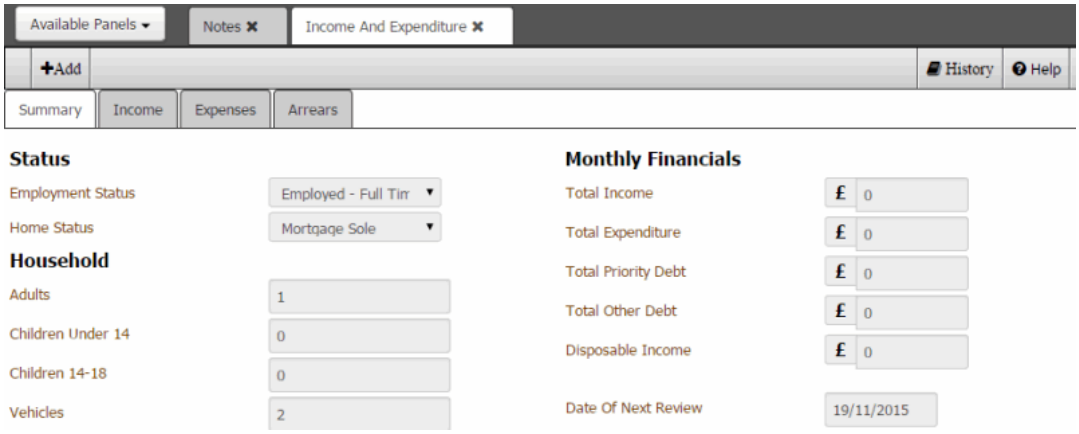
Feedback

View Income and Expenditure History

Use the **Income and Expenditure History** dialog box to view the account's income and expenditure history. You can also replace information on the tabs in the **Income and Expenditures** panel with historical information.

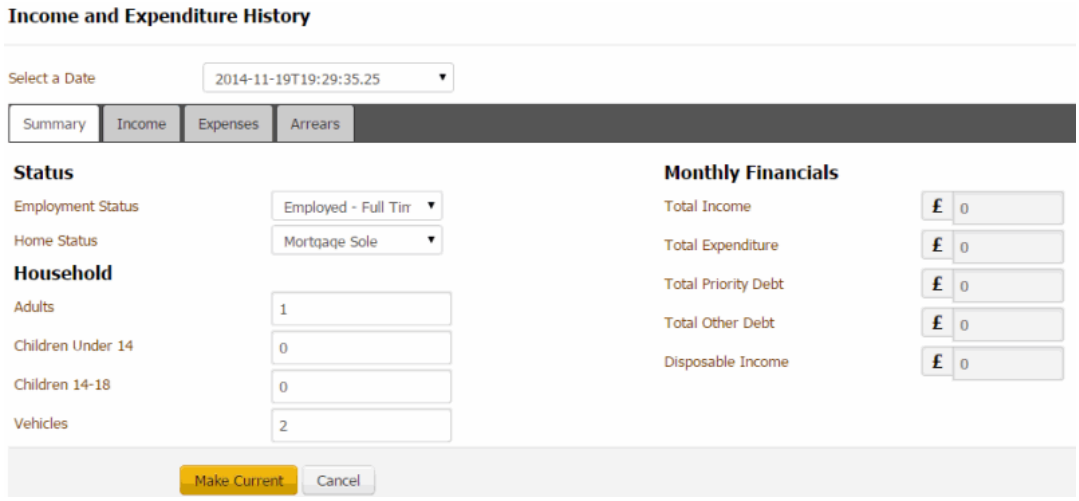
To view income and expenditure history

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Income and Expenditure**.



2. In the **Income and Expenditure** toolbar, click **History**. The **Income and Expenditure History** dialog box appears.

3. In the **Select a Date** list box, click a date. Historical information for the specified date appears.



4. Click a tab to view its information.

5. To replace information on the **Income and Expenditures** panel with this historical information, click **Make Current**.

Related Topics

Income and Expenditures

Interest Accrual

Interest Accrual Tracking Panel

Use the Interest Accrual Tracking panel to view accrued interest for an account. It is a ready-only panel. The ability to view the Interest Accrual Tracking panel is based on your permissions.

Related Topics

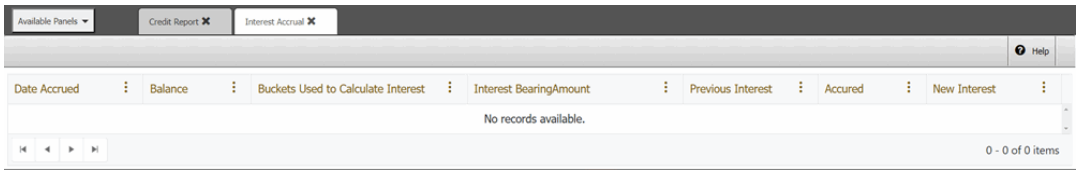
View Interest Accrual

View Interest Accrual Tracking Panel

Use the Interest Accrual Tracking panel to view accrued interest for an account. You must have Reference Panels Permission enabled with Interest Accrual selected in Available Panels section, to view Interest Accrual Tracking panel.

To view interest accrual tracking panel

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click I**nterest Accrual**.



Data Accrued: Date Latitude calculated the interest.

Balance: Current account balance including interest.

Buckets Used to calculate Interest: Money bucket that Latitude used to calculate interest.

Interest Bearing Amount: Amount in the money bucket indicated that Latitude used to calculate interest.

Previous Interest: Amount of interest that Latitude calculated on the previous accrual date.

Accrued: Amount of interest that Latitude calculated on the accrual date.

New Interest: Total amount of interest that has accumulated on the debt (sum of the amounts in the Accrued column).

Interactions and Events

Feedback

Interactions and Events

Use the **Interactions** panel to view interactions with the account (for example, the system or a user added a note). An interaction is a group of events that occur while an account is open in the Agent Desktop. Use the **Events** panel to view the actions that occurred on the account (for example, a user changed the account status). You can use this information for auditing purposes.

Related Topics

View Account Interactions

View Events for an Account

Interaction Icons

Add Note

Reference Panels Permission

Reference Panels

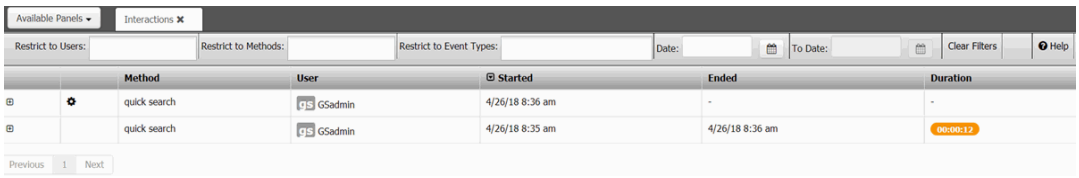
Feedback

View Account Interactions

Use the **Interactions** panel to view interactions for the account. Interactions include phone calls, texts, email messages, and letters.

To view account interactions

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Interactions**. The **Interactions** panel appears.



Restrict to Users: If selected, only displays the interactions that the specified user created.

Restrict to Methods: If selected, only displays the interactions that match the specified method.

Restrict to Event Types: If selected, only displays the interactions that match the specified event type.

Date: If selected, only displays the interactions that match the specified date.

To Date: When used with the **Date** filter, only displays the interactions that fall within the specified date range. For example, if the Date value is 01/01/2018 and the To Date value is 04/24/2018, only interactions with a date that falls on or between 01/01/2018 and 04/24/2018 display.

Clear Filters: Clears the specified filters and displays all interactions.

Icons: Icons that indicate whether a user worked the account, attempted to contact a party on the account, or contacted a party on the account based on the interaction. For more information, see Interaction Icons.

Method: Interaction that occurred.

User: User who started the interaction.

Started: Date and time the interaction started.

Ended: Date and time the interaction ended.

Duration: Length of time between the start and end of the interaction.

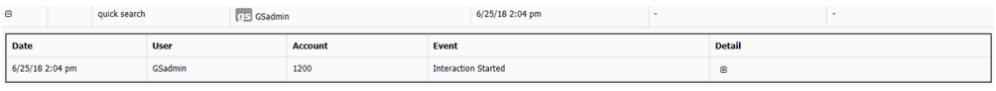
2. To display only the interactions that meet specific criteria, do one or more of the following:

   - To limit the interactions to a specific user, in the **Restrict to Users** box, click the user.
   - To limit the interactions to a specific method, in the **Restrict to Methods** box, click the method.
   - To limit the interactions to a specific event type, in the **Restrict to Event Types** box, click the event type.
   - To limit the interactions to a specific date, click in the **Date** box and then select the date from the calendar.
   - To limit the interactions to a specific date range, click in the **Date** box and then select the start date from the calendar. Click in the **To Date** box and then select the end date from the calendar.

   Only the interactions that match the selected criteria appear in the panel.

Tip: To clear the selected filters, click **Clear Filters**. All interactions appear in the panel.

3. To view more information for an interaction, click the plus sign (**+**) in the first column. More information for the interaction appears.



4. To view details for an interaction, click the plus sign (**+**) in the Detail column. Detailed information for the interaction appears.

Tip: To hide the details, click the minus sign (**-**).

Related Topics

View Events for an Account

Interaction Icons

Feedback

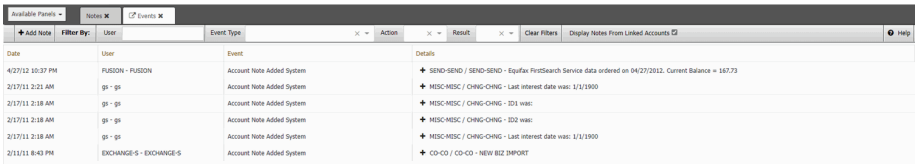
View Events for an Account

Use the **Events** panel to view events that occurred on the account. You must have the Event Details Display View Permission to view detailed description of events.

To view events for an account

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Events**.

Note: To pop out the **Events** tab, click icon. If you exit the **Events** pop-up window, then it will get attached as a tab again.



Add Note: To add notes for an event. For more information, see Add Note.

User: Type the user to display only the rows with events that match the specified user criteria in the data grid.

Event Type: If selected, only displays events that match the specified event type.

Action: If selected, displays the events that match the specified criteria.

Notes:

- You can select either Action or Result for filtering, but not both. Only for the **Account Note Added** Event Type, Action and Result are displayed in details.
- After applying Action or Result filters, if you click **Clear Filter**, then you can view all events again.

Result: If selected, displays the events that match the specified criteria.

Display Notes From Linked Accounts: If selected, displays notes for this account and the accounts linked to this account. If cleared, displays notes for this account only.

Date: Date and time the event occurred. To change the sort order, click the arrow in the Date column heading.

User: ID and name of the user who started the event.

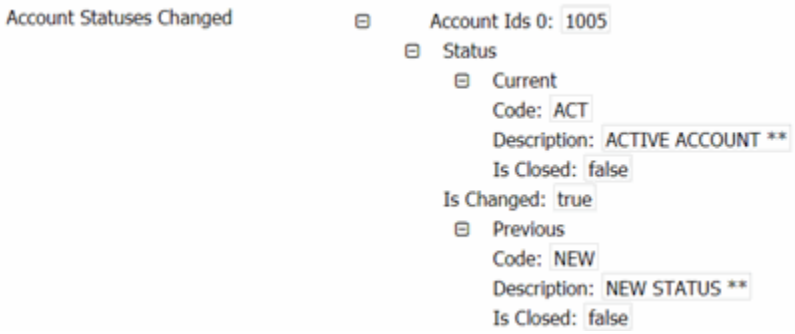
Event: Event that occurred.

Detail: Information about the event.

2. To limit the interactions to a specific event type, in the **Event Type** box, click the event type. Only the events that match the specified event type appear in the panel.

Tip: To clear the filter, click in the **Event Type** box and then click the blank option. All events appear in the panel.

3. To view details for an event, in the Detail column, click the plus sign (+). The event details appear.



Tip: To hide the details, click the minus sign (-).

Related Topics

View Account Interactions

Interaction Icons

Add Note

Feedback

Interaction Icons

The following table lists the interaction icons and their description. An interaction can have up to three icons.

Icon	Description
	Attempted. A user attempted to contact a party on the account.
	Contacted. A user contacted a party on the account.
	Worked. A user worked the account (for example, updated data successfully).

Related Topics

View Account Interactions

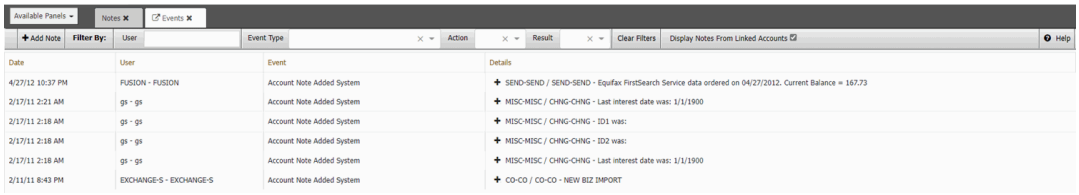
View Events for an Account

Add Note

Use the **Add Note** dialog box to add a note to the account. You must have the Create Notes Permission. To flag a note as private, you must have the Create Private Notes Permission and to view private note, you must have the View Private Notes Permission.

To add a note

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Events**.



2. In the **Events** toolbar, click **Add Note**. For more information on adding a note, see Add an Account Note.

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

Related Topics

Data Grids

Email Addresses

Medical

Feedback

Medical

Use the **Medical** panel to add and modify medical patient, medical insurance, next of kin, and medical facility information for the account.

Related Topics

Add Patient Information

Modify Patient Information

Add an Insurance Policy

Modify an Insurance Policy

Invalidate an Insurance Policy

Add Next of Kin

Modify Next of Kin

Add a Medical Facility

Modify a Medical Facility

Reference Panels Permission

Reference Panels

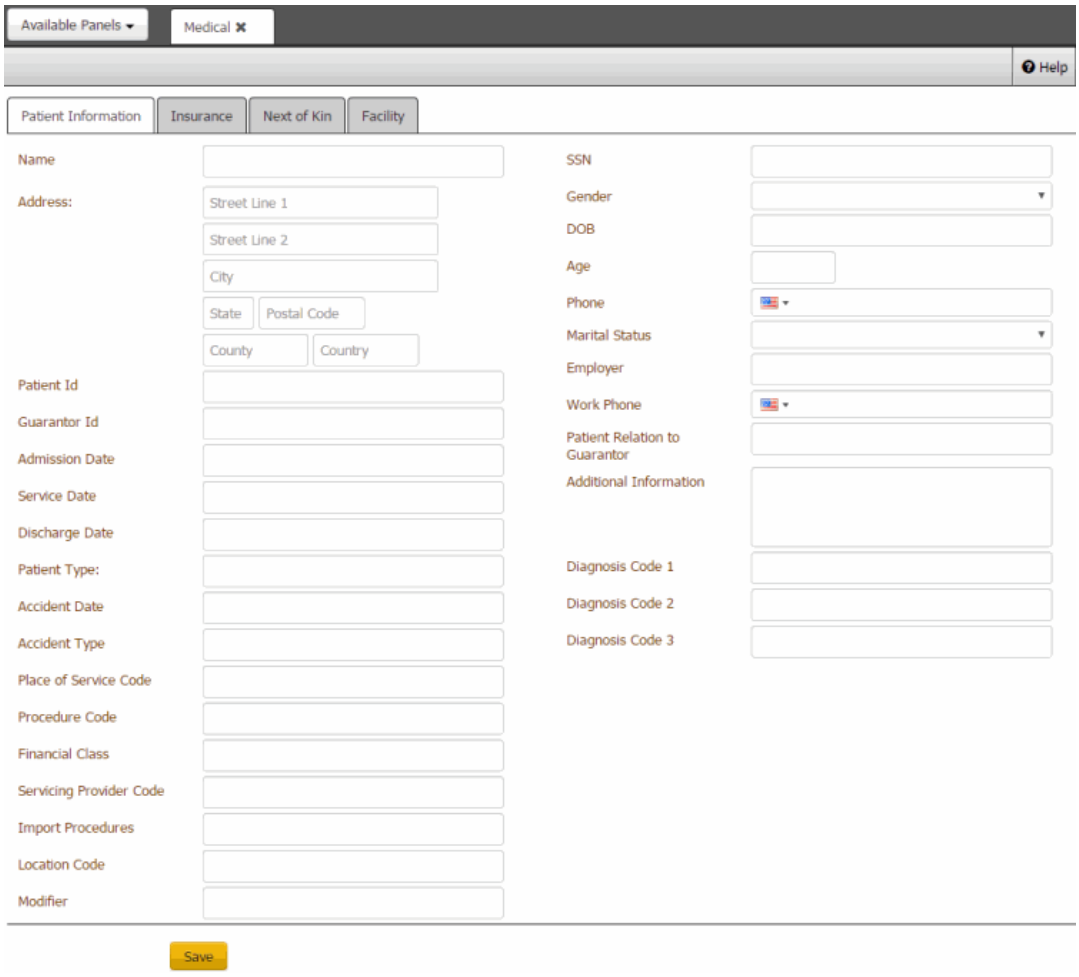
Feedback

Add Patient Information

Use the **Patient Information** tab in the **Medical** panel to add patient information to the account.

To add patient information

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Medical**.
2. Click the **Patient Information** tab.



Name: Patient's name.

Address: Patient's street address line 1, line 2, city, state, postal code, county, and country.

Patient ID: Code that the medical facility assigned to identify the patient.

Admission Date: Date the medical facility admitted the patient.

Service Date: Date the patient received medical care.

Discharge Date: Date the medical facility discharged the patient.

Patient Type: Code assigned during the registration or admission process to identify the type of patient (for example, emergency or day surgery).

Accident Date: Date the patient had an accident that required medical attention.

Accident Type: Type of accident that the patient had.

Place of Service Code: Code that identifies the place that rendered service to the patient.

Procedure Code: Code that identifies the medical procedure that the patient received.

Financial Class: Code that identifies the patient's primary insurance to bill first for services.

Servicing Provider Code: Code that identifies the health care provider.

Import Procedures: Code that identifies a specific surgical, medical, or diagnostic intervention.

Location Code: Code that identifies the location where the patient received medical care.

Modifier: Code that identifies a medical service or procedure.

SSN: Patient's social security number.

Gender: Patient's gender.

DOB: Patient's date of birth.

Age: Patient's age.

Phone: Patient's phone number.

Marital Status: Patient's marital status.

Employer: Name of patient's employer.

Work Phone: Patient's work phone number.

Patient Relation to Guarantor: Patient's relationship to the person guaranteeing payment for medical care.

Additional Information: More information regarding the patient.

Diagnosis Code 1-3: Code that identifies the patient's medical diagnosis.

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

Related Topics
Medical

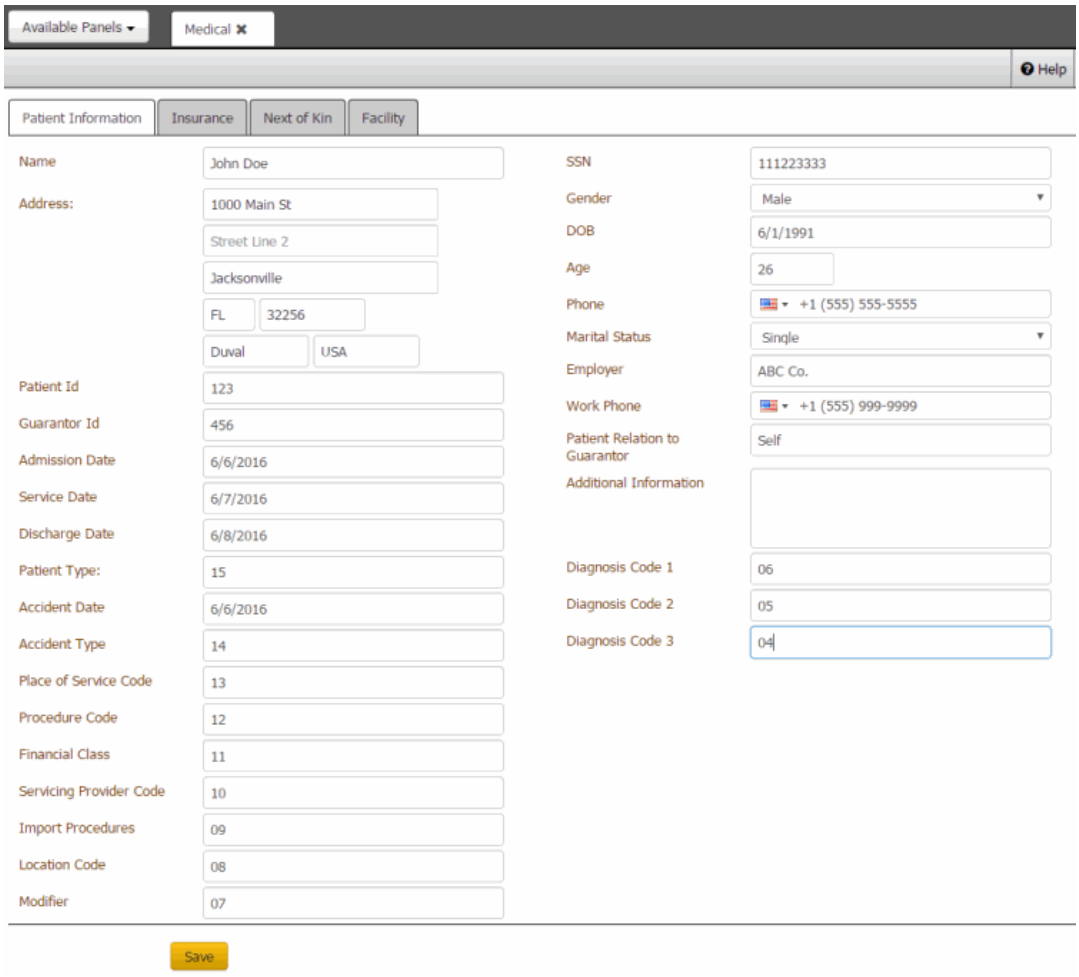
Feedback

Modify Patient Information

Use the **Patient Information** tab in the **Medical** panel to modify patient information for the account.

To modify patient information

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Medical**.
2. Click the **Patient Information** tab.



Name: Patient's name.

Address: Patient's street address line 1, line 2, city, state, postal code, county, and country.

Patient ID: Code that the medical facility assigned to identify the patient.

Admission Date: Date the medical facility admitted the patient.

Service Date: Date the patient received medical care.

Discharge Date: Date the medical facility discharged the patient.

Patient Type: Code assigned during the registration or admission process to identify the type of patient (for example, emergency or day surgery).

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Procedure Code: Code that identifies the medical procedure that the patient received.

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Servicing Provider Code: Code that identifies the health care provider.

Import Procedures: Code that identifies a specific surgical, medical, or diagnostic intervention.

Location Code: Code that identifies the location where the patient received medical care.

Modifier: Code that identifies a medical service or procedure.

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Gender: Patient's gender.

DOB: Patient's date of birth.

Age: Patient's age.

Phone: Patient's phone number.

Marital Status: Patient's marital status.

Employer: Name of patient's employer.

Work Phone: Patient's work phone number.

Patient Relation to Guarantor: Patient's relationship to the person guaranteeing payment for medical care.

Additional Information: More information regarding the patient.

Diagnosis Code 1-3: Code that identifies the patient's medical diagnosis.

3. Modify the information and then click **Save**.

Related Topics

Medical

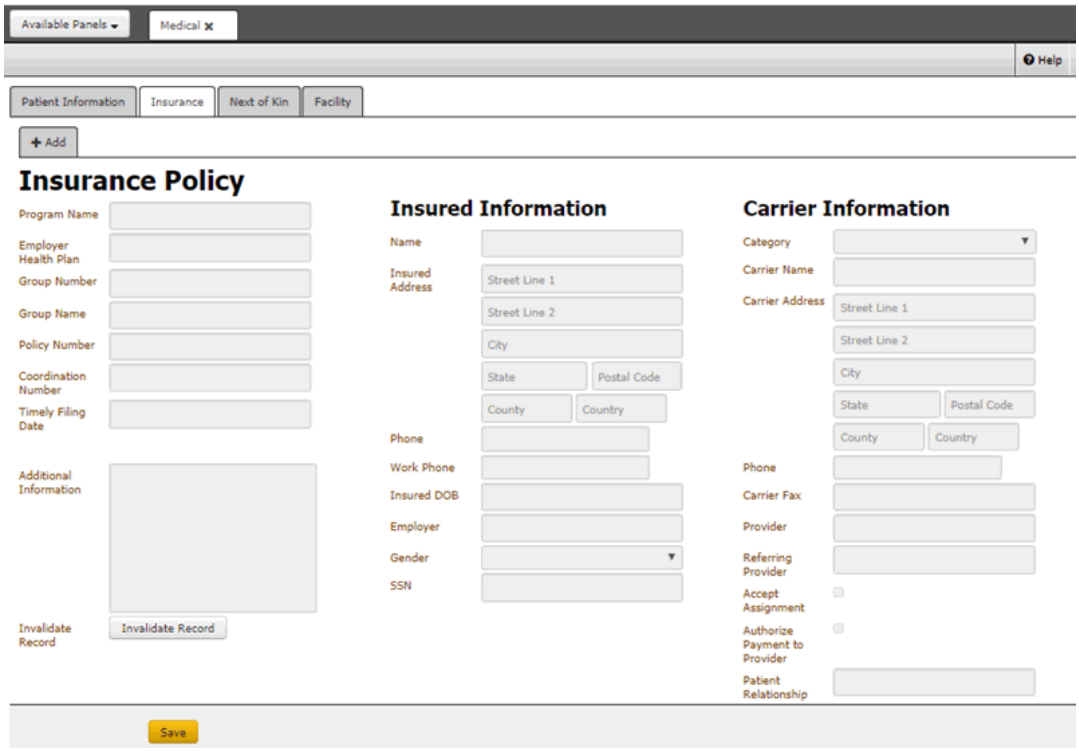
Feedback

Add an Insurance Policy

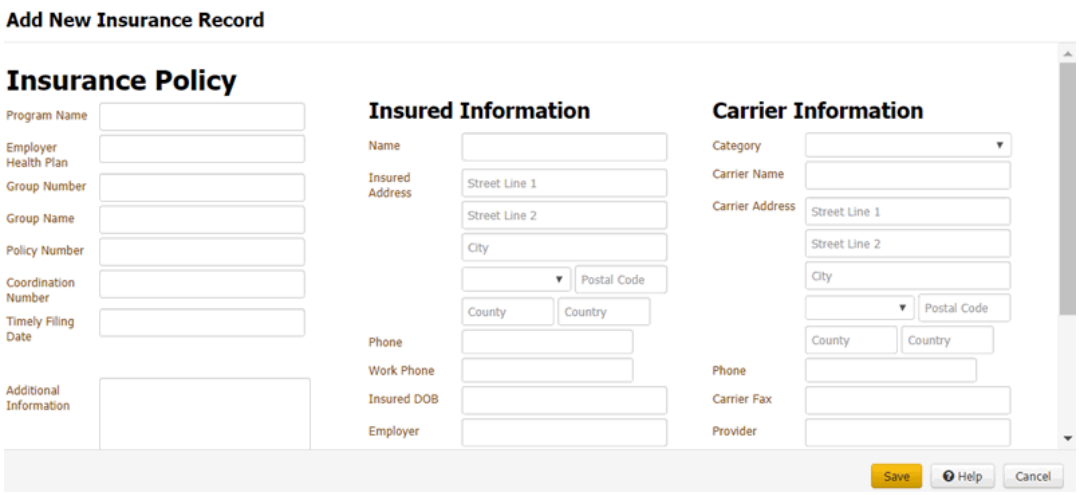
Use the **Insurance** tab in the **Medical** panel to add an insurance policy to the account.

To add an insurance policy

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Medical**.
2. Click the **Insurance** tab.



3. Click **+ Add**.



Program Name: Name of the insured person's insurance program.

Employer Health Plan: Name of the employer's healthcare plan.

Group Number: Number that identifies the employer's group insurance plan.

Group Name: Name of the employer's group insurance plan.

Policy Number: Number that the insurance company assigned to identify the insured person's health insurance policy.

Coordination Number: Number that identifies the health insurance plan when a patient has more than one (for example, a primary and secondary healthcare plan).

Timely Filing Date: Deadline for billing the insurance company.

Additional Information: More information about the patient's health insurance.

Name: Insured person's name.

Insured Address: Insured person's street address line 1, line 2, city, state, postal code, county, and country.

Phone: Insured person's phone number.

Work Phone: Insured person's work phone number.

Insured DOB: Insured person's date of birth.

Employer: Name of Insured person's employer.

Gender: Insured person's gender.

SSN: Insured person's social security number.

Category: Type of insurance (for example, primary or secondary). The values available in the list box are based on what your organization defined using List Codes.

Carrier Name: Insurance carrier's name.

Carrier Address: Insurance carrier's street address line 1, line 2, city, state, postal code, county, and country.

Phone: Insurance carrier's phone number.

Carrier Fax: Insurance carrier's fax number.

Provider: Name of the healthcare provider.

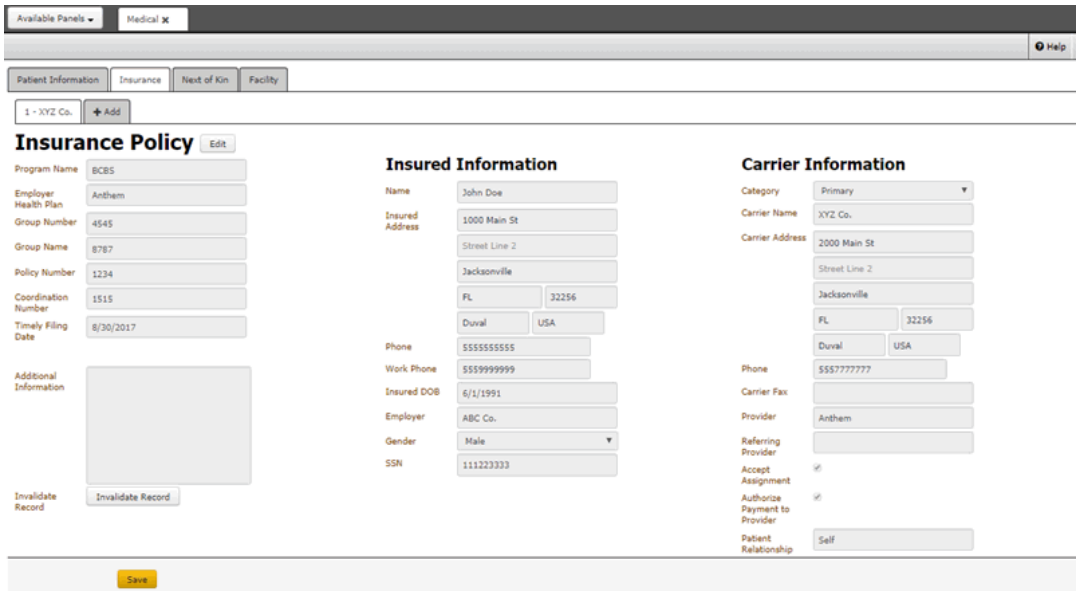
Referring Provider: Name of the referring healthcare provider.

Accept Assignment: If selected, the healthcare provider agreed to accept assignment from the insurance provider.

Authorize Payment to Provider: If selected, the insurance provider authorized payment to the healthcare provider.

Patient Relationship: Patient's relationship to the insured person.

4. Complete the information and then click **Save**. The system adds a tab for the insurance policy on the **Insurance** tab in the **Medical** panel.



Related Topics

Medical

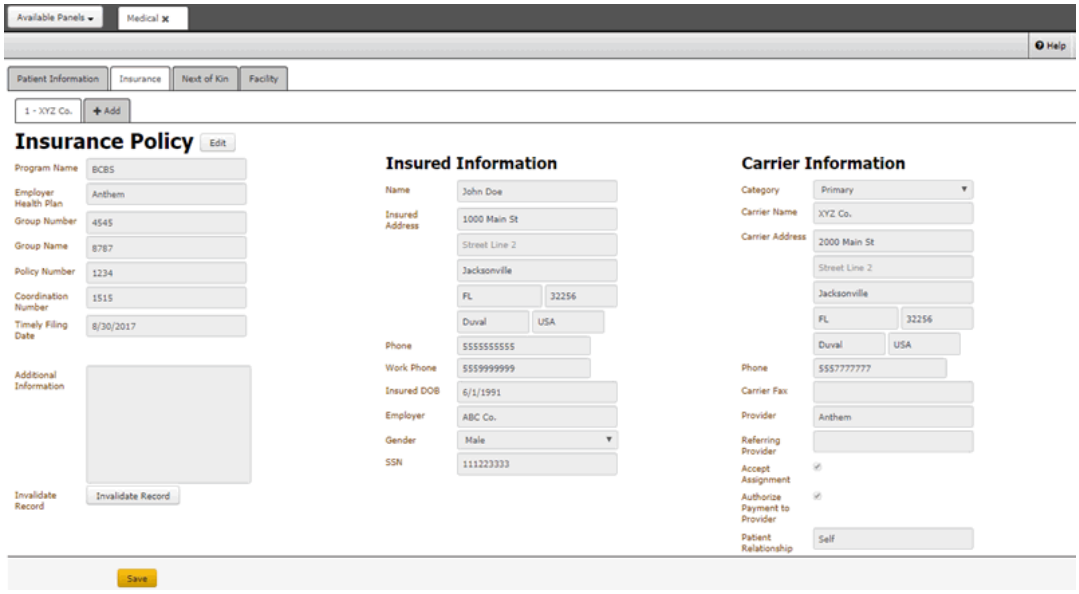
Feedback

Modify an Insurance Policy

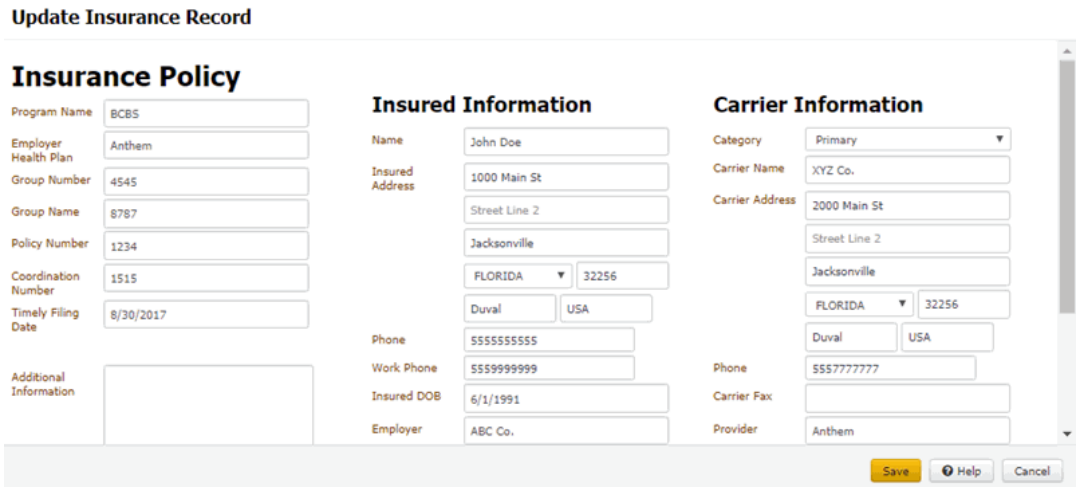
Use the **Insurance** tab in the **Medical** panel to modify an insurance policy for the account.

To modify an insurance policy

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Medical**.
2. Click the **Insurance** tab.
3. Click the tab for the policy to edit.



4. Click **Edit**.



Program Name: Name of the insured person's insurance program.

Employer Health Plan: Name of the employer's healthcare plan.

Group Number: Number that identifies the employer's group insurance plan.

Group Name: Name of the employer's group insurance plan.

Policy Number: Number that the insurance company assigned to identify the insured person's health insurance policy.

Coordination Number: Number that identifies the health insurance plan when a patient has more than one (for example, a primary and secondary healthcare plan).

Timely Filing Date: Deadline for billing the insurance company.

Additional Information: More information about the patient's health insurance.

Name: Insured person's name.

Insured Address: Insured person's street address line 1, line 2, city, state, postal code, county, and country.

Phone: Insured person's phone number.

Work Phone: Insured person's work phone number.

Insured DOB: Insured person's date of birth.

Employer: Name of Insured person's employer.

Gender: Insured person's gender.

SSN: Insured person's social security number.

Category: Type of insurance (for example, primary or secondary). The values available in the list box are based on what your organization defined using List Codes.

Carrier Name: Insurance carrier's name.

Carrier Address: Insurance carrier's street address line 1, line 2, city, state, postal code, county, and country.

Phone: Insurance carrier's phone number.

Carrier Fax: Insurance carrier's fax number.

Provider: Name of the healthcare provider.

Referring Provider: Name of the referring healthcare provider.

Accept Assignment: If selected, the healthcare provider agreed to accept assignment from the insurance provider.

Authorize Payment to Provider: If selected, the insurance provider authorized payment to the healthcare provider.

Patient Relationship: Patient's relationship to the insured person.

5. Modify the information and then click **Save**.

Related Topics

Medical

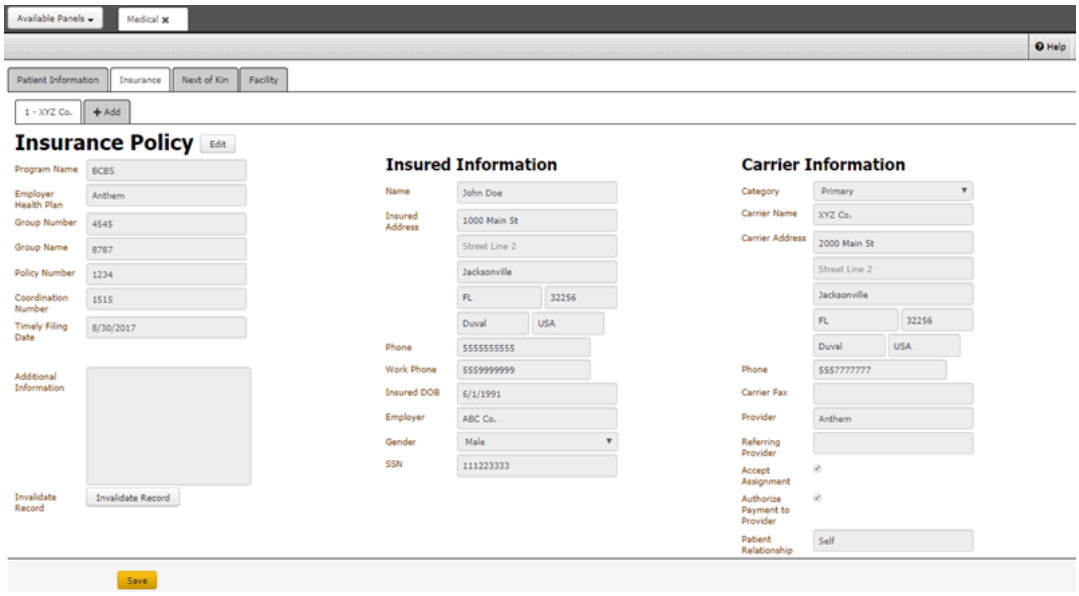
Feedback

Invalidate an Insurance Policy

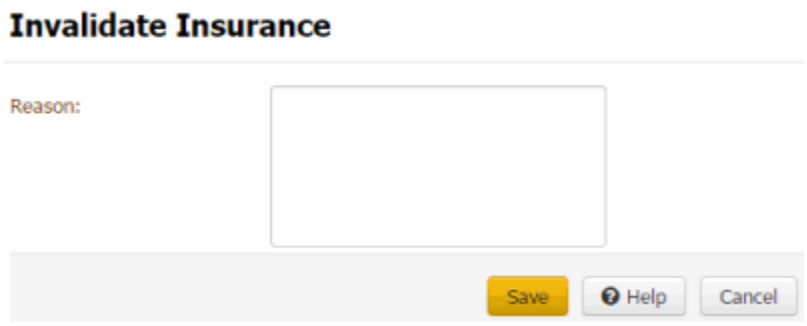
Use the **Insurance** tab in the **Medical** panel to flag an insurance policy as invalid for the account.

To invalidate an insurance policy

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Medical**.
2. Click the **Insurance** tab.
3. Click the tab for the policy to invalidate.



4. Click **Invalidate Record**.



5. In the **Reason** box, type the reason the policy is invalid and then click **Save**. The system displays a red bar and a message across the top of the policy tab to indicate that the policy is invalid.

Related Topics

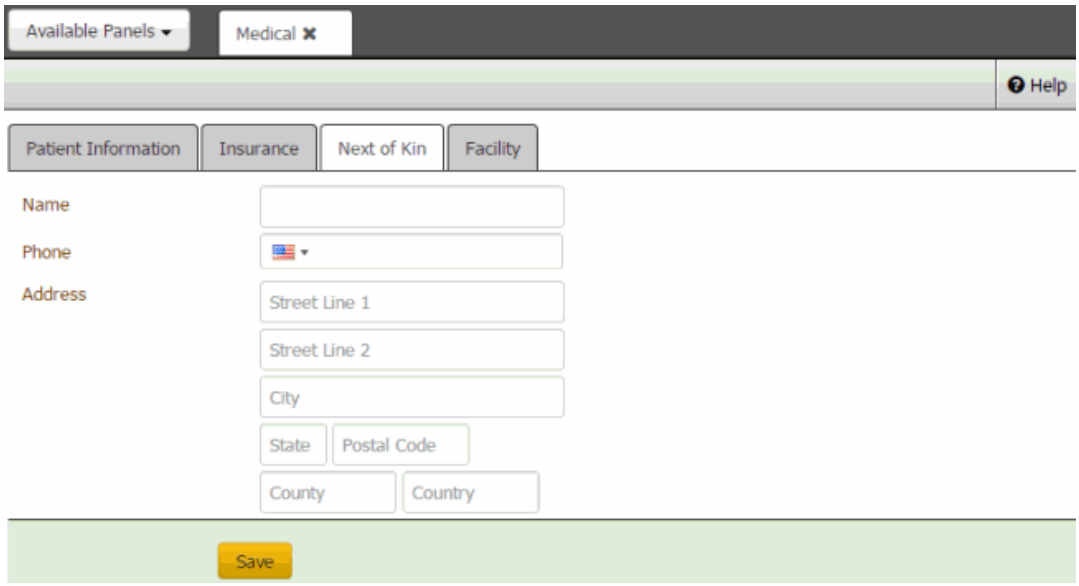
Medical

Add Next of Kin

Use the **Next of Kin** tab in the **Medical** panel to add next of kin information to the account.

To add next of kin

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Medical**.
2. Click the **Next of Kin** tab.



Name: Full name of the patient's next of kin.

Phone: Phone number of the patient's next of kin.

Address: Street address line 1, line 2, city, state, postal code, county, and country of the patient's next of kin.

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

Related Topics

Medical

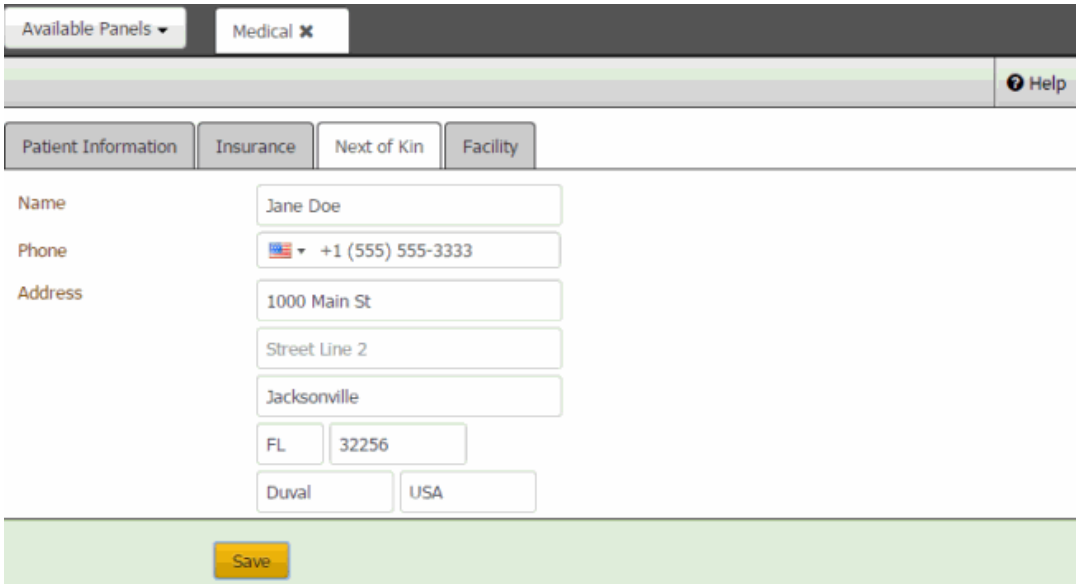
Feedback

Modify Next of Kin

Use the **Next of Kin** tab in the **Medical** panel to modify next of kin information for the account.

To modify next of kin

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Medical**.
2. Click the **Next of Kin** tab.



Name: Full name of the patient's next of kin.

Phone: Phone number of the patient's next of kin.

Address: Street address line 1, line 2, city, state, postal code, county, and country of the patient's next of kin.

3. Modify the information and then click **Save**.

Related Topics

Medical

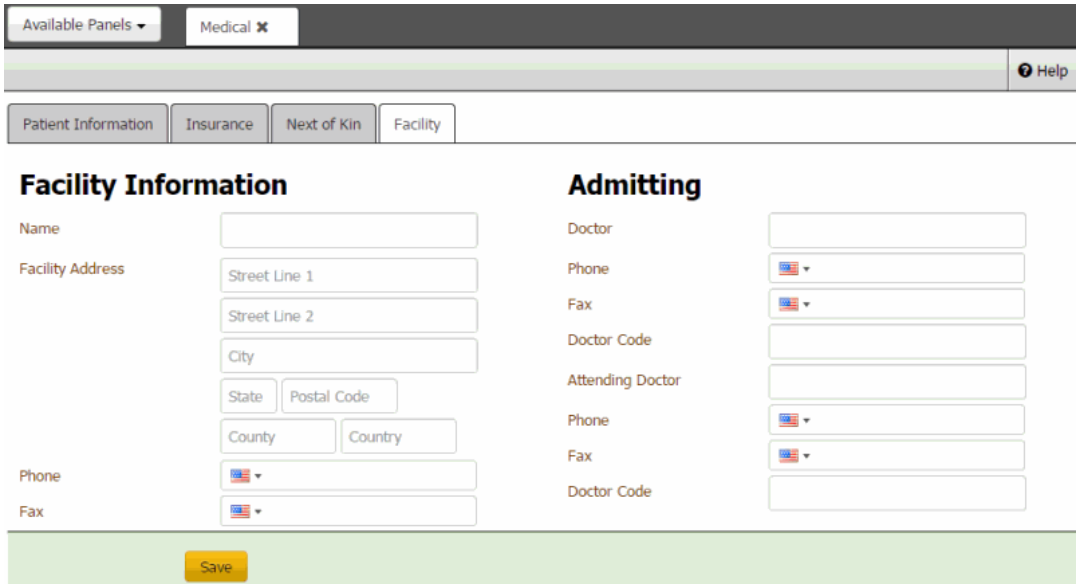
Feedback

Add a Medical Facility

Use the **Facility** tab in the **Medical** panel to add a medical facility to the account.

To add a medical facility information

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Medical**.
2. Click the **Facility** tab.



Name: Name of the medical facility.

Facility Address: Medical facility's street address line 1, line 2, city, state, postal code, county, and country.

Phone: Medical facility's phone number.

Fax: Medical facility's fax number.

Doctor: Name of the doctor who admitted the patient.

Phone: Admitting doctor's phone number.

Fax: Admitting doctor's fax number.

Doctor Code: Code that the medical facility assigned to identify the admitting doctor.

Attending Doctor: Name of the doctor who is rendering service to the patient.

Phone: Attending doctor's phone number.

Fax: Attending doctor's fax number.

Doctor Code: Code that the medical facility assigned to identify the attending doctor.

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

Related Topics

Medical

Feedback

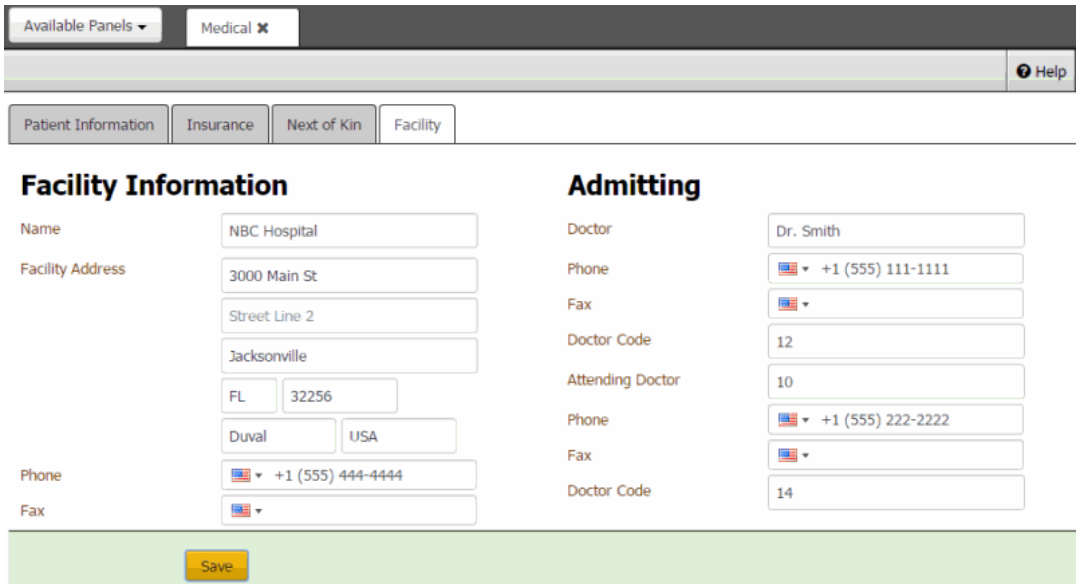
Modify a Medical Facility

Use the **Facility** tab in the **Medical** panel to modify a medical facility for the account.

To modify a medical facility information

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Medical**.

2. Click the **Facility** tab.



Name: Name of the medical facility.

Facility Address: Medical facility's street address line 1, line 2, city, state, postal code, county, and country.

Phone: Medical facility's phone number.

Fax: Medical facility's fax number.

Doctor: Name of the doctor who admitted the patient.

Phone: Admitting doctor's phone number.

Fax: Admitting doctor's fax number.

Doctor Code: Code that the medical facility assigned to identify the admitting doctor.

Attending Doctor: Name of the doctor who is rendering service to the patient.

Phone: Attending doctor's phone number.

Fax: Attending doctor's fax number.

Doctor Code: Code that the medical facility assigned to identify the attending doctor.

3. Modify the information and then click **Save**.

Related Topics

Medical

Miscellaneous Extra Data

Miscellaneous Extra Data

Use the **Misc Extra** panel to view, add, and modify miscellaneous data associated to the account. Miscellaneous extra data is any type of information related to the account that you cannot record elsewhere within the system. The ability to add or modify miscellaneous extra data is based on your permissions.

Related Topics

Add Miscellaneous Extra Data

Modify Miscellaneous Extra Data

Reference Panels Permission

Reference Panels

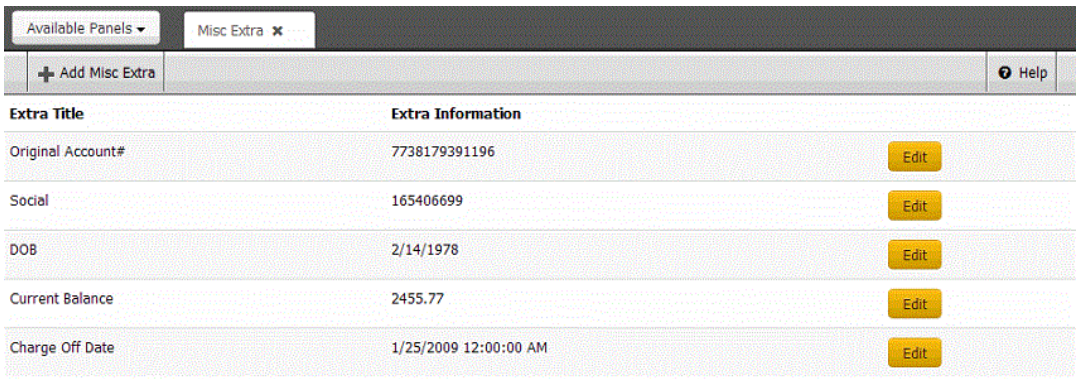
Feedback

Add Miscellaneous Extra Data

Use the **Add Misc Extra** dialog box to add miscellaneous extra data to the account. You can add miscellaneous information manually, or it can come from an import of customer data (including unmapped data). You must have the Create Misc Extra Data Permission.

To add miscellaneous extra data

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Misc Extra**.



2. In the **Misc Extra** toolbar, click **Add Misc Extra**.

Extra Title: Label that represents the extra data.

Extra Information: Extra data value.

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

Related Topics

Modify Miscellaneous Extra Data

Create Misc Extra Data Permission

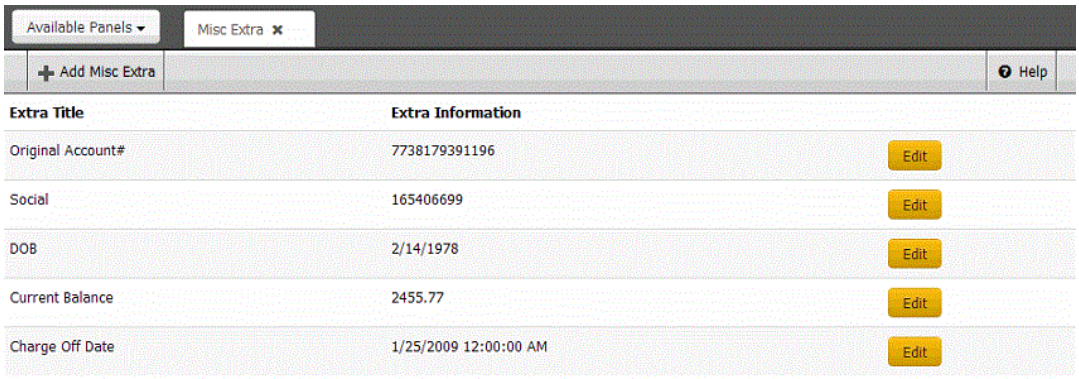
Feedback

Modify Miscellaneous Extra Data

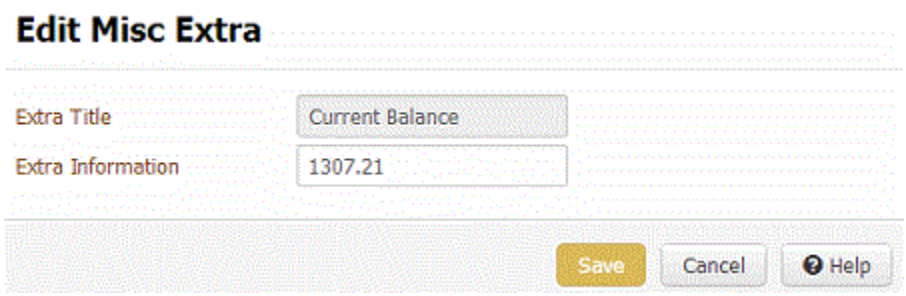
Use the **Edit Misc Extra** dialog box to modify miscellaneous extra data for the account. You must have the Update Misc Extra Data Permission.

To modify miscellaneous extra data

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Misc Extra**.



2. Click **Edit** for the extra data to modify.



Extra Title: Label that represents the extra data.

Extra Information: Extra data value.

3. Modify the information and then click **Save**.

Related Topics

Add Miscellaneous Extra Data

Update Misc Extra Data Permission

Notes

Feedback

Notes

Use the **Notes** panel to view notes and the **Add Note** dialog box to add notes to the account. The ability to view, add, or modify notes is based on your permissions.

Related Topics

View Account Notes

Add an Account Note

Redact an Account Note Comment

Action and Result Codes

Reference Panels Permission

Reference Panels

Data Grids

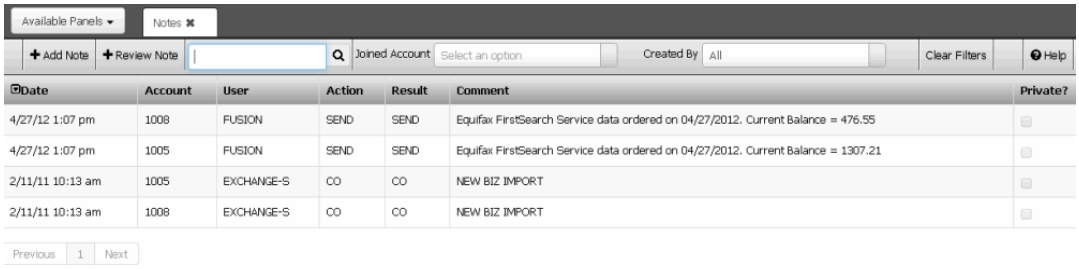
Feedback

View Account Notes

Use the **Notes** panel to view and filter notes for the account. You can filter notes by action code, result code, joined account, system-created, or user-created. You must have the View Private Notes Permission to view private notes.

To view account notes

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Notes**.



Joined Account: If selected, only displays notes for the specified joined account.

Created By: If selected, only displays notes for the specified user that created the note.

Clear Filters: Clears the specified filters and displays all notes.

Date: Date and time the system or a user created the note. Dates and times are based on your time zone.

Account: Number that the client assigned to identify the account.

User: User who created the note.

Action: Code that identifies the action taken on the account.

Result: Code that identifies the result of the action taken on the account.

Comment: Note detail.

Private: If selected, indicates that unauthorized users cannot view the note.

2. To display only the notes that meet specific criteria, in the **Search** box, type a word or phrase and then click the Search icon. Only notes that match the search criteria display in the data grid.

3. To display notes for a specific joined account only, in the **Joined Account** list box, click the joined account. Only notes for the specified joined account display in the data grid.

4. To display notes based on who created them, in the **Created by** list box, do the following:

    - To display only the notes that the system created, click **System**. Only notes that the system created display in the data grid.

    - To display only the notes that users created, click **Users**. Only notes that users created display in the data grid.

    - To display all notes, click **All**. Notes that the system or users created display in the data grid.

Tip: To clear the filters, click **Clear Filters**.

Related Topics

Data Grids

Action and Result Codes

Notes

View Private Notes Permission

Feedback

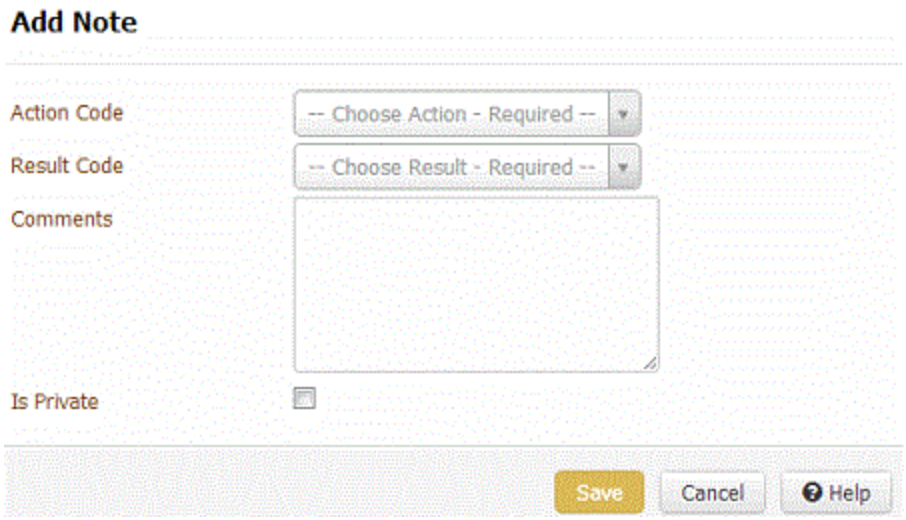
Add an Account Note

Use the **Add Note** dialog box to add an unlimited number of notes to the account. You must have the Create Notes Permission. To flag a note as private, you must have the Create Private Notes Permission and to view a note, you must have the View Private Notes Permission.

To add an account note

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Notes**.

2. In the **Notes** toolbar, click **Add Note**.



Action Code: Code that identifies the action taken on the account.

Result Code: Code that identifies the result of the action taken on the account. The system adds text to the **Comment** box for certain result codes.

Comments: Note detail. You can type an unlimited number of characters in this box.

Is Private: If selected, unauthorized personnel cannot view the note.

3. Complete the information and then click **Add Note**.

Related Topics

Action and Result Codes

Notes

Create Notes Permission

Create Private Notes Permission

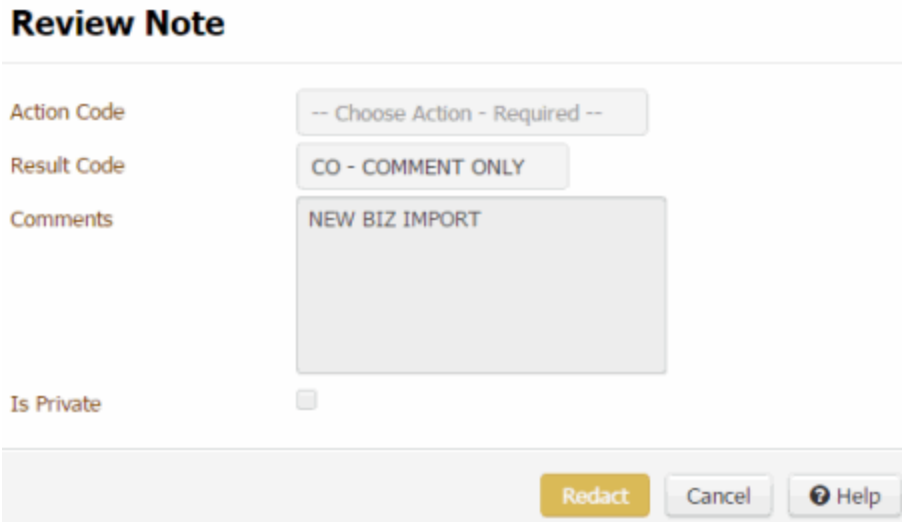
Feedback

Redact an Account Note Comment

Use the **Review Note** dialog box to redact (obscure) all or a portion of a note comment. You must have the Allow Redaction Permission.

To redact an account note comment

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Notes**.
2. In the data grid, click a note.
3. In the **Notes** toolbar, click **Review Note**.



4. In the **Comments** box, select the text to obscure and then click **Redact**.
5. In the confirmation dialog box, click **OK**. The system displays each character in the selected text as an "X". The original text remains untouched in the database.

Related Topics

Notes

Allow Redaction Permission

Feedback

Action and Result Codes

Action and result codes classify the work done on an account. The system and users attach notes to accounts. Action codes indicate the action on an account, while result codes indicate what happened as a result of the action. The system also uses result codes to count the number of accounts each collector works and contacts.

The following tables list the standard action and result codes.

Standard action codes

* Indicates system-utilized action codes.

Code	Description
3P	Third Party
AT	Attorney Telephoned
CO*	Comment Only
DT	Customer Telephoned Office
RL	Received Letter
SC	Supervisor Call
TA	Telephoned Attorney

TC*	Telephoned Client
TE*	Telephoned Employer
TI*	Telephoned Information
TR*	Telephoned Residence
TO	Telephoned Other

Standard result codes

* Indicates system-utilized action codes.

Code	Description	Worked	Contacted
AM*	Left message on Answering Machine	Yes	No
CO*	Comment Only	Yes	Yes
HU	Hung Up on	Yes	No
LB	Line Busy	Yes	Yes
LM	Left Message	Yes	Yes
LR	Left message on Recorder	No	No
LV	Left message on Voice Mail	No	No
NA*	No Answer	No	No
NH	No Help	Yes	Yes
NI	Not In	No	No
NL	No Listing	No	No
NP	Non-Published	No	No
TD	Temporarily Disconnected	No	No
TO	Telephoned Office	No	No
TT	Talked To	No	No
TW	Talked With (other than customer)	Yes	No
WN*	Wrong Number or no good	Yes	No

Related Topics

View Account Notes

Add an Account Note

Note Action Codes

Note Result Codes

Payment History

Payment History

Use the **Payment History** panel to view payment history and payment history details for the account.

Related Topics

View Payment History for an Account

View Payment History Detail for an Account

Reference Panels Permission

Reference Panels

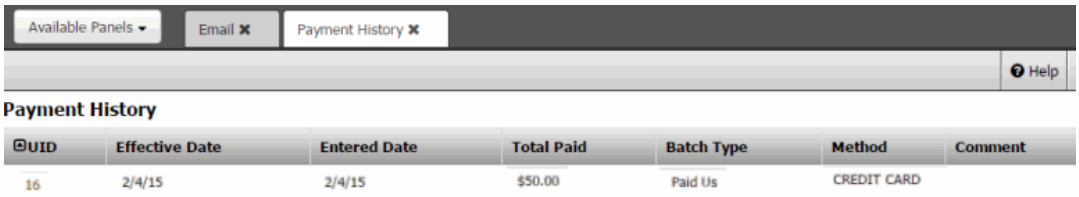
Feedback

View Payment History for an Account

Use the **Payment History** panel to view payment history for the account.

To view payment history for an account

- In the **Reference Panel** navigation bar, click **Available Panels** and then click **Payment History**.



UID: Code that identifies the payment transaction. Click the link in this column to view payment details.

Effective Date: Date and time the payment transaction occurred.

Entered Date: Date and time a user added the payment transaction to the system.

Total Paid: Payment amount.

Batch Type: Type of batch associated to the payment transaction.

Method: Payment method.

Comment: More information regarding the payment transaction.

Related Topics

Data Grids

View Payment History Detail for an Account

Payment Type Codes

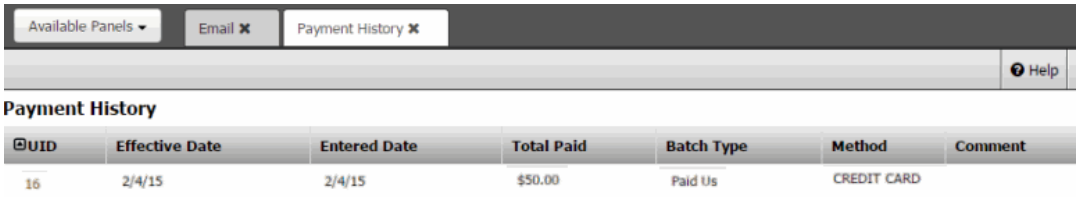
Feedback

View Payment History Detail for an Account

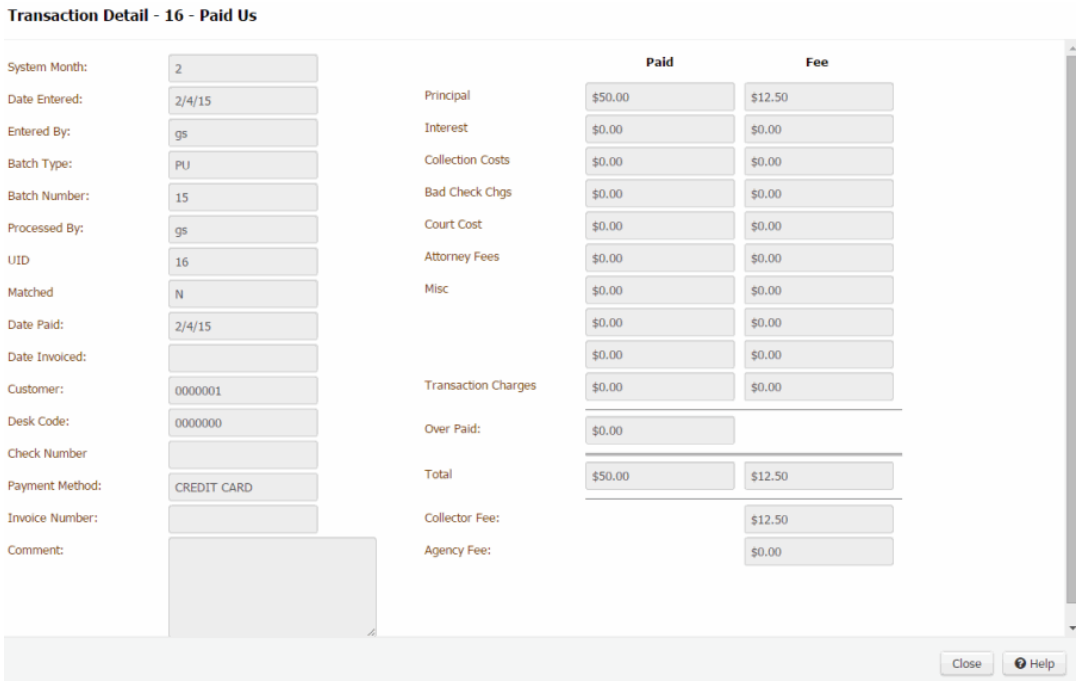
Use the **Transaction Detail** dialog box to view payment detail for the account.

To view payment history detail for an account

1. In the **Reference Panel** navigation bar, click **Available Panels** and then click **Payment History**.



2. In the UID column, click the link. The **Transaction Detail** dialog box appears.



System Month: Processing month associated to the payment.

Date Entered: Date a user added the payment arrangement to the system.

Entered By: User who added the payment arrangement to the system. If you set up an API key and create a payment using another program (such as Exchange Manager), the user associated to the API key displays here.

Batch Type: Type of batch associated to the payment, which is also the payment type. For more information, see Payment Type Codes.

Batch Number: Number that Latitude assigned to identify the payment batch.

Processed By: User who processed the payment batch. If you set up an API key and process a payment using another program (such as Exchange Manager), the user associated to the API key displays here.

UID: Code that identifies the payment transaction.

Matched: Indicates whether the system matched the payment to a reversal and, therefore, didn't include it on the invoice.

Date Paid: Payment date.

Date Invoiced: Date the system invoiced the customer.

Customer: Customer associated to the account.

Desk Code: Code that identifies the desk that added the payment.

>>>> ORIGINAL //liquid/latitude.2021r1_systest/products/documentation/source/Liquid_Latitude_Help/View_Payment_History_Detail_for_an_Account.htm#2

Inside **PaymentHistoryPanel**, new feature to change the desk of transaction is added.

when the button to change the desk is clicked it will open a popup with the available desk details. any of the desk can be selected to change the transaction desk.

Ordering and Filtering the desks is also present in the desk Popup.

There is a permission named "Change Payment Credit" available in administration section to give the option to change the transaction desk.

Once the desk is changed events will get created and gets added in the event panel.

On click of the three dots button, it will open a popup which will allow user to change desk.

This button is visible based on the permission “Change Payment Credit”

6. User can filter the desk codes based on the branch and select
7. Also has “All branches” in options which will display all desk codes
8. User can use search to search any desk code from the list
9. If user selects the same desk code then it will display below message:
10.
11. A

==== THEIRS //liquid/latitude.2021r1_systest/products/documentation/source/Liquid_Latitude_Help/View_Payment_History_Detail_for_an_Account.htm#3

Inside **PaymentHistoryPanel**, new feature to change the desk of transaction is added.

when the button to change the desk is clicked it will open a popup with the available desk details. any of the desk can be selected to change the transaction desk.

Ordering and Filtering the desks is also present in the desk Popup.

There is a new permission added named "Change Payment Credit" available in administration section to give the option to change the transaction desk.

Once the desk is changed events will get created and gets added in the event panel.

On click of the three dots button, it will open a popup which will allow user to change desk.

If “Change Payment Credit” permission is enabled then button is visible.

12. User can filter the desk by selecting a branch from the drop down.
13. Also has “All branches” in options which will display all desk codes
14. User can use search options to search any desk code from the list
15. If >>>> ORIGINAL //liquid/latitude.2020r1_systest/products/documentation/source/Liquid_Latitude_Help/View_Payment_History_Detail_for_an_Account.htm#2 user selects the same desk code then it will display below message:

>>>> ORIGINAL //liquid/latitude.2020r2_systest/products/documentation/source/Liquid_Latitude_Help/View_Payment_History_Detail_for_an_Account.htm#3 a user tries to change the desks by selecting the existing desks code then the below error message displays
==== THEIRS //liquid/latitude.2020r2_systest/products/documentation/source/Liquid_Latitude_Help/View_Payment_History_Detail_for_an_Account.htm#4 ==== THEIRS //liquid/latitude.2020r1_systest/products/documentation/source/Liquid_Latitude_Help/View_Payment_History_Detail_for_an_Account.htm#3 user selects the same desk code then it will display below message appears:
==== YOURS //dshettyv_liquid_latitude.2020r2_systest/products/documentation/source/Liquid_Latitude_Help/View_Payment_History_Detail_for_an_Account.htm a user tries to change the desks by selecting the existing desks code then the below error message displays
<<<< ==== YOURS //dshettyv_liquid_latitude.2021r1_systest/products/documentation/source/Liquid_Latitude_Help/View_Payment_History_Detail_for_an_Account.htm <<<<

16.

17. A

==== YOURS //dshettyv_liquid_latitude.2022r1_systest/products/documentation/source/Liquid_Latitude_Help/View_Payment_History_Detail_for_an_Account.htm <<<<

Check Number: Check number associated to the payment.

Payment Method: Form of payment (for example, cash, check, credit card).

Invoice Number: Invoice number for the payment.

Comment: More information regarding the payment.

Money Buckets: Money buckets associated to the payment.

Paid: Amount of the payment assigned to the money bucket.

Fee: Collection fee associated to the money bucket amount.

Overpaid: Overpayment amount (amount paid less the account balance).

Total: Totals for payment and fee amounts.

Collector Fee: Total collector fees (sum of the fees for all the money buckets).

Agency Fee: Total agency fees.

3. When finished viewing the information, click **Close**.

Related Topics

Data Grids

View Payment History for an Account

Payment Type Codes

Phones

Phones

Use the **Phones** panel to view phone numbers for parties on the account and use the **Add Phone Number** dialog box to add phone numbers.

Related Topics

View Phone Numbers for an Account

Add a Phone Number to an Account

Modify a Phone Number on an Account

Change the Status of an Account Phone Number

Dial a Phone Number

Add a Phone Contact Result

Phone Number Status Icons

Reference Panels Permission

Reference Panels

Data Grids

View Phone Numbers for an Account

Use the **Phones** panel to view phone numbers for parties on the account.

To view phone numbers for an account

- In the **Reference Panel** navigation bar, click **Available Panels** and then click **Phones**.

Number: Person's phone number. If a call is on hold, a Hold icon and a message appear next to the phone number.

Type: Type of phone number.

Consent: Indicates whether the customer granted permission to call or send a text message to the phone number. For more information, see Phone Usage Consent Icons.

Status: Status of the phone number. For more information, see Phone Number Status Icons.

Customer: Customer on the account.

Attempts: Number of times you attempted to call or text the phone number.

Last Attempt: Date and time you last attempted to call or text the phone number.

Name: Name of the person associated to the phone number.

On Hold: If the phone number is on hold, the hold icon appears.

Hold Expiration Date: Date the hold expires. If the phone number is on hold and there isn't an expiration date, the hold remains until a user or a process removes the hold.

Related Topics

Data Grids

Phone Number Status Icons

Contact Information

Phones

Feedback

Add a Phone Number to an Account

Use the **Add Phone Number** dialog box to add a party's phone number to the account. To add a phone number, you must have the Create Phone Numbers Permission.

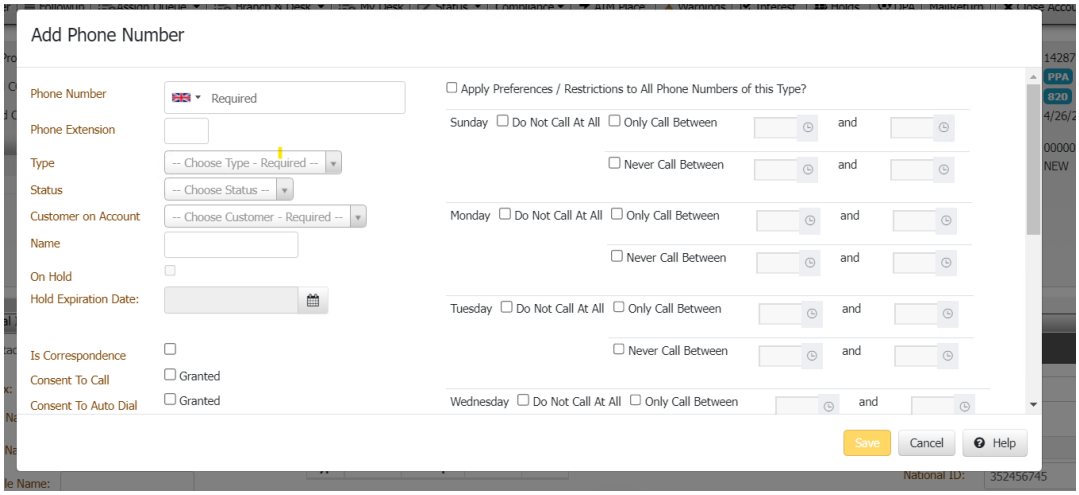
To add a phone number to an account

1. Do one of the following:

   - In the **Task Panel** navigation tree, click **Customer** and then click a name. In the **Contact Information** tab, click **Add Phone**.

   - In the **Reference Panel** navigation bar, click **Available Panels** and then click **Phones**. In the **Phones** toolbar, click **Add Phone**.

   The **Add Phone Number** dialog box appears.



Phone Number: Person's phone number, including the country code. You can select the country from the list box or type a plus sign (+) and then the country code (for example, "+44" for United Kingdom).

Phone Extension: Phone extension.

Type: Type of phone number.

Status: Status of the phone number.

Customer on Account: Customer on the account.

Name: Name of the person associated to the phone number.

On Hold: If selected, the phone number is on hold.

Hold Expiration Date: Date the hold expires. If you don't specify a date, the hold remains until you clear the **On Hold** check box or remove the hold using another process.

Consent To Call: If selected, the person granted permission to call this phone number.

Consent To Auto Dial: If selected, the person granted permission to call this phone number using a dialer campaign.

Consent To SMS: If selected, the person granted permission to send a text message to this phone number.

Consent to fax: If selected, the person granted permission to send a fax to this phone number.

Obtained From: Person who granted or denied permission to contact this phone number.

Method: Indicates whether the person granted permission verbally or in writing.

Comment: More information regarding the phone number.

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

3. **Context Menu:**If selected, the person can set the restrictions or preferences for the future date and time, to send SMS.

Related Topics

Contact Information

Phones

Create Phone Numbers Permission

Feedback

Modify a Phone Number on an Account

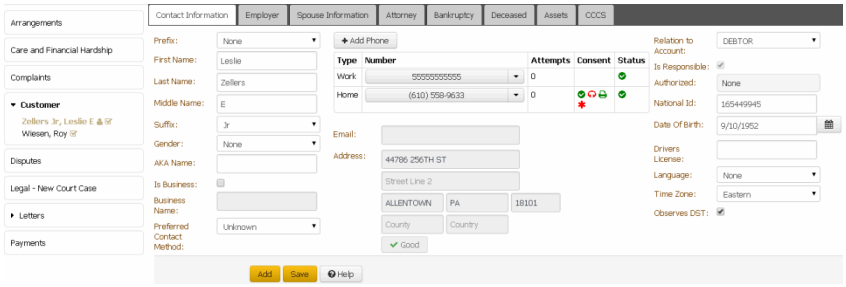
Use the **Edit Phone Number** dialog box to modify phone information for a party on the account. To modify phone numbers, you must have the Update Phone Numbers Permission. To modify phone consent options, you must have the Change Phone Consent Permission. The system records phone number changes in the **Notes** panel.

Note: If the system administrator configured the Mask Phone Numbers Permission, the system replaces all or parts of the phone number with asterisks (*), depending on the configuration.

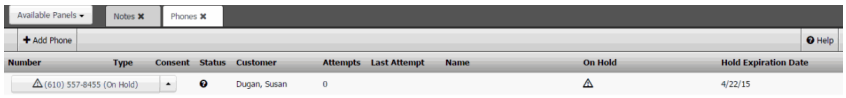
To modify a phone number on an account

1. Do one of the following:

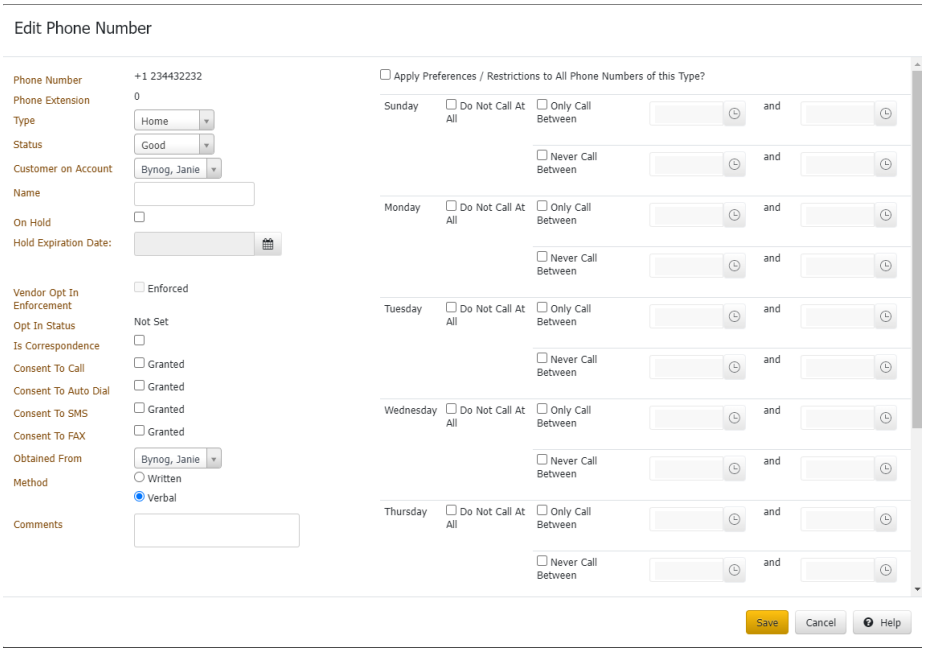
   - In the **Task Panel** navigation tree, click **Customer** and then click a name. The **Contact Information** tab appears.



   - In the **Reference Panel** navigation bar, click **Available Panels** and then click **Phones**. The **Phones** panel appears.



2. Click the arrow next to the phone number and then click **Edit**.



Phone Number: Person's phone number, including the country code. You can select the country from the list box or type a plus sign (+) and then the country code (for example, "+44" for United Kingdom). You cannot modify the phone number.

Phone Extension: Phone extension. You cannot modify the phone extension.

Type: Type of phone number. To modify the phone type, you must have the Update Phone Type Permission.

Status: Status of the phone number. To modify the phone status, you must have the Update Phone Status Permission.

Customer on Account: Customer on the account.

Name: Name of the person associated to the phone number.

On Hold: If selected, the phone number is on hold.

Hold Expiration Date: Date the hold expires. If you don't specify a date, the hold remains until you clear the **On Hold** check box or remove the hold using another process.

Vendor Opt In Enforcement: Vendor Opt In Enforcement indicates if the SMS vendor enforces Opt In.

Opt In Status: Opt-In Status is the current Opt-In Status on the SMS vendor side

Consent To Call: If selected, the person granted permission to call this phone number.

Consent To Auto Dial: If selected, the person granted permission to call this phone number using a dialer campaign.

Consent To SMS: If selected, the person granted permission to send a text message to this phone number.

Consent to fax: If selected, the person granted permission to send a fax to this phone number.

Obtained From: Person who granted or denied permission to contact this phone number.

Method: Indicates whether the person granted permission verbally or in writing.

Comment: More information regarding the phone number.

Apply Preferences/Restrictions to all Phone Numbers of this Type?: If selected, preferred day and time to call, can be captured for this phone type.

3. Modify the information and then click **Save**.

Related Topics

Contact Information

Phones

Update Phone Numbers Permission

Update Phone Status Permission

Update Phone Type Permission

View Preferred Time To Call Details

Feedback

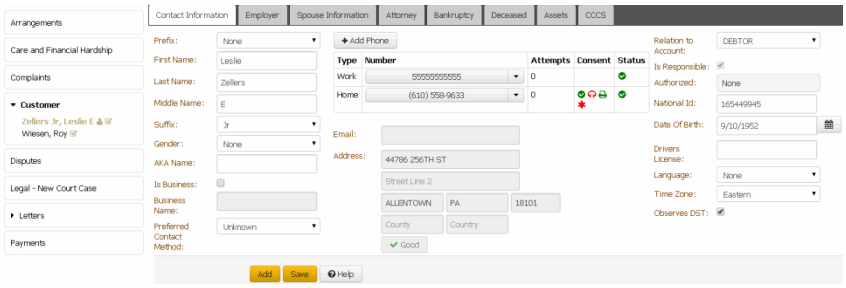
Change the Status of an Account Phone Number

Use the **Contact Information** tab or the **Phones** panel to change the status of a phone number on the account. You must have the Update Phone Status Permission.

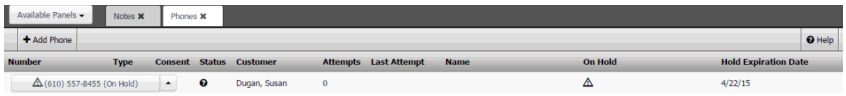
To change the status of an account phone number

1. Do one of the following:

   - In the **Task Panel** navigation tree, click **Customer** and then click a name. The **Contact Information** tab appears.



   - In the **Reference Panel** navigation bar, click **Available Panels** and then click **Phones**. The **Phones** panel appears.



2. Click the arrow next to the phone number and then click the status (**Good** or **Bad**).

Related Topics

Data Grids

Contact Information

Phones

Update Phone Status Permission

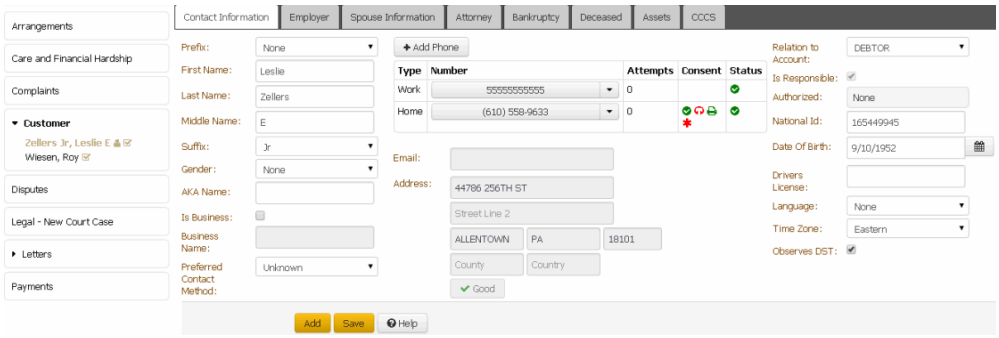
Dial a Phone Number

Use the **Contact Information** tab or the **Phones** panel to dial a phone number on the account. You can dial a phone number directly under the following conditions:

- Dialer is present.
- User is not on a call currently through manual or campaign dialing.
- **Consent To Call** option is selected, indicating that the person granted permission to call the phone number.
- Phone status is "Good."

To dial a phone number

1. Do one of the following:
    - In the **Task Panel** navigation tree, click **Customer** and then click a name. The **Contact Information** tab appears.



    - In the **Reference Panel** navigation bar, click **Available Panels** and then click **Phones**. The **Phones** panel appears.

2. Click the arrow next to the phone number and then click **Dial Number**. If the conditions for dialing a phone number are met, Latitude places the call.

Related Topics

Data Grids

Contact Information

Phones

Update Phone Status Permission

Feedback

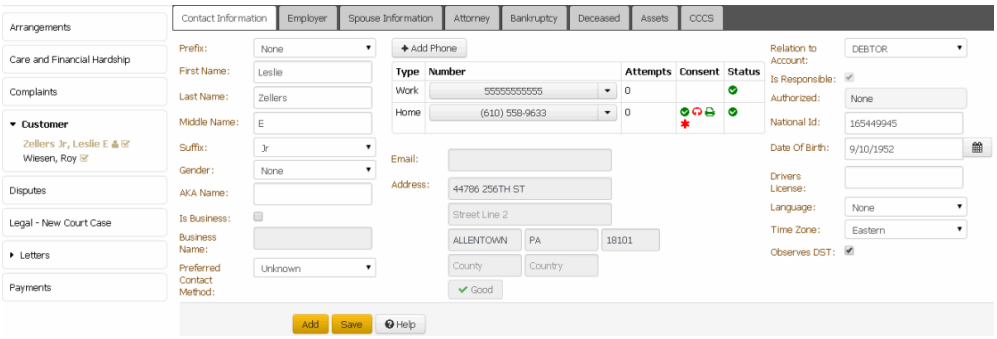
Add a Phone Contact Result

Use the **Contact Information** tab or the **Phones** panel to add the result of contacting a party on the account. The system records these changes in the **Notes** panel.

To add a phone contact result

1. Do one of the following:

   - In the **Task Panel** navigation tree, click **Customer** and then click a name. The **Contact Information** tab appears.



   - In the **Reference Panel** navigation bar, click **Available Panels** and then click **Phones**. The **Phones** panel appears.

2. Click the arrow next to the phone number and then click the contact result. For example, No Answer, Line Busy, Bad Number, Left Message Person, and Left Message Machine.

Related Topics

Data Grids

Contact Information

Phones

Feedback

Phone Number Status Icons

The status indicates the state of an account phone number. The following table lists the phone number status icons and their description.

Icon	Description
	The status of the phone number is unknown.
	The phone number is bad.
	The phone number is good.
	The phone number is on hold.

Related Topics

Maintain Contact Information

View Phone Numbers for an Account

Feedback

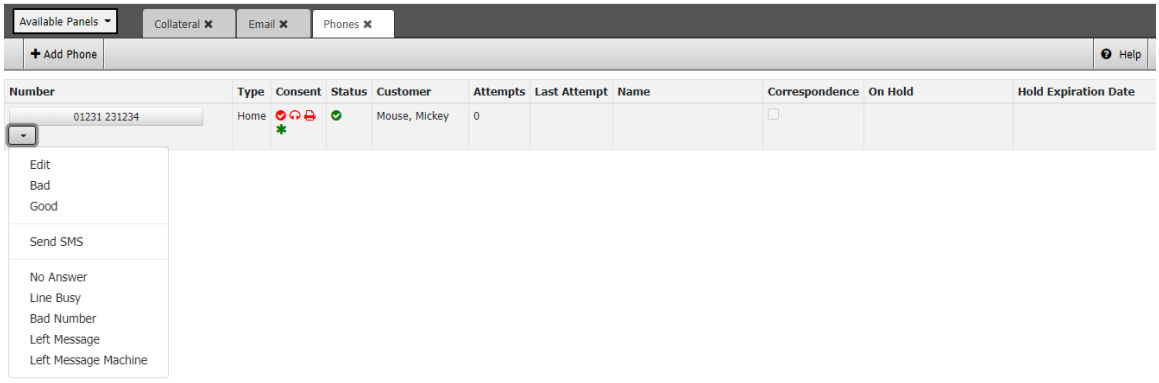
Send SMS to an Account

Use to send an SMS from the selected phone record.

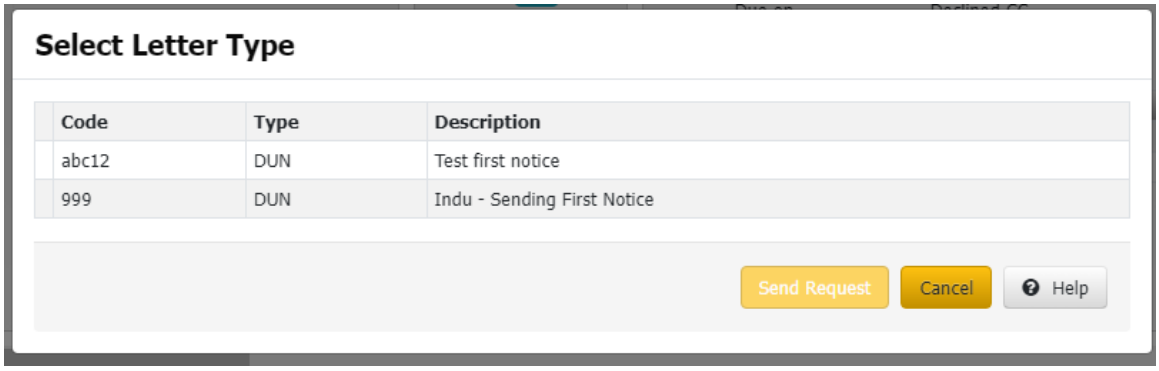
To send an SMS:

Do the following:

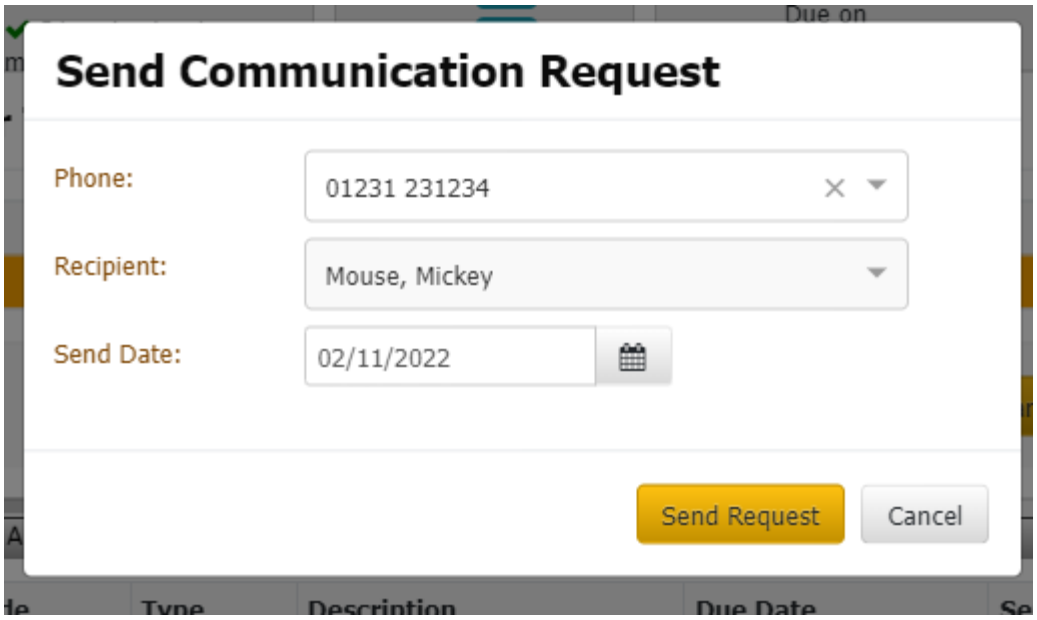
- In the **Reference Panel** navigation bar, click **Available Panels** and then **Phones**, click arrow then select **SMS.**



- The list of Letter types will show, select any one and then click **Send request.**

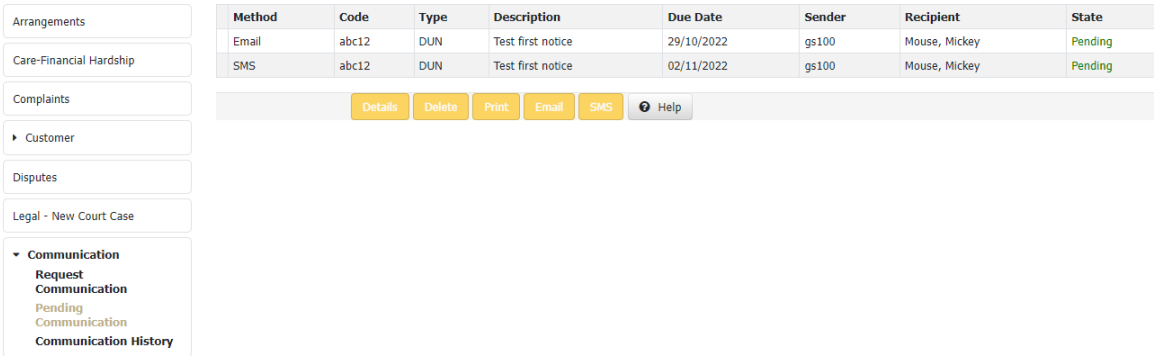


- While sending **Communication Request** select Date, it can be **Current Date/Future Date**, then click **Send Request.**



18. Choosing the Future Date, the Communication request shows in the **Pending Communication Panels.**

19.



Account Analysis

Feedback

Account Analysis

You can use the **Account Analysis** tool to create queries to retrieve accounts that meet specific criteria. You can sort, group, and summarize the information for review.

For more information about each account analysis condition, see the Account Analysis Conditions Technical Reference.

Note: You cannot use portfolio conditions to query accounts in Latitude as portfolios and groups related to portfolios (for example, buyers, sellers, and investors) aren't at the account level. You can only use portfolio conditions to search for portfolios and groups in Portfolio Manager.

To open the Account Analysis page

On the **Welcome** page, click **Account Analysis**. The **Account Analysis** page appears.

1. **Tabs:** Displays the tabs for designing a query and viewing the results of running a query.
2. **Toolbar:** Provides options for clearing, opening, saving, and running selection criteria, and counting the query results.

Option	Description
Clear	Clears all query settings currently displayed in the window.
Open	Clears the query settings currently displayed in the window and opens a saved query.
Save	Saves the query settings currently displayed in the window.
Count	Sums the number of records that match the selection criteria.
Run	Runs the query and displays the results on the **Results** tab.

3. **Data Selection tree:** Provides a list of data you can select to create a query.
4. **Select Columns pane:** Allows you to select and arrange the columns of data to display in the query results.
5. **Conditions pane:** Allows you to set the conditions for retrieving data.
6. **Order pane:** Allows you to set the order for displaying or running data.

Related Topics

Create an Account Analysis Query

Modify an Account Analysis Query

Run an Account Analysis Query

Query Columns

Query Conditions

Query Results

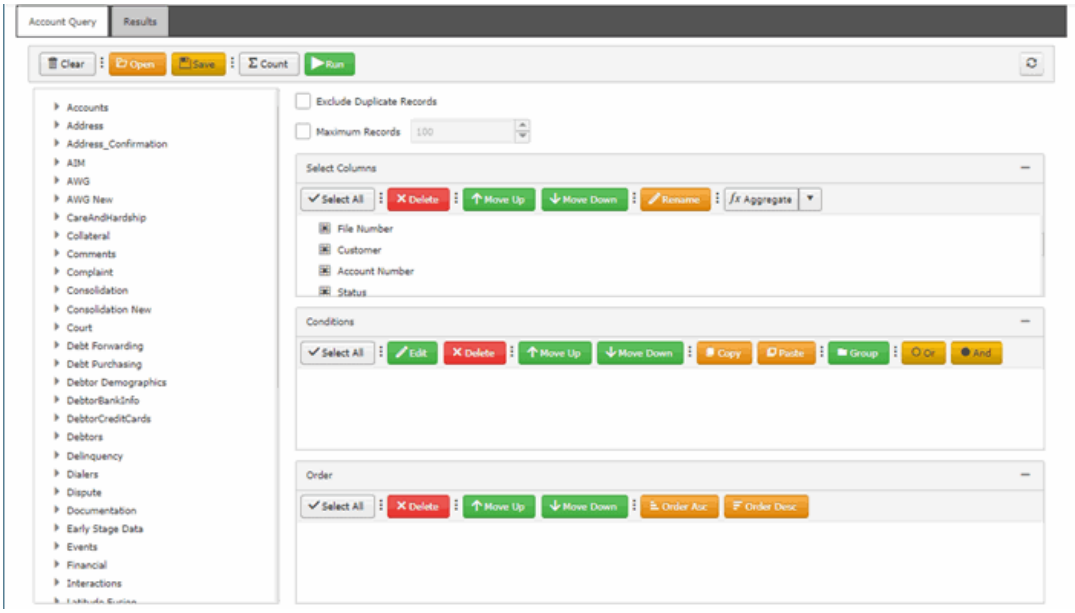
Feedback

Create an Account Analysis Query

Use the **Account Analysis** page to query accounts based on specific criteria and analyze the results.

To create an account analysis query

1. On the **Welcome** page, click **Account Analysis**. The **Account Analysis** page appears.



2. To exclude duplicate records from the query results, select **Exclude Duplicate Records**.

3. To limit the query results to a specific number of records, select **Maximum Records** and then, in the box, type the maximum number of records to include in the results.

4. In the **Select Columns** pane, specify which data items to display as columns in the query results. For more information about working with columns, see Query Columns.

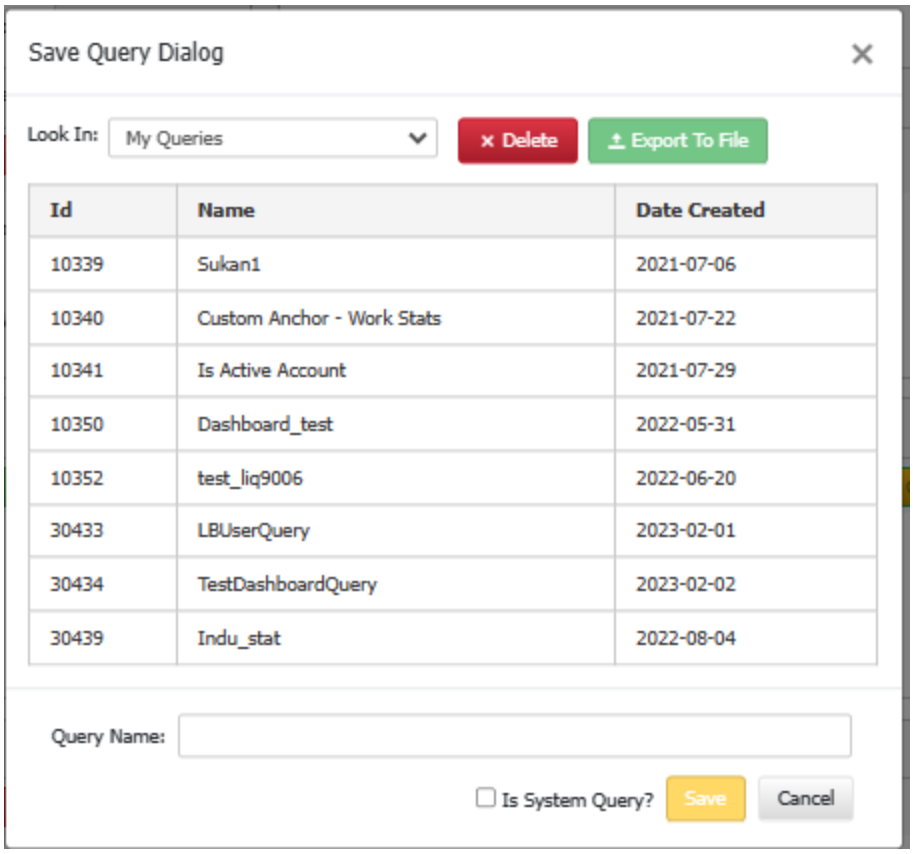
5. In the **Conditions** pane, specify one or more conditions. For more information about working with conditions, see Query Conditions.

6. In the **Order** pane, specify the sort order for the query results. For more information about the query results sort order, see Specify the Query Results Sort Order.

7. To count the number of records that match the selection criteria, in the toolbar, click **Count**. The results appear in the **Query Designer** dialog box. Click **OK**.

8. To save the query, do the following:

a. In the toolbar, click **Save**. The **Save Query Dialog** box appears.



b. In the **Query Name** box, type a name for the query and then click **Save**.

c. "To create a system level query, select **Is System Query?** check box .System Queries can be used in Custom Panels, Communication Templates and Script Builder queries. This option will only be available if the permission "**Create System Level Queries**" is enabled for the user."

9. To export the query in the **Save Query Dialog** box, click **Export To File**. Query file is downloaded.

10. To delete a saved query in the **Save Query Dialog** box, click **Delete** to delete a saved query.

Related Topics

Query Columns

Query Conditions

Query Results

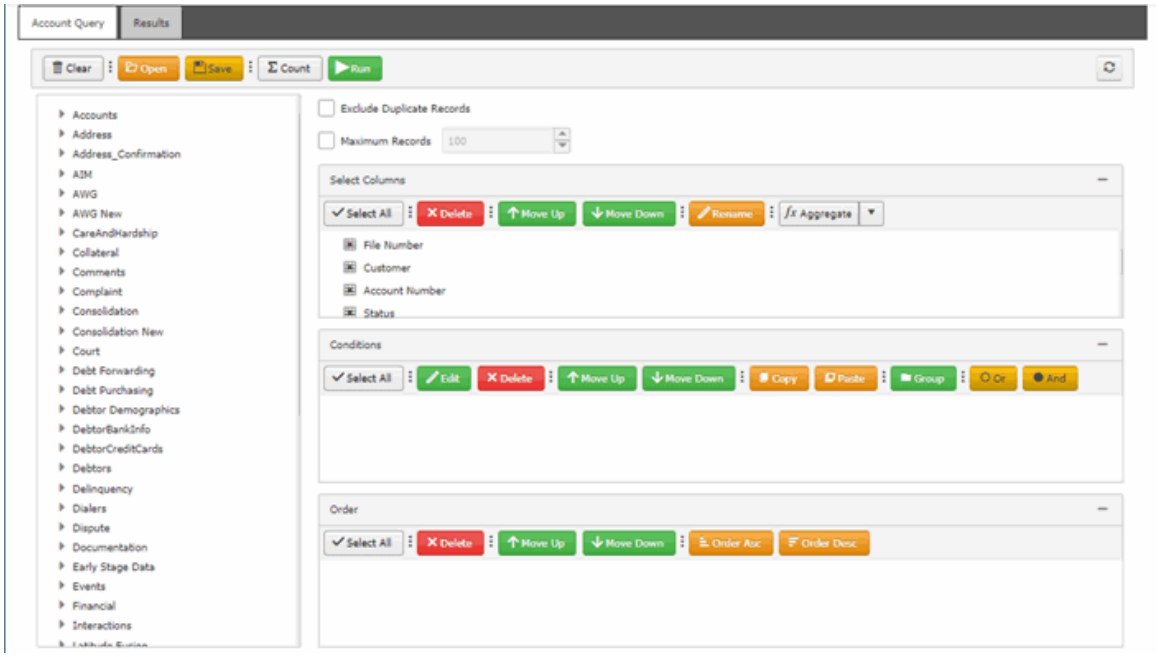
Account Analysis

Create a System level Queries

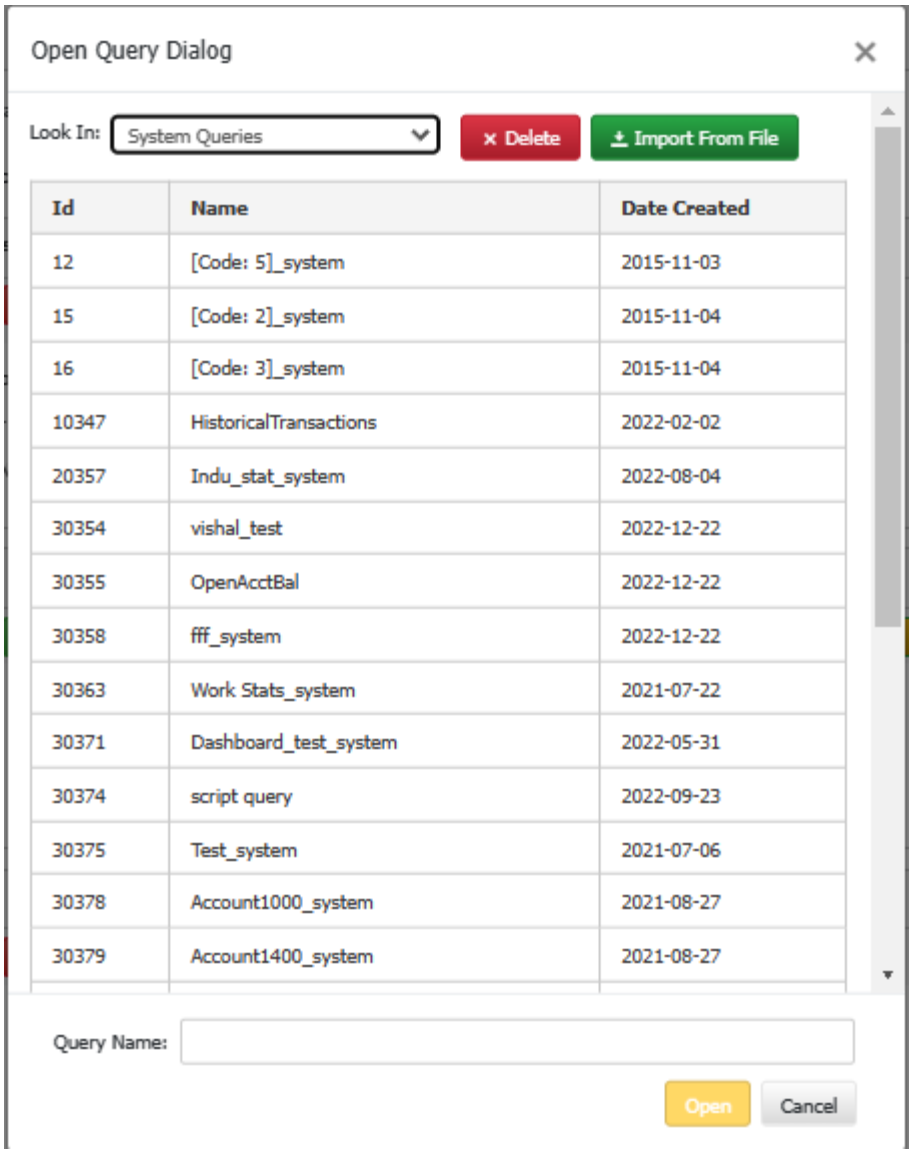
Use the **System level Queries** which enables the users to **create/modify/delete** a system query using the **Account Analysis.**

To create System level Queries

1. **O**n the **Welcome** page, click **Account Analysis**. The **Account Analysis** page appears.

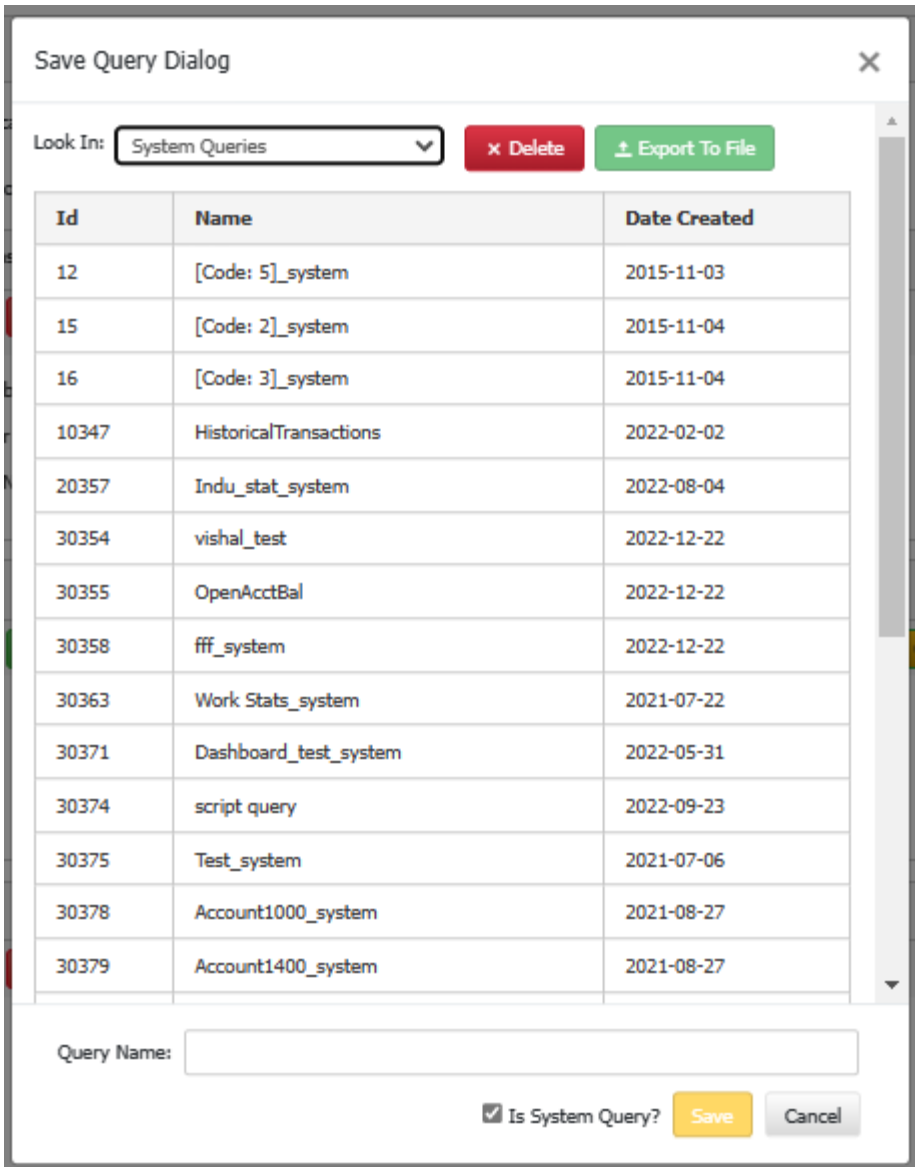


2. In the toolbar, click **Open**. The **Open Query Dialog** box appears.



3. In the **Name** column, click the query and then click **Open**. The query appears on the **Account Analysis** page.
4. Modify the query.
5. To save the query, do the following:

a. In the toolbar, click **Save**. The **Save Query Dialog** box appears.



b. Click **Save**.

Tip:

- To save the query with a different name, in the **Query Name** box, type a new name for the query and then click **Save**. The original query remains unchanged and the system creates a query.

- "To create a system level query, select **Is System Query?** check box .System Queries can be used in Custom Panels, Communication Templates and Script Builder queries. This option will only be available if the permission "**Create System Level Queries**" is enabled for the user."

6. To export the query in the **Save Query Dialog** box, click **Export To File**. Query file is downloaded.

7. To delete a saved query in the **Save Query Dialog** box, click **Delete** to delete a saved query.

Related Topics

Query Columns

Query Conditions

Query Results

Account Analysis

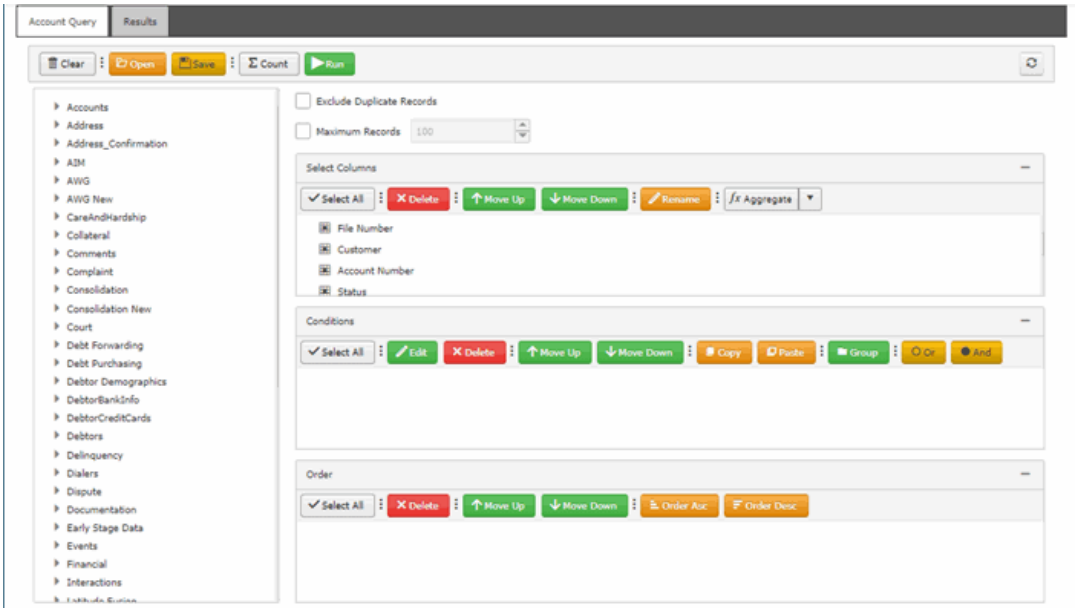
Feedback

Modify an Account Analysis Query

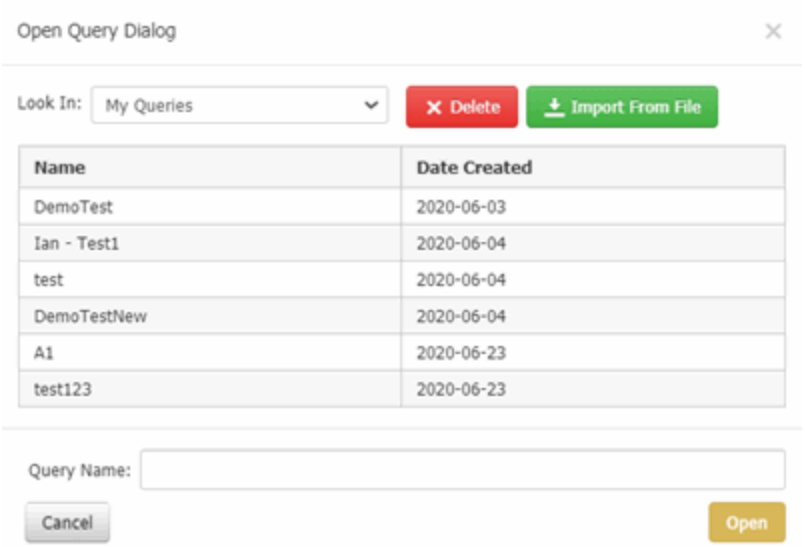
Use the **Account Analysis** page to modify a query for analyzing accounts.

To modify an account analysis query

1. On the **Welcome** page, click **Account Analysis**. The **Account Analysis** page appears.

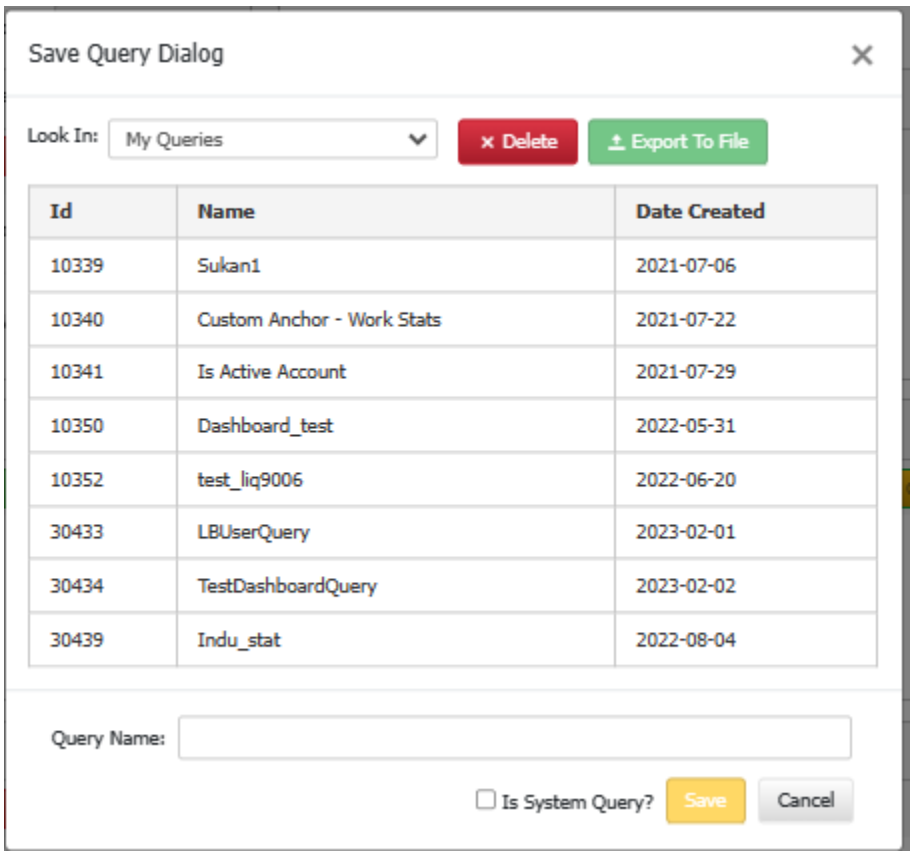


2. In the toolbar, click **Open**. The **Open Query Dialog** box appears.



3. In the **Name** column, click the query and then click **Open**. The query appears on the **Account Analysis** page.
4. Modify the query.
5. To save the query, do the following:

a. In the toolbar, click **Save**. The **Save Query Dialog** box appears.



b. Click **Save**.

Tip:

- To save the query with a different name, in the **Query Name** box, type a new name for the query and then click **Save**. The original query remains unchanged and the system creates a query.

- "To create a system level query, select **Is System Query?** check box .System Queries can be used in Custom Panels, Communication Templates and Script Builder queries. This option will only be available if the permission "**Create System Level Queries**" is enabled for the user."

6. To export the query in the **Save Query Dialog** box, click **Export To File**. Query file is downloaded.

7. To delete a saved query in the **Save Query Dialog** box, click **Delete** to delete a saved query.

Related Topics

Query Columns

Query Conditions

Query Results

Account Analysis

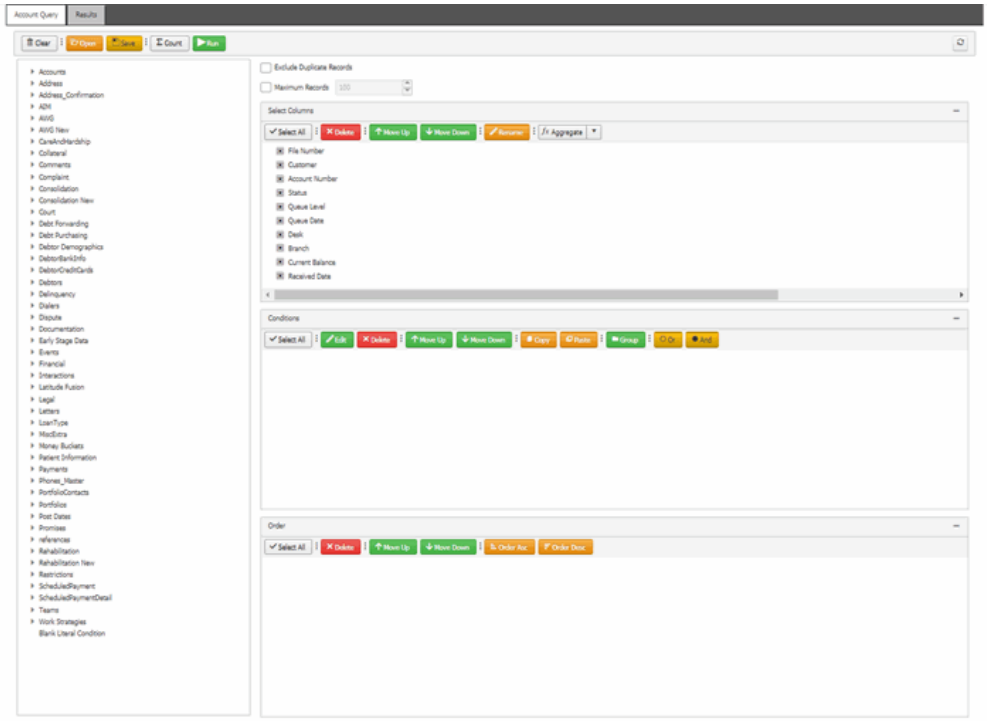
Feedback

Run an Account Analysis Query

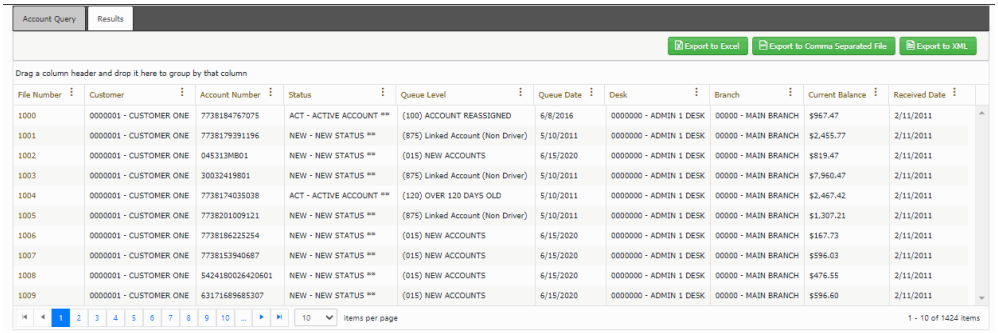
Use the **Account Analysis** page to run an account analysis query.

To run an account analysis query

1. Ensure that a query is open on the **Account Analysis** page.



2. In the toolbar, click **Run**. The results appear on the **Results** tab.



File Number	Customer	Account Number	Status	Queue Level	Queue Date	Desk	Branch	Current Balance	Received Date
1000	0000001 - CUSTOMER ONE	7738184767075	ACT - ACTIVE ACCOUNT **	(100) ACCOUNT REASSIGNED	6/8/2016	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$967.47	2/11/2011
1001	0000001 - CUSTOMER ONE	7738179391196	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$2,455.77	2/11/2011
1002	0000001 - CUSTOMER ONE	045313MB01	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/15/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$819.47	2/11/2011
1003	0000001 - CUSTOMER ONE	30032419801	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$7,960.47	2/11/2011
1004	0000001 - CUSTOMER ONE	7738174035038	ACT - ACTIVE ACCOUNT **	(120) OVER 120 DAYS OLD	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$2,467.42	2/11/2011
1005	0000001 - CUSTOMER ONE	7738201009121	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$1,307.21	2/11/2011
1006	0000001 - CUSTOMER ONE	7738186225254	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/15/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$167.73	2/11/2011
1007	0000001 - CUSTOMER ONE	7738153940687	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/15/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$596.03	2/11/2011
1008	0000001 - CUSTOMER ONE	5424180026420601	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/15/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$476.55	2/11/2011
1009	0000001 - CUSTOMER ONE	63171689685307	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/15/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$596.60	2/11/2011

3. To export the results to a file, see Export Query Results.

4. For more information about working with query results, see Query Results.

Related Topics
Query Results

Account Analysis

Query Columns

Query Columns

Use the **Select Columns** pane on the **Account Analysis** page to specify the data columns to include in the query result set. A default set of columns appears in the **Select Columns** pane when you first open the page.

Related Topics

Add a Query Column

Delete a Query Column

Modify the Query Column Order

Modify the Query Column Name

Assign an Aggregate Function to a Column

Aggregate Functions

Account Analysis

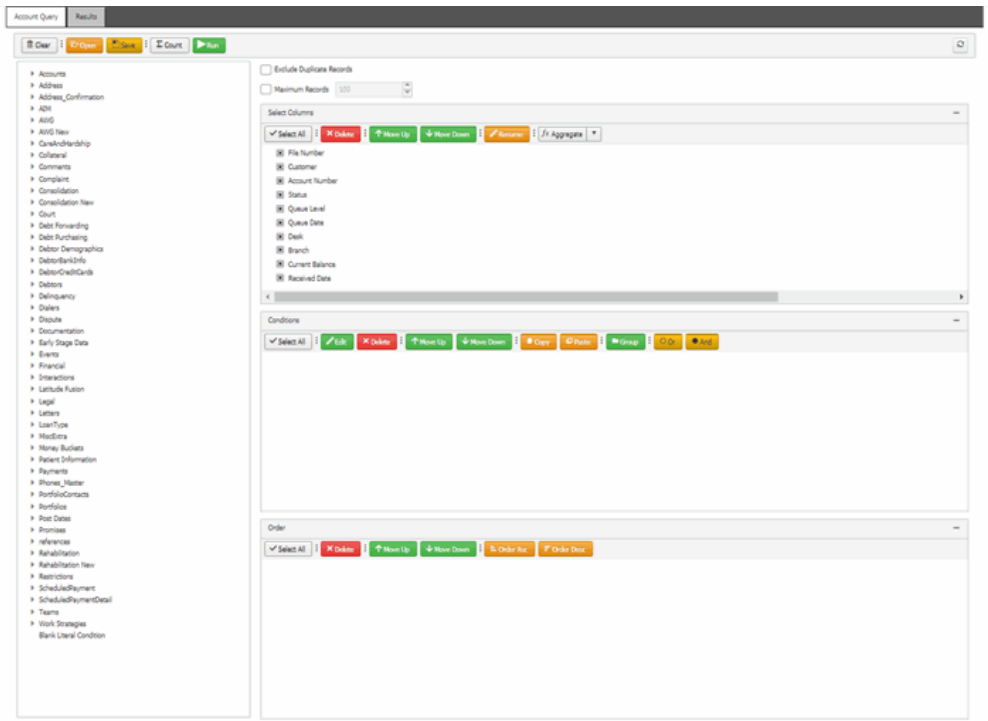
Feedback

Add a Query Column

Use the **Select Columns** pane on the **Account Analysis** page to specify the data items to include as columns in the query results.

To add a query column

1. Ensure that a query is open on the **Account Analysis** page.



2. In the **Data Selection** tree, expand nodes to locate the data item to include as a column.

3. Drag and drop the data item into the **Select Columns** pane.
4. Continue adding columns as necessary.

Related Topics

Query Columns

Create an Account Analysis Query

Modify an Account Analysis Query

Account Analysis

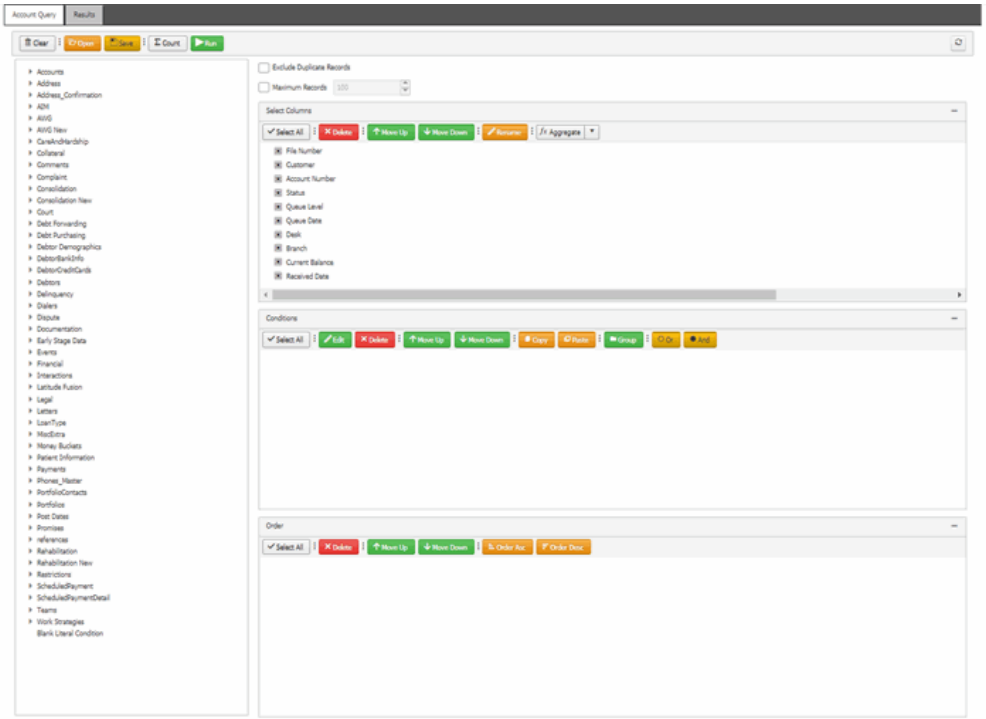
Feedback

Delete a Query Column

Use the **Select Columns** pane on the **Account Analysis** page to exclude a column from the query results.

To delete a query column

1. Ensure that a query is open on the **Account Analysis** page.



2. In the **Select Columns** pane, click the column name and then click **Delete**.

Related Topics

Query Columns

Create an Account Analysis Query

Modify an Account Analysis Query

Account Analysis

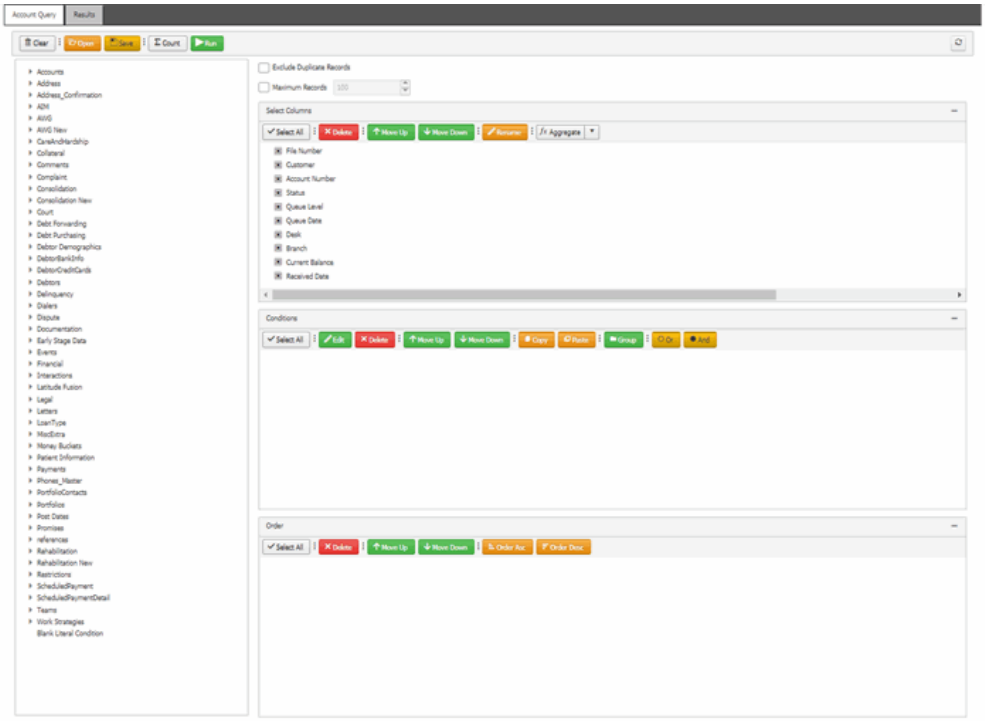
Feedback

Modify the Query Column Order

Use the **Select Columns** pane on the **Account Analysis** page to change the order in which columns of data appear in the query results.

To modify the order of a query column

1. Ensure that a query is open on the **Account Analysis** page.



2. In the **Select Columns** pane, click a column name and then click **Move Up** or **Move Down**.

Related Topics

Query Columns

Create an Account Analysis Query

Modify an Account Analysis Query

Account Analysis

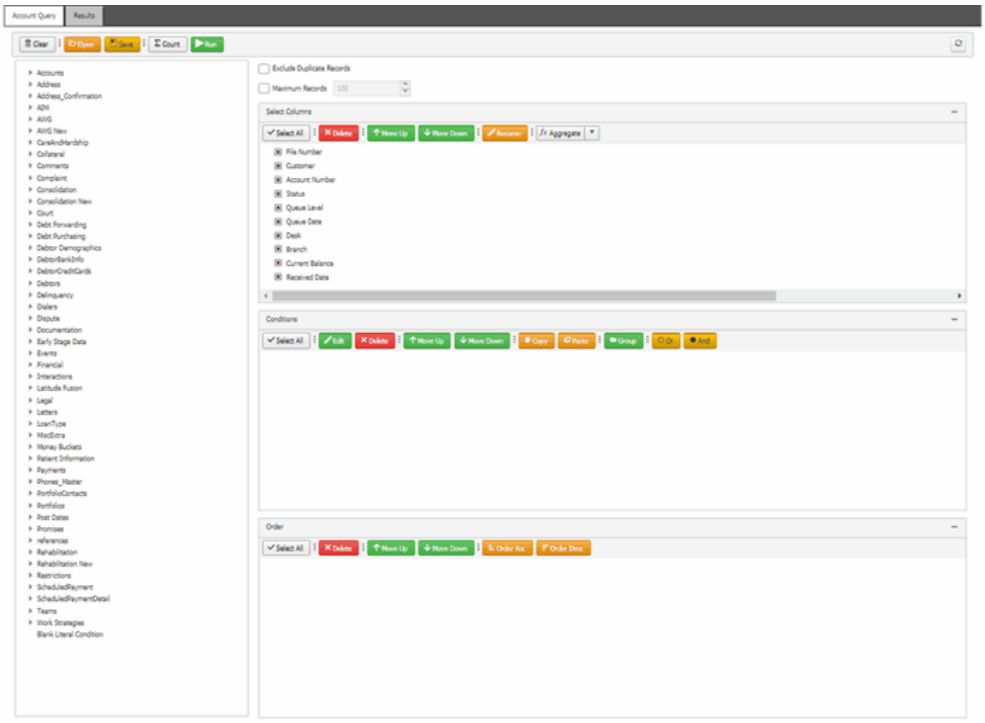
Feedback

Modify the Query Column Name

Use the **Select Columns** pane on the **Account Analysis** page to modify the name of a column included in the query results.

To modify the name of a query column

1. Ensure that a query is open on the **Account Analysis** page.



2. In the **Select Columns** pane, click the column and then click **Rename**. The column name changes to a box to allow you to modify it.

3. In the box, type the new name for the column and then press **Enter**. The original column name appears with the new name appended. For example, if you changed the **Current Balance** column to **Account Balance**, the column name changes to **Current Balance as Account Balance**.

Related Topics

Query Columns

Create an Account Analysis Query

Modify an Account Analysis Query

Account Analysis

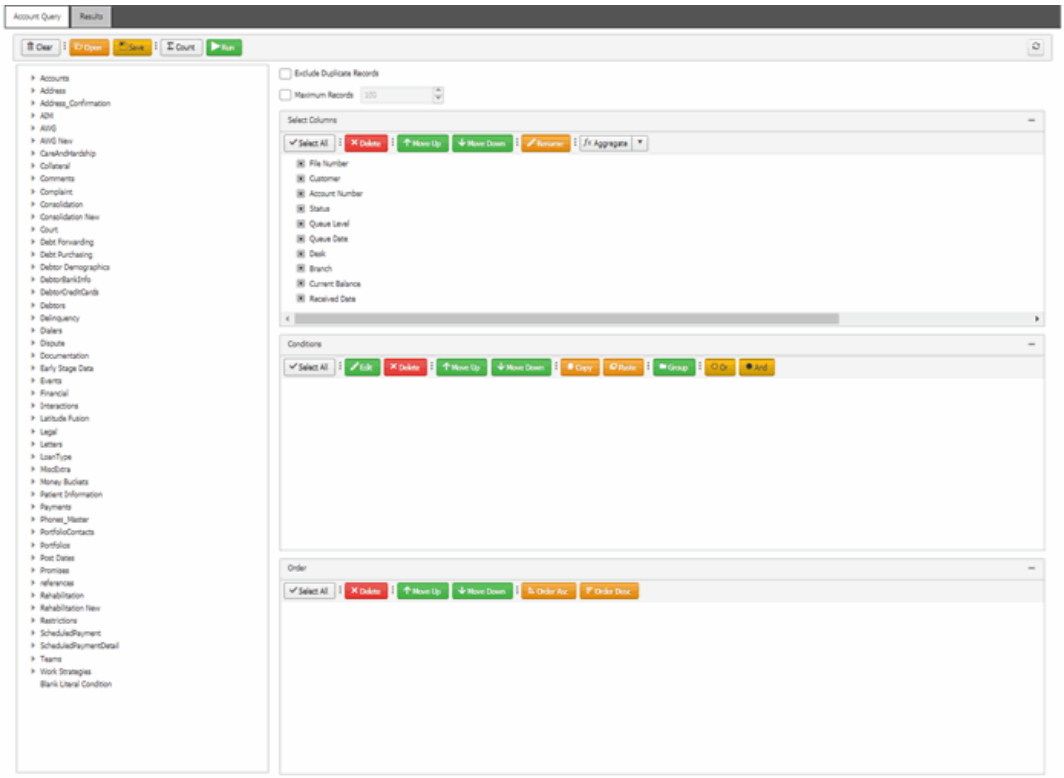
Feedback

Assign an Aggregate Function to a Column

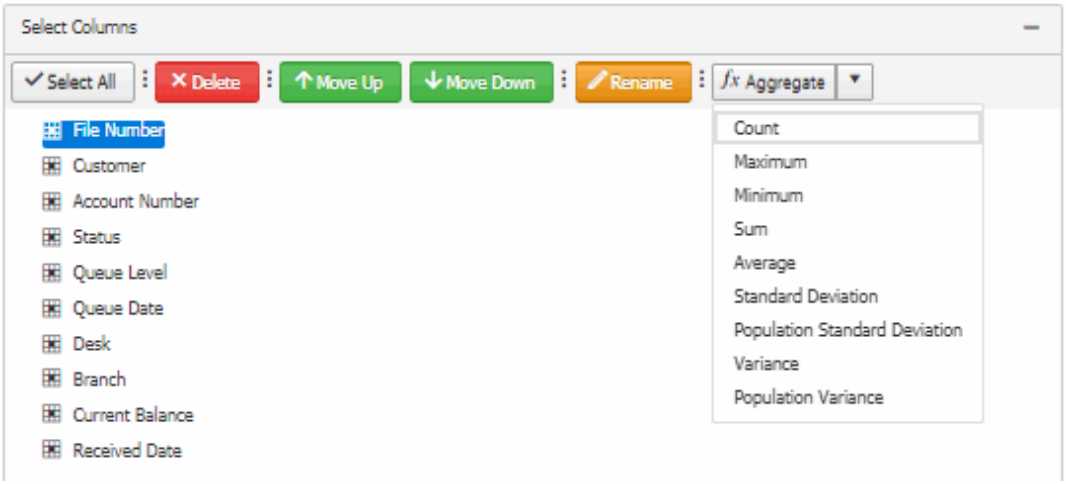
Use the **Select Columns** pane on the **Account Analysis** page to assign an aggregate function to a column. When you run the query, the aggregated values appear in the column instead of the actual value. Non-aggregated columns create the groups represented by the aggregated data.

To assign an aggregate function to a column

1. Ensure that a query is open on the **Account Analysis** page.



2. In the **Select Columns** pane, click the column and then click **fx Aggregate**.



3. In the list box, click a function. The original column name appears with the aggregate function name appended. For example, if you selected the "average" function for the **Current Balance** column, the **Current Balance** column name changes to **Average of Current Balance**.

4. To delete an aggregated function, click the aggregated column name, click **fx Aggregate**, and then, in the list box, click **Remove Aggregate**. The original column name replaces the aggregated column name.

Related Topics

Aggregate Functions

Account Analysis

Aggregate Functions

The following table describes the functions that are available when aggregating data. The functions available for an item are based on the item's data type.

Function	Description
Count	Counts the number of records for the grouping.
Maximum	Calculates the highest value within the grouping.
Minimum	Calculates the lowest value within the grouping.
Sum	Totals the values within the grouping.
Average	Averages the values within the grouping.
Standard Deviation	Averages the difference from the mean value of the entire set of accounts included.
Population Standard Deviation	Averages the difference from the mean value within the grouping.
Variance	Squares the standard deviation.
Population Variance	Squares the standard deviation within the grouping.
Eliminate Duplicates	Changes the equation to add the "distinct" clause. You can use this function with any aggregate after the initial selection.
Remove Aggregate	Deletes the aggregate function and returns the column to its literal value.

Related Topics

Assign an Aggregate Function to a Column

Account Analysis

Query Conditions

Feedback

Query Conditions

Use the **Conditions** pane on the **Account Analysis** page to specify the criteria for data to include in the query result set.

Related Topics

Create a Query Condition

Modify a Query Condition

Copy a Query Condition

Group Query Conditions

Modify the Query Condition Order

Delete a Query Condition

Query Condition Types

Account Analysis

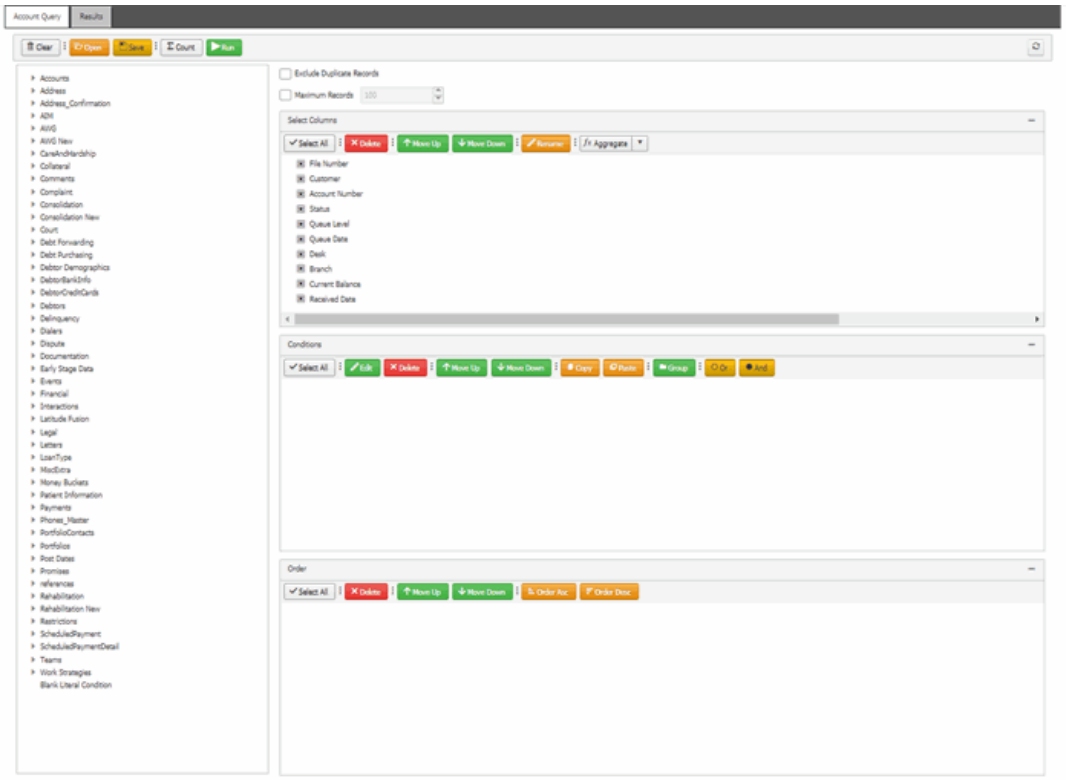
Feedback

Create a Query Condition

Use the **Conditions** pane on the **Account Analysis** page to specify the criteria for which data to include in the query results.

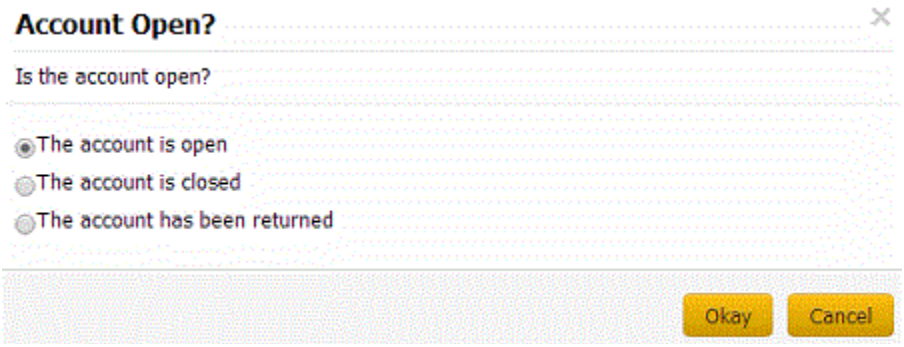
To create a query condition

1. Ensure that a query is open on the **Account Analysis** page.



2. In the **Data Selection** tree, expand nodes to locate the data item to include as a condition.
3. Drag and drop the data item into the **Conditions** pane or right-click the data item and select **Add to Conditions** from the list.

The following example shows the criteria for the **Account Open?** condition.



4. Specify the criteria, and then click **OK**.
5. Continue adding conditions as necessary.
6. To apply the And operator, do the following:
    a. After adding the required conditions to the **Conditions** pane, click And.
    b. In the toolbar, click **Count**. The results appear in the **Query Designer** dialog box. Click **OK**.
7. To apply the OR operator, do the following:
    a. After adding the required conditions to the **Conditions** pane, click **Or**.
    b. In the toolbar, click **Count**. The results appear in the **Query Designer** dialog box. Click **OK**.

Related Topics

Query Conditions

Create an Account Analysis Query

Modify an Account Analysis Query

Account Analysis

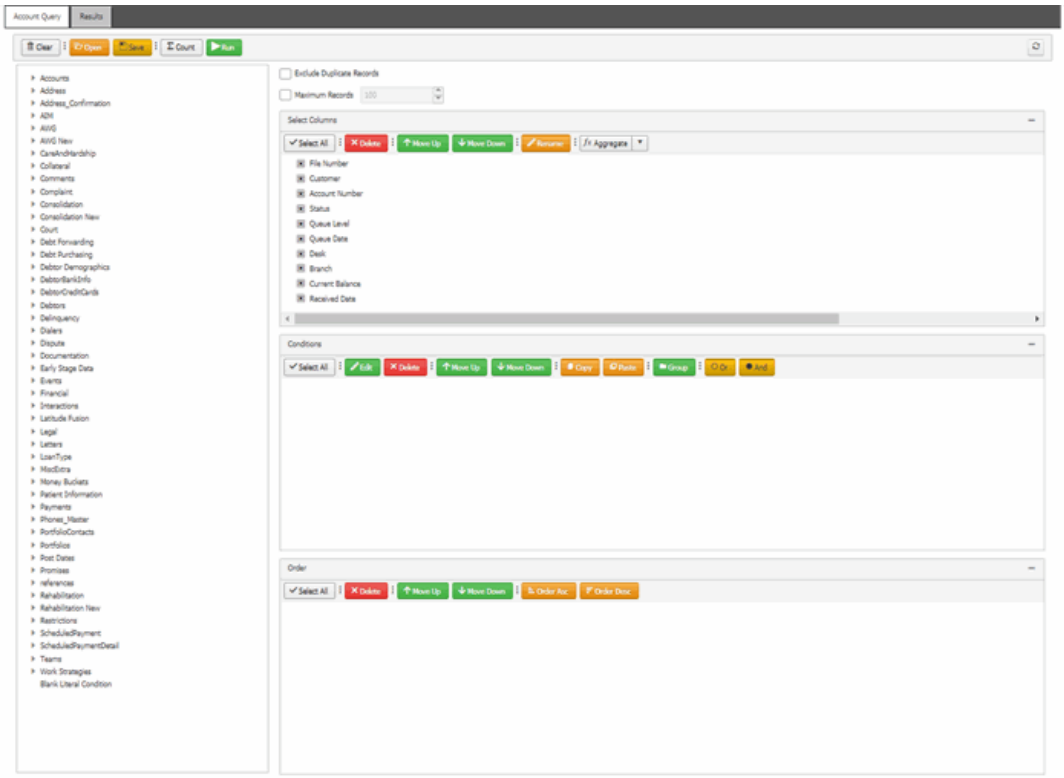
Feedback

Modify a Query Condition

Use the **Conditions** pane on the **Account Analysis** page to modify a query condition.

To modify a query condition

1. Ensure that a query is open on the **Account Analysis** page.



2. To add a condition to the **Conditions** pane, do the following:

a. In the **Data Selection** tree, expand nodes to locate the data item to include as a condition.

b. Drag and drop the data item into the **Conditions** pane.

3. To modify the criteria for a condition, in the **Conditions** pane, do the following

    a. Click the condition and then click **Edit**.

    b. Modify the criteria and then click **OK**.

4. To apply the And operator, do the following:

    a. After adding the required conditions to the **Conditions** pane, click And.

    b. In the toolbar, click **Count**. The results appear in the **Query Designer** dialog box. Click **OK**.

5. To apply the OR operator, do the following:

    a. After adding the required conditions to the **Conditions** pane, click **Or**.

    b. In the toolbar, click **Count**. The results appear in the **Query Designer** dialog box. Click **OK**.

Related Topics

Query Conditions

Create an Account Analysis Query

Modify an Account Analysis Query

Account Analysis

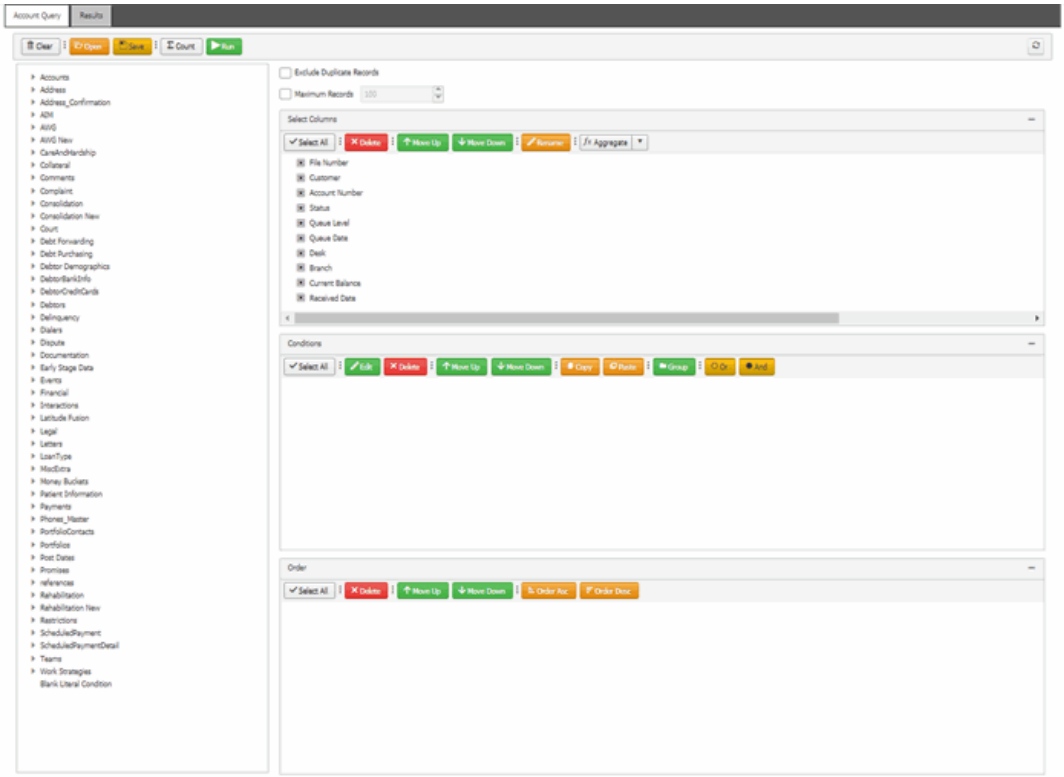
Feedback

Copy a Query Condition

Use the **Conditions** pane on the **Account Analysis** page to copy a query condition.

To copy a query condition

1. Ensure that a query is open on the **Account Analysis** page.



2. In the **Conditions** pane, click a condition and then, in the toolbar, click **Copy**. The system copies the condition to the Clipboard.

3. In the **Conditions** pane, click where you want to copy the condition and then click **Paste**. The system copies the condition to the specified location.

Related Topics

Query Conditions

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Modify an Account Analysis Query

Account Analysis

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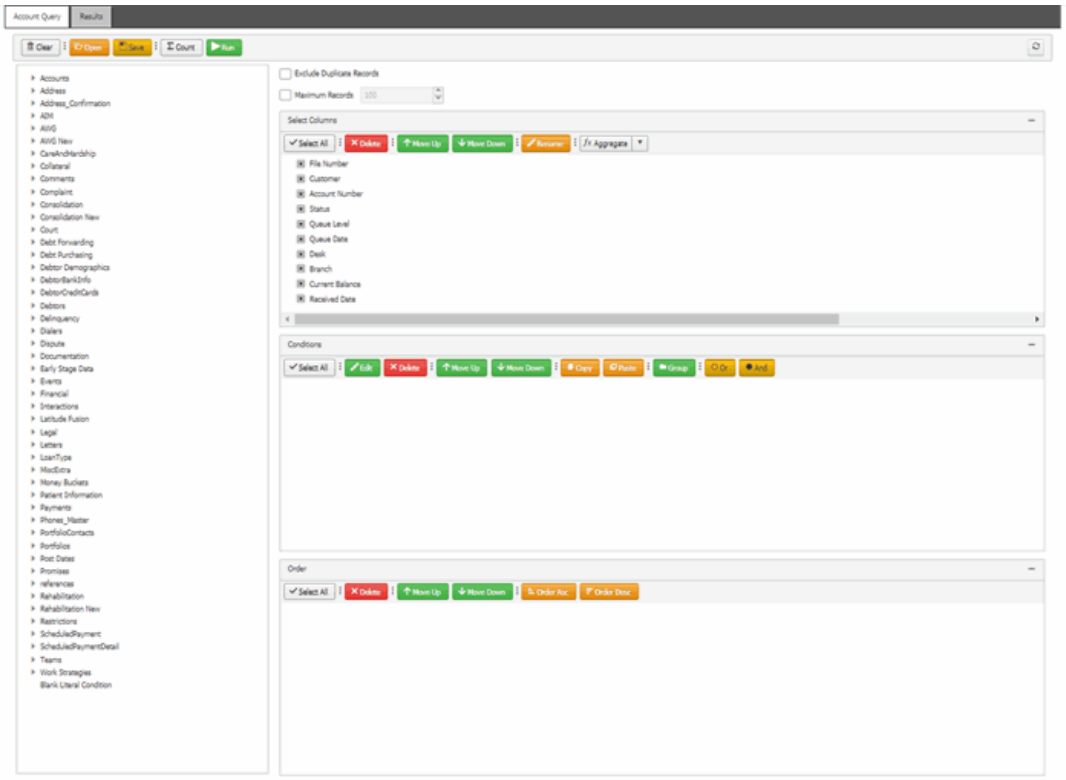
Group Query Conditions

Use the **Conditions** pane on the **Account Analysis** page to separate conditions into groups when you require complex data mining.

To group query conditions for evaluation

1. Ensure that a query is open on the **Account Analysis** page.



2. In the **Conditions** pane, click the condition to group and then click **Group**. The system groups the selected conditions and flags the beginning and ending of the group.

3. Continue grouping conditions as necessary.

Note: To remove a condition from a group, click the condition and then click **Delete**.

Related Topics

Query Conditions

Create an Account Analysis Query

Modify an Account Analysis Query

Account Analysis

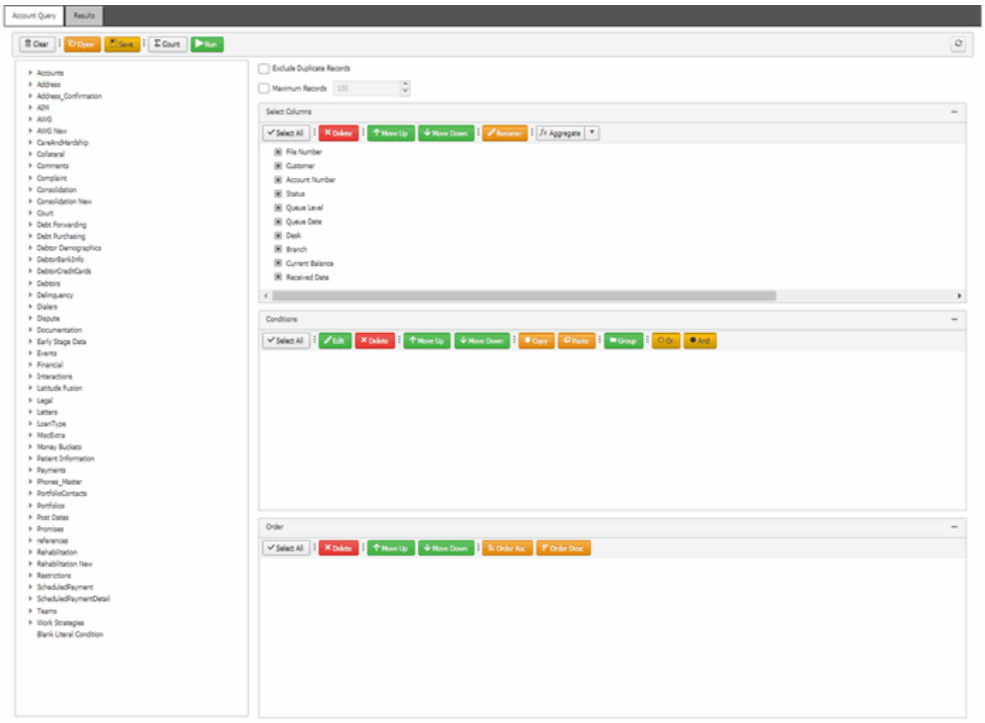
Feedback

Modify the Query Condition Order

Use the **Conditions** pane on the **Account Analysis** page to change the order in which the system evaluates conditions.

To modify the order of query conditions

1. Ensure that a query is open on the **Account Analysis** page.



2. In the **Conditions** pane, click a condition and then click **Move Up** or **Move Down**.

Related Topics

Query Conditions

Create an Account Analysis Query

Modify an Account Analysis Query

Account Analysis

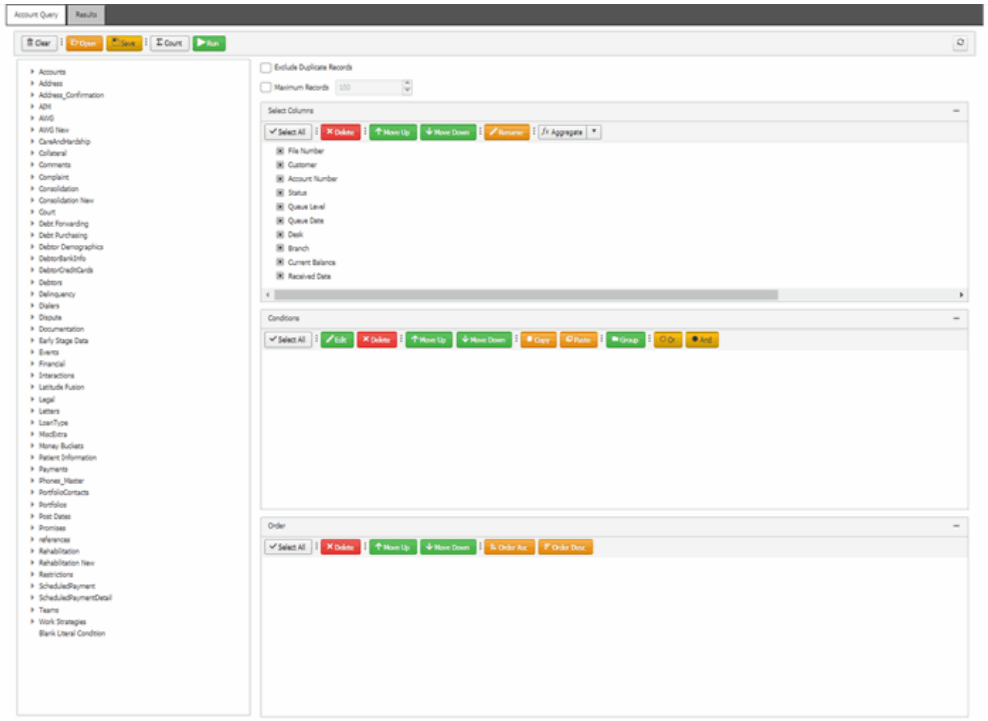
Feedback

Delete a Query Condition

Use the **Conditions** pane on the **Account Analysis** page to delete a condition from a query.

To delete a query condition

1. Ensure that a query is open on the **Account Analysis** page.



2. In the **Conditions** pane, click the condition and then click **Delete**.

Related Topics

Query Conditions

Create an Account Analysis Query

Modify an Account Analysis Query

Account Analysis

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Query Condition Types

You use query conditions when creating and running queries. For each condition you select for your query, you specify the criteria to use to evaluate accounts. The criteria available is based on the condition type.

Each condition is one of the following types:

- Dates
- Single option
- Multiple option

Dates

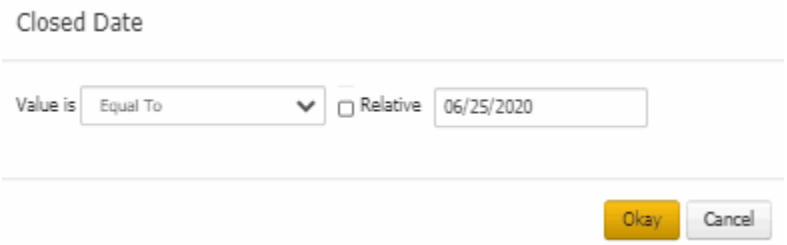
Date conditions allow you to query accounts based on a specific date, date range, any date or blank date, or relative date. When you select a date condition, a dialog box displays to allow you to specify the date criteria. The criteria available depends on the value you select in the **Value is** list box, and whether you select the **Relative** check box.

Specific date

Use one of the following comparisons to evaluate accounts based on a specific date:

Value is	Description	Example
Equal To	Include accounts in the query results where the date matches the date specified.	**Closed Date** is 01/01/2012.
Not Equal To	Include accounts in the query results where the date does not match the date specified.	**Closed Date** is any date except 01/01/2012.
Later Than or Equal To	Include accounts in the query results where the date matches or comes after the date specified.	**Closed Date** is 01/01/2012 or any date after 01/01/2012.
Earlier Than or Equal To	Include accounts in the query results where the date matches or comes before the date specified.	**Closed Date** is 01/01/2012 or any date before 01/01/2012.
Later Than	Include accounts in the query results where the date comes after the date specified.	**Closed Date** is after 01/01/2012, but not on 01/01/2012.
Earlier Than	Include accounts in the query results where the date comes before the date specified.	**Closed Date** is before 01/01/2012, but not on 01/01/2012.

In the following example, the system retrieves accounts where the **Closed Date** is 01/01/2014.

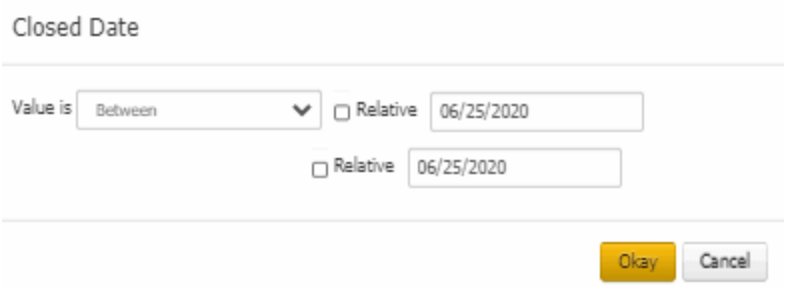


Date range

Use one of the following comparisons to evaluate accounts based on a date range:

Value is	Description
Between	Retrieves accounts where the date falls between two specific dates.
Not Between	Retrieves accounts where the date comes before a specific start date or after a specific end date, but not between the two dates.

In the following example, the system retrieves accounts where the **Closed Date** falls on or between 01/01/2014 and 06/30/2014.

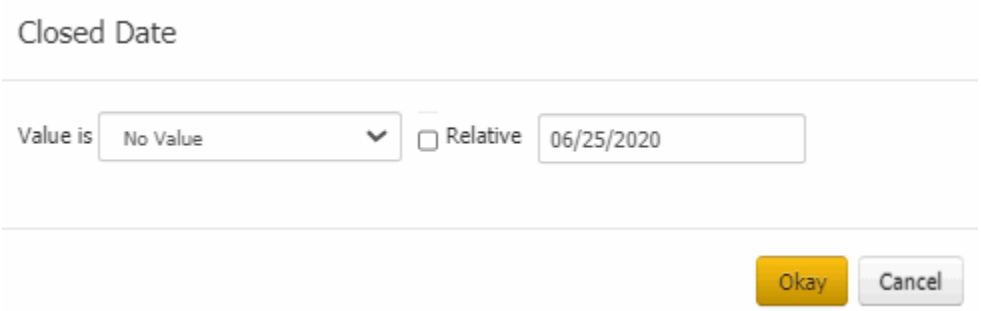


Any date or blank date

Use one of the following comparisons to evaluate accounts based on whether a date is blank or contains any value:

Value is	Description
No Value	Retrieves accounts where the date is blank.
Any Value	Retrieves accounts where the date is any date or blank.

In the following example, the system retrieves accounts where the **Closed Date** is blank (doesn't contain a value).



Relative date

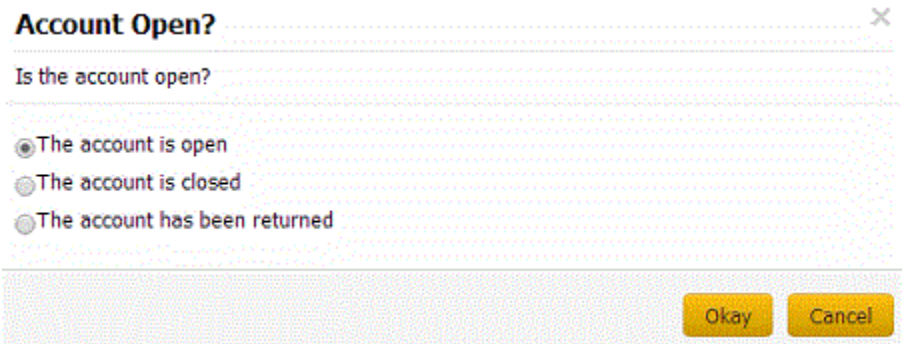
Use the relative date option to evaluate accounts based on the relation of a date to the current date. You specify a comparison and the criteria to use to calculate the relative date. The criteria are the number of days, months or years from the current date, and whether to add or subtract that number from the current date.

Use one of the following comparisons to evaluate accounts based on the calculated relative date:

Value is	Description
Equal To	Retrieves accounts where the date matches the relative date.
Not Equal To	Retrieves accounts where the date does not match the relative date.
Later Than or Equal To	Retrieves accounts where the date matches or comes after the relative date.
Earlier Than or Equal To	Retrieves accounts where the date matches or comes before the relative date.
Later Than	Retrieves accounts where the date comes after the relative date.
Earlier Than	Retrieves accounts where the date comes before the relative date.

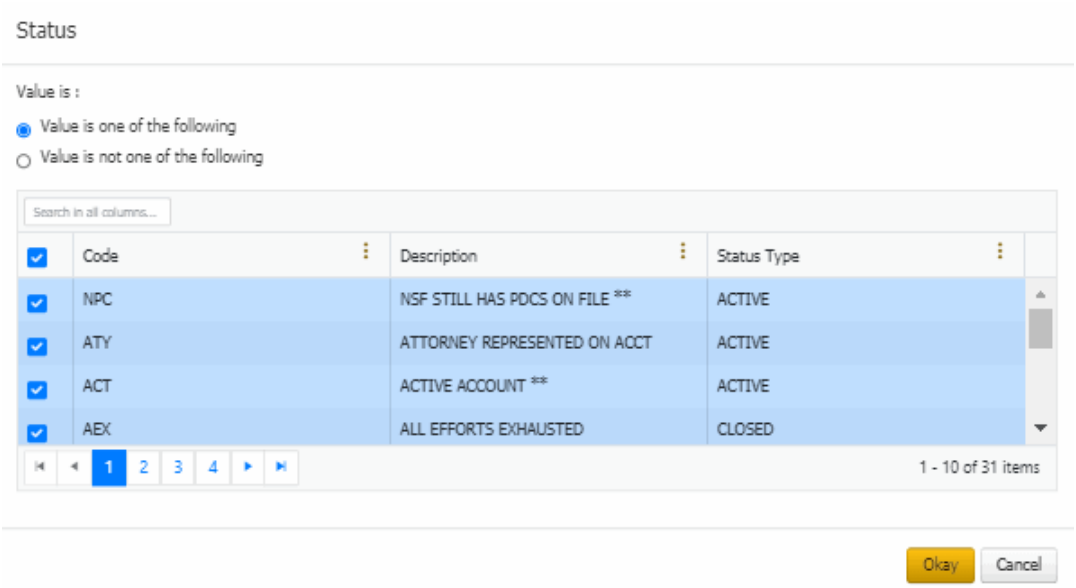
Single option

Single option conditions allow you to retrieve accounts that match a single option in a group of options. In the following example, the system retrieves accounts that are open.



Multiple options

Multiple option conditions allow you to retrieve accounts that match one or more options in a group of options. In the following example, the system retrieves multiple accounts options by selecting the check boxes.



Related Topics

[Create a Query Condition]

[Modify a Query Condition]

[Query Conditions]

[Create an Account Analysis Query]

[Modify an Account Analysis Query]

[Account Analysis]

Query Results

Feedback

Query Results

Use the **Results** tab on the **Account Analysis** page to view the results of a query and change the results view.

Related Topics

Specify the Query Results Sort Order

Arrange Query Column Headings

Pin a Query Column

Sort the Query Results

Group Accounts in the Query Results

Summarize Query Data

Export Query Results

Filter Query Results

Set Custom Filter Criteria

Custom Filter Operators

Account Analysis

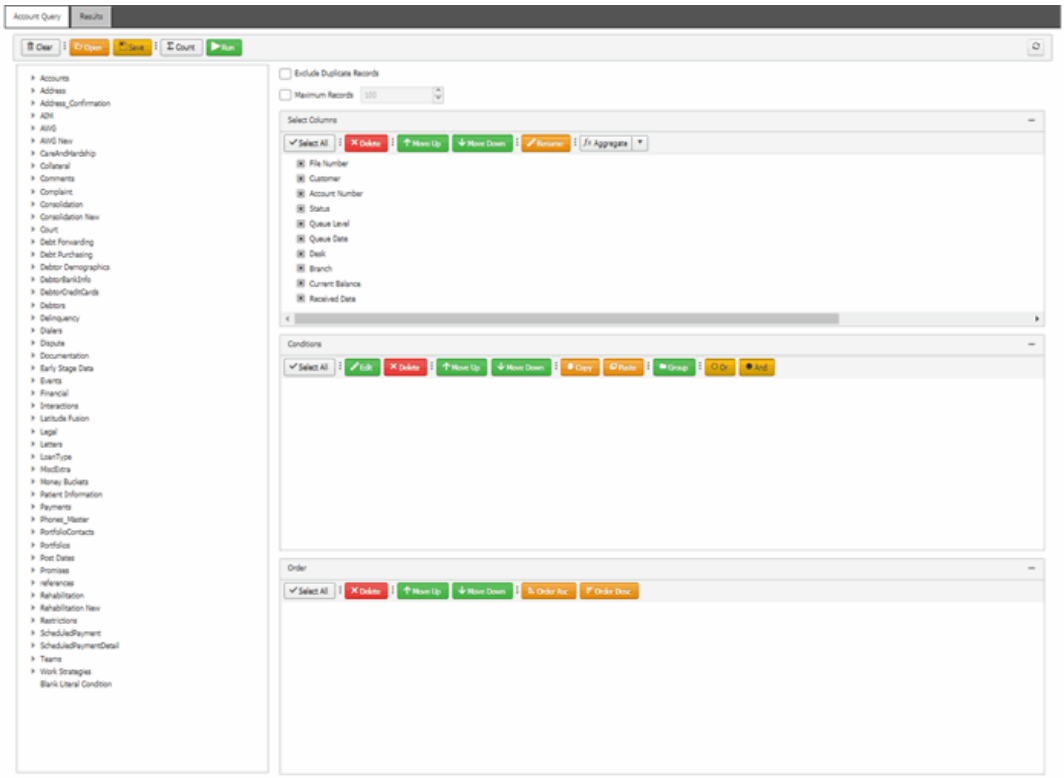
Feedback

Specify the Query Results Sort Order

Use the **Order** pane on the **Account Analysis** page to specify the sort order for the data returned in the query results. For example, if desk and customer appear in the **Order** pane, the query results sort first by desk and then by customer within the desk.

To specify the sort order for query results

1. Ensure that a query is open on the **Account Analysis** page.



2. In the **Data Selection** tree, expand nodes to locate the data item to include as a column.
3. Drag and drop the data item into the **Select Columns** pane.
4. Continue adding data items as necessary.

Note: You can sort by aggregate data by dragging the aggregated column from the **Select Columns** pane and dropping it into the **Order** pane. For more information about aggregating data, see Assign an Aggregate Function to a Column.

5. To delete a data item from the sort, in the **Order** pane, click the data item and then click **Delete**.
6. To change the sort order, in the **Order** pane, click the data item and then click **Move Up** or **Move Down**.
7. To sort in ascending order, in the **Order** pane, click the data item and then click **Order Asc**.
8. To sort in descending order, in the **Order** pane, click the data item and then click **Order Desc**.

Related Topics

Query Results

Create an Account Analysis Query

Modify an Account Analysis Query

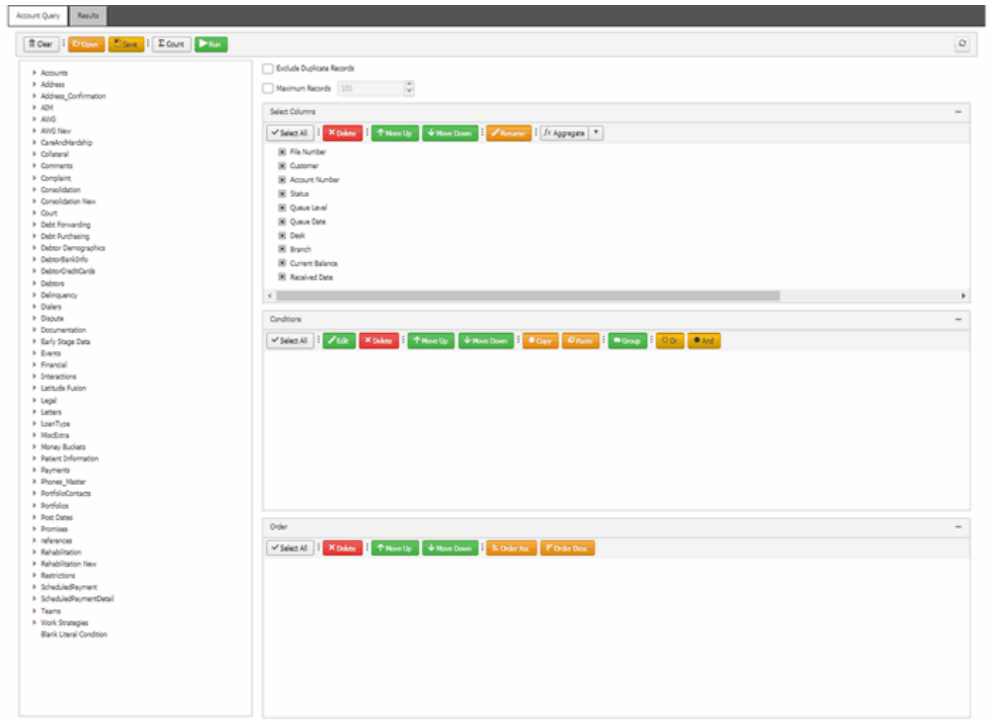
Account Analysis

Arrange Query Column Headings

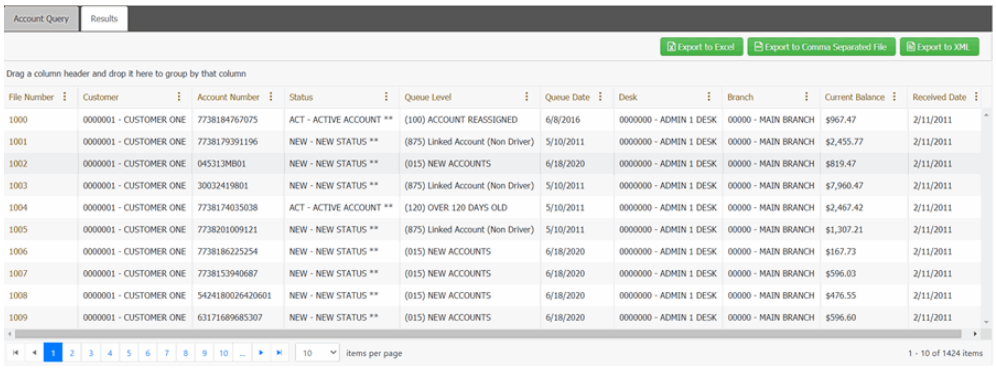
Use the **Results** tab on the **Account Analysis** page to change the order in which columns appear in the query results.

To arrange query column headings

1. Ensure that a query is open on the **Account Analysis** page.



2. In the toolbar, click **Run**. The results appear on the **Results** tab.



File Number	Customer	Account Number	Status	Queue Level	Queue Date	Desk	Branch	Current Balance	Received Date
1000	0000001 - CUSTOMER ONE	7738184767075	ACT - ACTIVE ACCOUNT **	(100) ACCOUNT REASSIGNED	6/8/2016	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$967.47	2/11/2011
1001	0000001 - CUSTOMER ONE	7738179391196	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$2,455.77	2/11/2011
1002	0000001 - CUSTOMER ONE	045313MB01	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$819.47	2/11/2011
1003	0000001 - CUSTOMER ONE	30032419801	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$7,960.47	2/11/2011
1004	0000001 - CUSTOMER ONE	7738174035038	ACT - ACTIVE ACCOUNT **	(120) OVER 120 DAYS OLD	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$2,467.42	2/11/2011
1005	0000001 - CUSTOMER ONE	7738201009121	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$1,307.21	2/11/2011
1006	0000001 - CUSTOMER ONE	7738186225254	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$167.73	2/11/2011
1007	0000001 - CUSTOMER ONE	7738153940687	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$596.03	2/11/2011
1008	0000001 - CUSTOMER ONE	5424180026420601	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$476.55	2/11/2011
1009	0000001 - CUSTOMER ONE	6317168968530	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$596.60	2/11/2011

3. Click a column heading and drag it to the new location.

4. When a black arrows appears in the location where you want to place the column, release your mouse.

Related Topics

[Query Results]

[Create an Account Analysis Query]

[Modify an Account Analysis Query]

[Account Analysis]

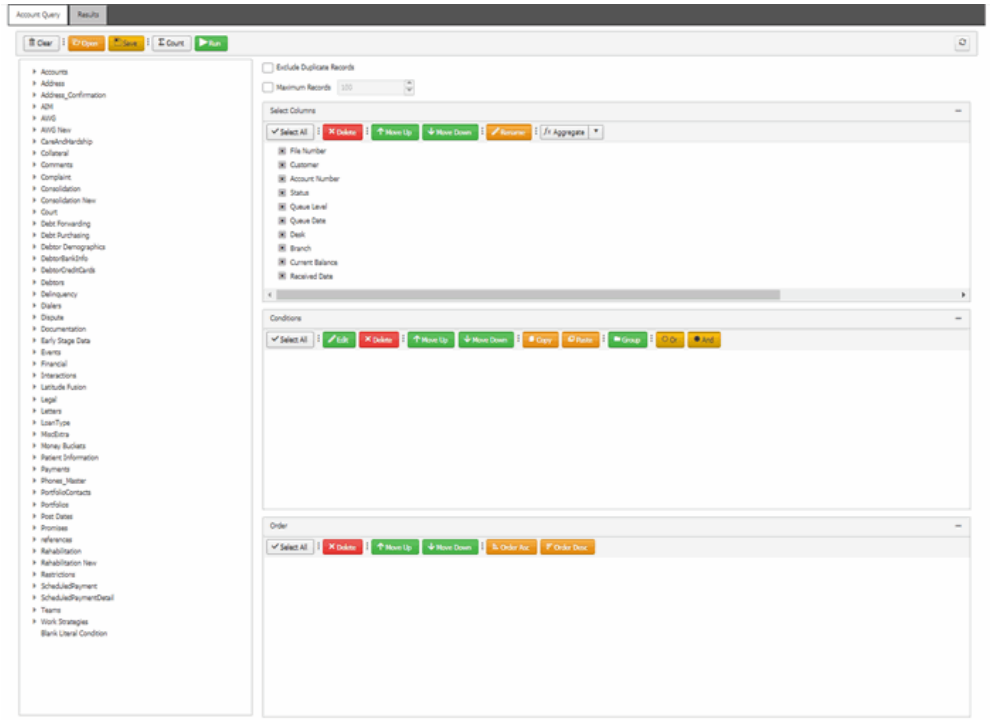
Feedback

Pin a Query Column

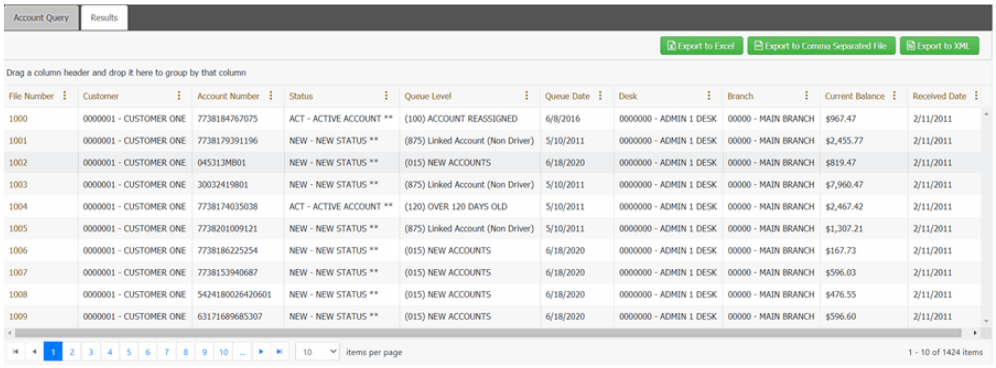
Use the **Results** tab on the **Account Analysis** page to pin a column in the query results so that it remains stationary when you scroll horizontally.

To pin a query column

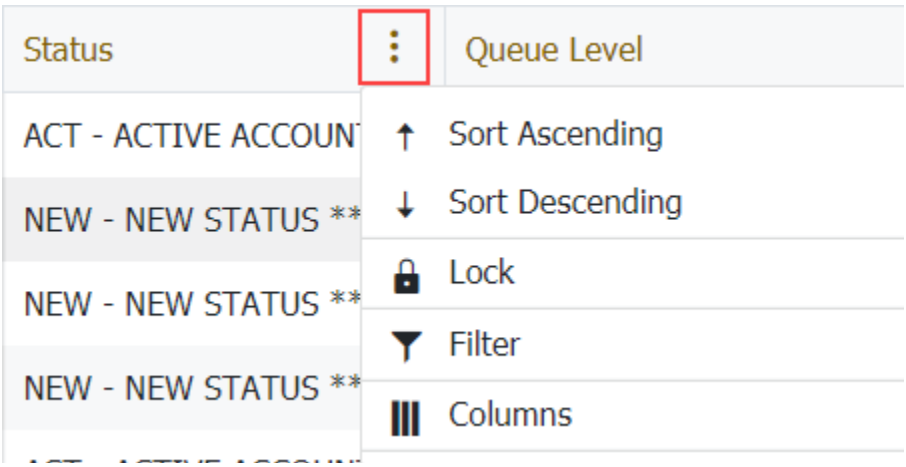
1. Ensure that a query is open on the **Account Analysis** page.



2. In the toolbar, click **Run**. The results appear on the **Results** tab.



3. In the column heading, click the column menu and then click **Lock**.



4. Scroll horizontally in either direction and the locked column remains stationary.
5. To unlock the column, click the lock column menu and then click **Unlock**.

Related Topics

Query Results

Create an Account Analysis Query

Modify an Account Analysis Query

Account Analysis

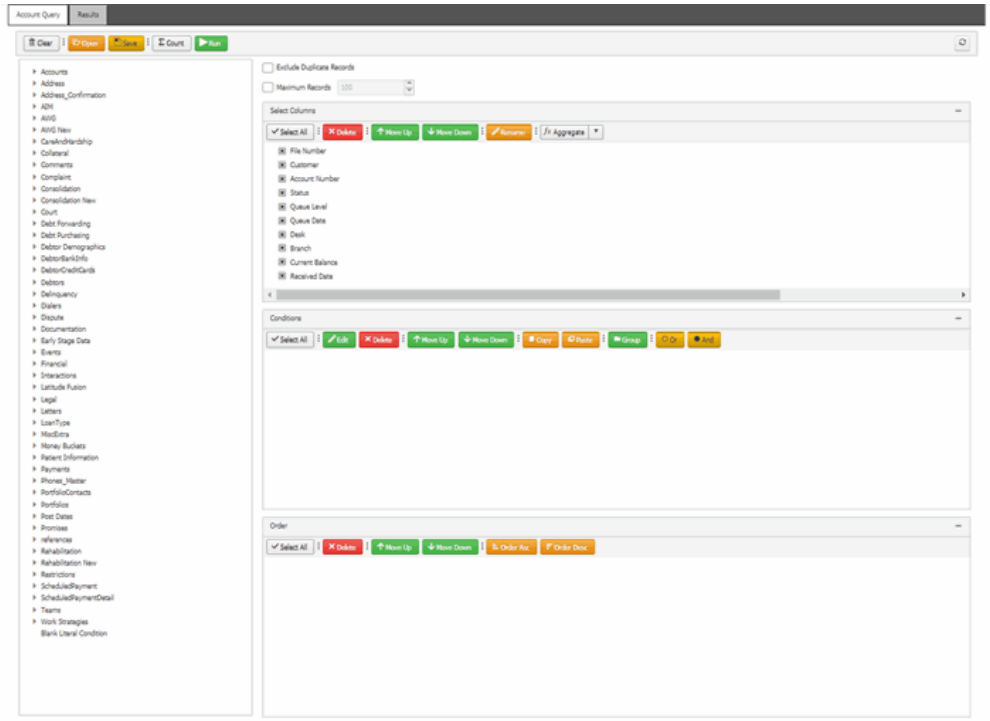
Feedback

Sort the Query Results

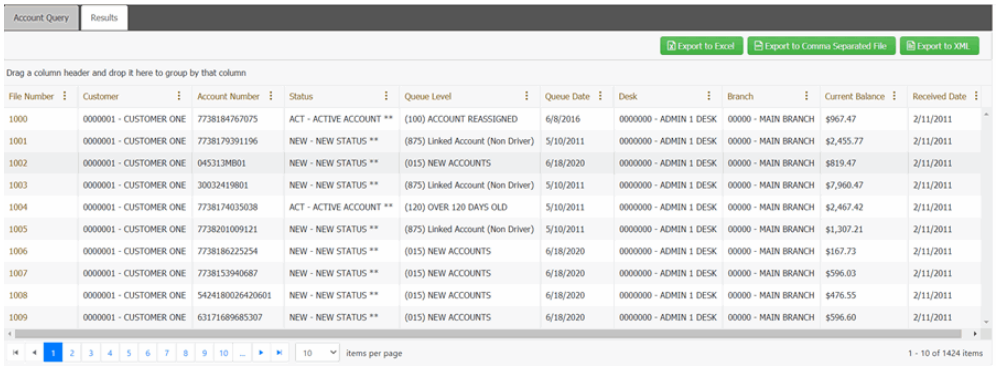
Use the **Results** tab on the **Account Analysis** page to sort the query results.

To sort query results

1. Ensure that a query is open on the **Account Analysis** page.

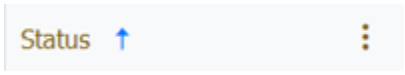


2. In the toolbar, click **Run**. The results appear on the **Results** tab.



File Number	Customer	Account Number	Status	Queue Level	Queue Date	Desk	Branch	Current Balance	Received Date
1000	0000001 - CUSTOMER ONE	7738184767075	ACT - ACTIVE ACCOUNT **	(100) ACCOUNT REASSIGNED	6/8/2016	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$967.47	2/11/2011
1001	0000001 - CUSTOMER ONE	7738179391196	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$2,455.77	2/11/2011
1002	0000001 - CUSTOMER ONE	045313MB01	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$819.47	2/11/2011
1003	0000001 - CUSTOMER ONE	30032419801	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$7,960.47	2/11/2011
1004	0000001 - CUSTOMER ONE	7738174035038	ACT - ACTIVE ACCOUNT **	(120) OVER 120 DAYS OLD	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$2,467.42	2/11/2011
1005	0000001 - CUSTOMER ONE	7738201009121	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$1,307.21	2/11/2011
1006	0000001 - CUSTOMER ONE	7738186225254	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$167.73	2/11/2011
1007	0000001 - CUSTOMER ONE	7738153940687	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$596.03	2/11/2011
1008	0000001 - CUSTOMER ONE	5424180026420601	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$476.55	2/11/2011
1009	0000001 - CUSTOMER ONE	6317168968530	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$596.60	2/11/2011

3. To sort the column in ascending order, click the column menu and then click **Sort Ascending**. An arrow appears and points up to indicate that the column sorted in ascending order.



4. To sort the column in descending order, click the column menu and then click **Sort Descending**. The arrow points down to indicate that the column sorted in descending order.

Related Topics

Query Results

Create an Account Analysis Query

Modify an Account Analysis Query

Account Analysis

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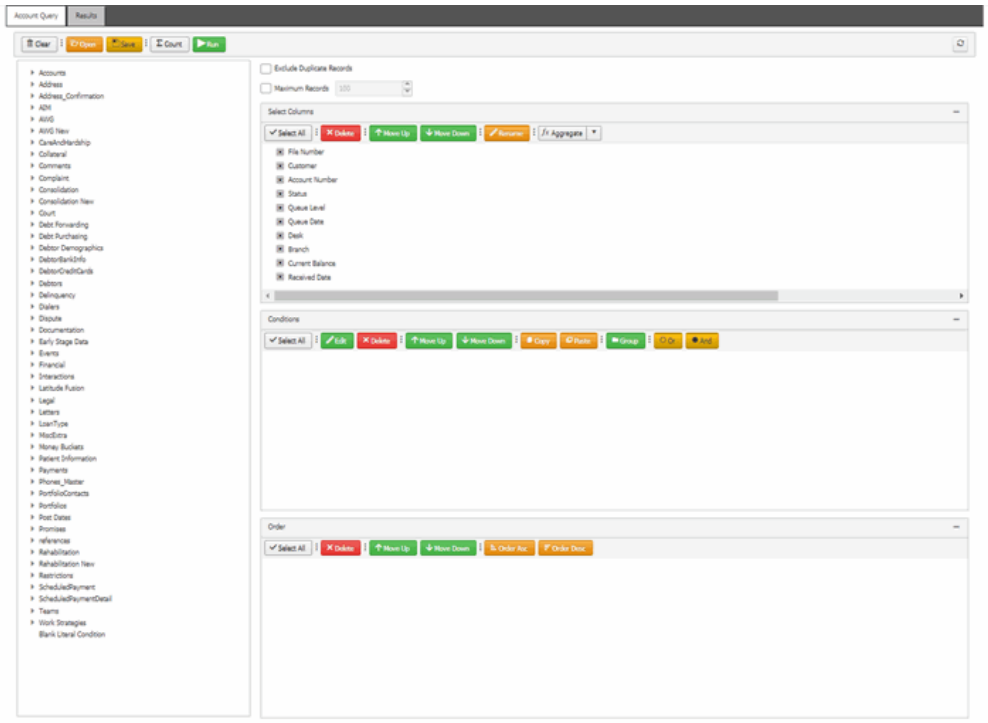
Add or Remove a Query Column

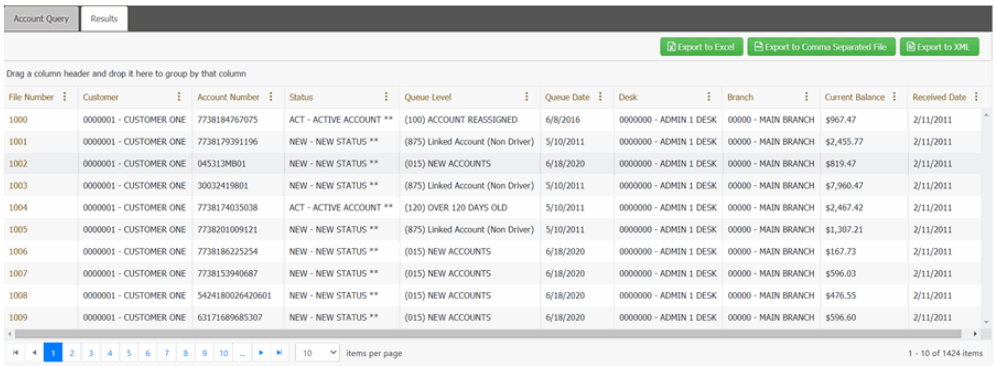
Use the **Results** tab on the **Account Analysis** page to add or remove a column from the query results.

To add or remove a query column

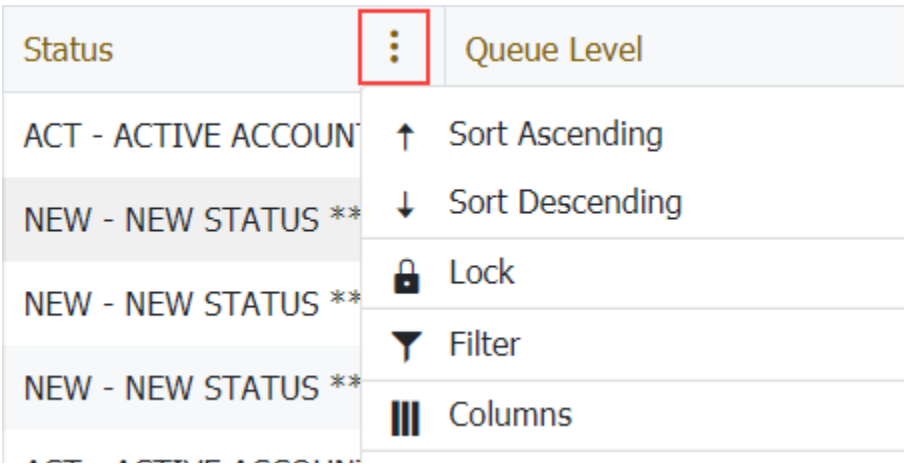
1. Ensure that a query is open on the **Account Analysis** page.



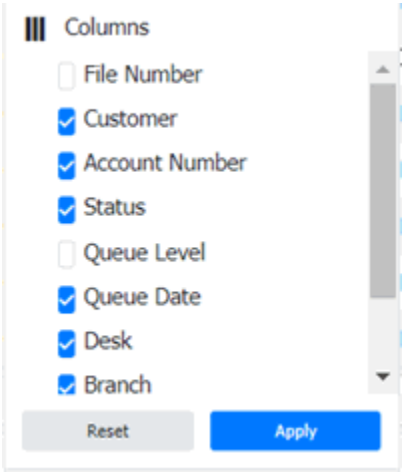
2. In the toolbar, click **Run**. The results appear on the **Results** tab.



3. In the column heading, click the column menu and then click **Columns**.



4. To add a column, select the required column check boxes from the **Columns** list and click **Apply**.



4. To remove a column, clear the column check box from the **Columns** list and click **Apply**.

Related Topics

Query Results

Create an Account Analysis Query

Modify an Account Analysis Query

Account Analysis

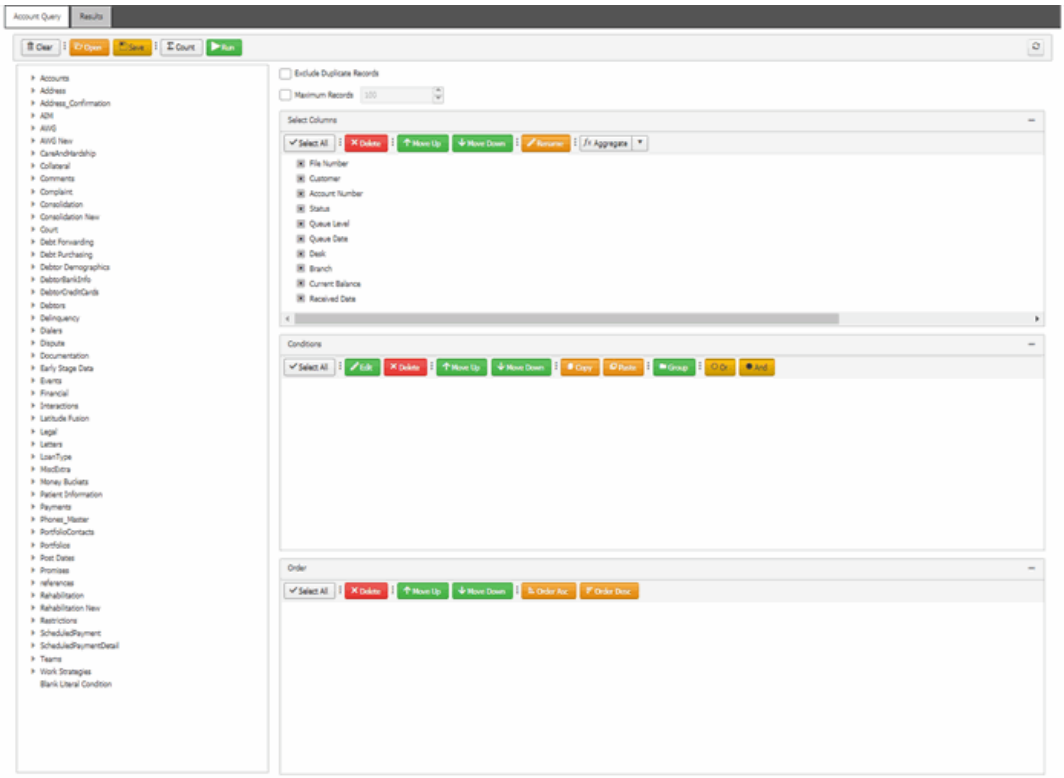
Feedback

Group Accounts in the Query Results

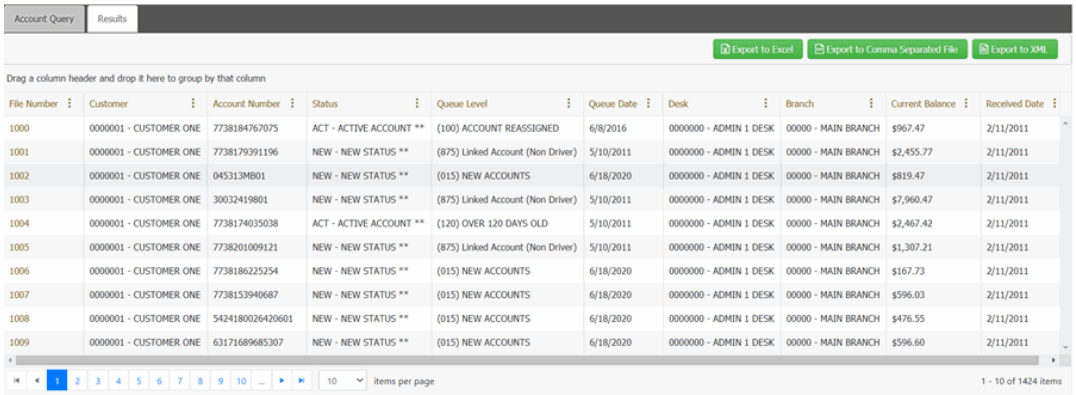
Use the **Results** tab on the **Account Analysis** page to group accounts in the query results.

To group accounts in the query results

1. Ensure that a query is open on the **Account Analysis** page.



2. In the toolbar, click **Run**. The results appear on the **Results** tab.



File Number	Customer	Account Number	Status	Queue Level	Queue Date	Desk	Branch	Current Balance	Received Date
1000	0000001 - CUSTOMER ONE	7738184767075	ACT - ACTIVE ACCOUNT **	(100) ACCOUNT REASSIGNED	6/8/2016	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$967.47	2/11/2011
1001	0000001 - CUSTOMER ONE	7738179391196	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$2,455.77	2/11/2011
1002	0000001 - CUSTOMER ONE	045313MB01	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$819.47	2/11/2011
1003	0000001 - CUSTOMER ONE	30032419801	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$7,960.47	2/11/2011
1004	0000001 - CUSTOMER ONE	7738174035038	ACT - ACTIVE ACCOUNT **	(120) OVER 120 DAYS OLD	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$2,467.42	2/11/2011
1005	0000001 - CUSTOMER ONE	7738201009121	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$1,307.21	2/11/2011
1006	0000001 - CUSTOMER ONE	7738186225254	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$167.73	2/11/2011
1007	0000001 - CUSTOMER ONE	7738153940687	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$596.03	2/11/2011
1008	0000001 - CUSTOMER ONE	5424180026420601	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$476.55	2/11/2011
1009	0000001 - CUSTOMER ONE	63171689685307	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$596.60	2/11/2011

3. Click a column heading and then drag it into the space above the column headings. Accounts group on the specified column. The following example shows accounts grouped by customer.

4. To view the accounts in a group, click the arrow next to the group to expand it.

5. To add a group within a group, click a column heading, drag it into the space above the column headings, and drop it.

6. To change the sort for a group, click the arrow next to the group header. Groups sort in ascending order by default.

7. To delete a group, click X next to the group header.

Related Topics

Query Results

Create an Account Analysis Query

Modify an Account Analysis Query

Account Analysis

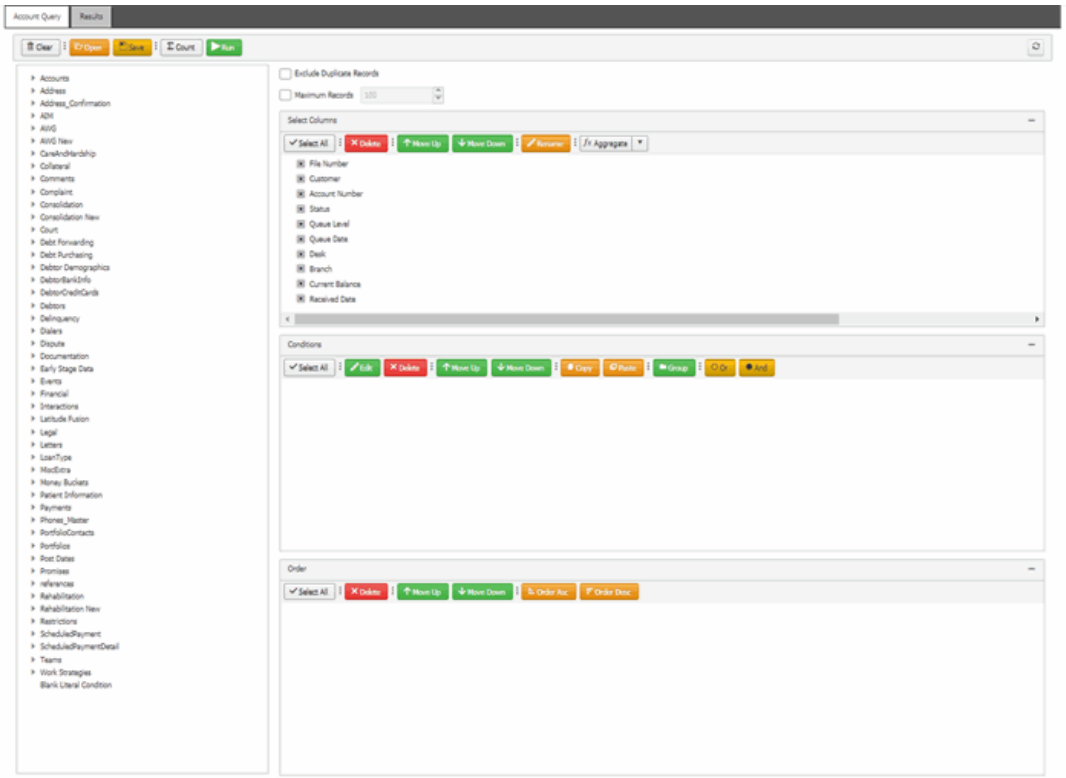
Feedback

Summarize Query Data

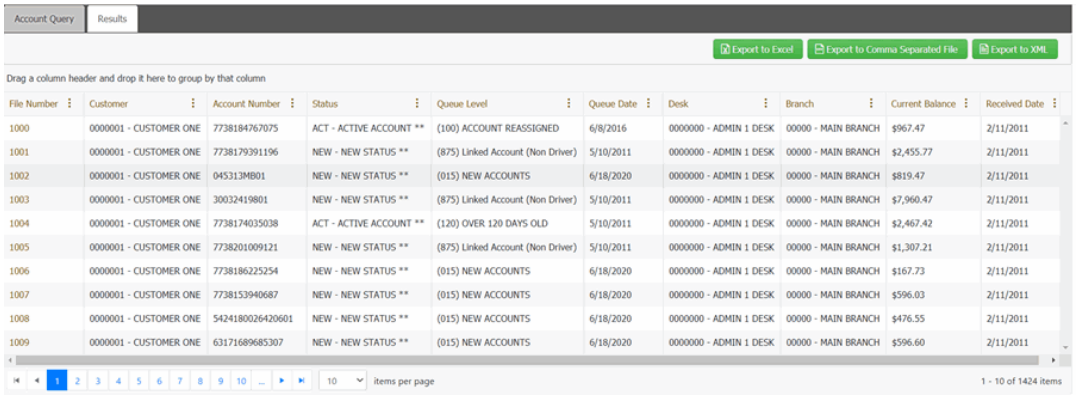
Use the **Results** tab on the **Account Analysis** page to summarize query results.

To summarize query results

1. Ensure that a query is open on the **Account Analysis** page.

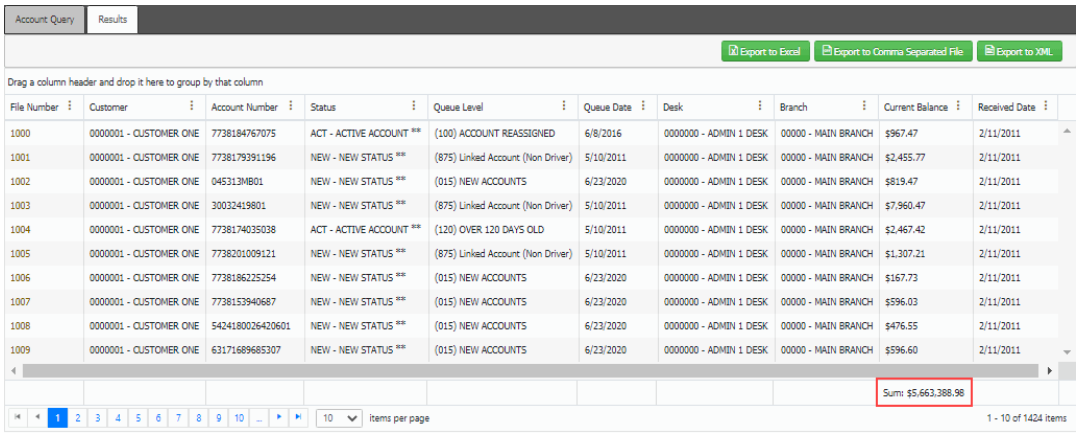


2. In the toolbar, click **Run**. The results appear on the **Results** tab.



3. In the column heading, click the column menu and then click **Aggregates** and select **Sum**.

3. The summary information is displayed at the bottom of the grid.



4. To remove the summary information, click the column menu and then click **Aggregates** and then select **Sum** again.

Related Topics

Query Results

Create an Account Analysis Query

Modify an Account Analysis Query

Account Analysis

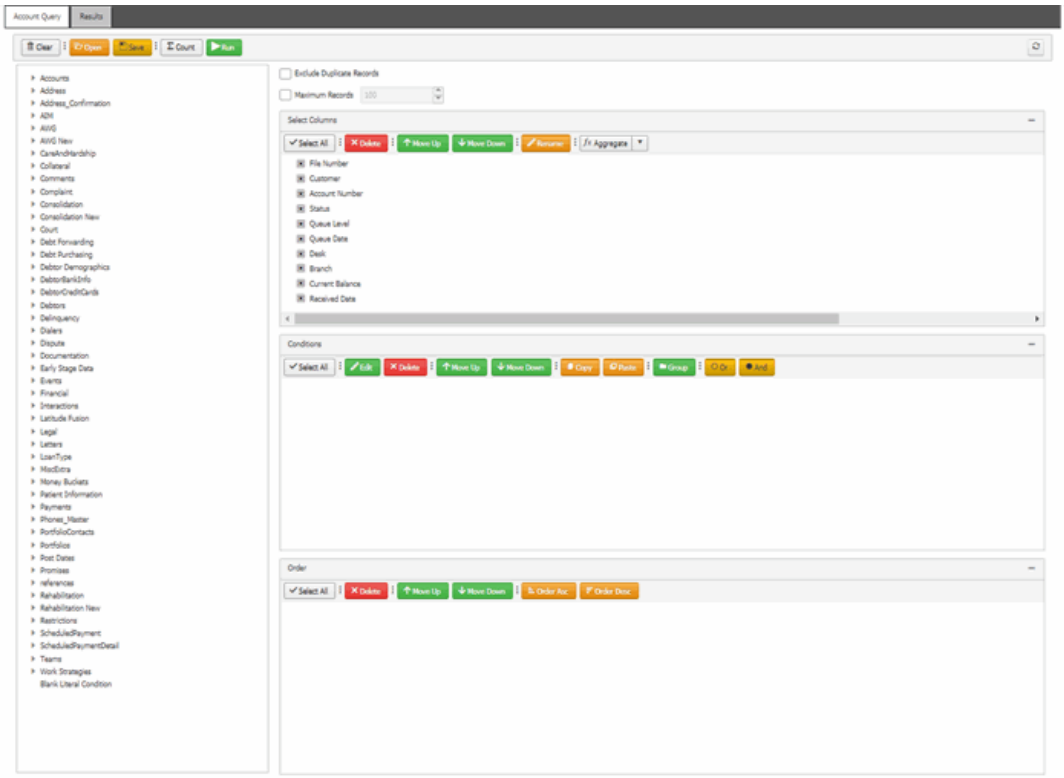
Feedback

Export Query Results

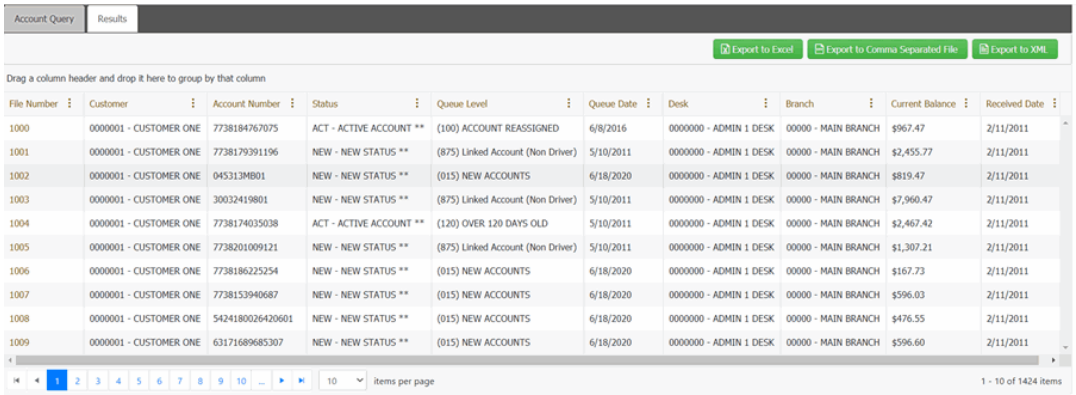
Use the **Results** tab on the **Account Analysis** page to export the results of a query.

To export query results

1. Ensure that a query is open on the **Account Analysis** page.



2. In the toolbar, click **Run**. The results appear on the **Results** tab.



File Number	Customer	Account Number	Status	Queue Level	Queue Date	Desk	Branch	Current Balance	Received Date
1000	0000001 - CUSTOMER ONE	7738184767075	ACT - ACTIVE ACCOUNT **	(100) ACCOUNT REASSIGNED	6/8/2016	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$967.47	2/11/2011
1001	0000001 - CUSTOMER ONE	7738179391196	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$2,455.77	2/11/2011
1002	0000001 - CUSTOMER ONE	045313MB01	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$819.47	2/11/2011
1003	0000001 - CUSTOMER ONE	30032419801	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$7,960.47	2/11/2011
1004	0000001 - CUSTOMER ONE	7738174035038	ACT - ACTIVE ACCOUNT **	(120) OVER 120 DAYS OLD	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$2,467.42	2/11/2011
1005	0000001 - CUSTOMER ONE	7738201009121	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$1,307.21	2/11/2011
1006	0000001 - CUSTOMER ONE	7738186225254	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$167.73	2/11/2011
1007	0000001 - CUSTOMER ONE	7738153940687	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$596.03	2/11/2011
1008	0000001 - CUSTOMER ONE	5424180026420601	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$476.55	2/11/2011
1009	0000001 - CUSTOMER ONE	63171689685307	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	$596.60	2/11/2011

3. To export the results, do one of the following:

   - To export the query results to an Excel file, in the toolbar, click **Export to Excel**.
   - To export the query results to a comma-separated value (CSV) file, in the toolbar, click **Export to Comma Separated File**. The file includes a heading row, with values contained in quotes and separated by commas.
   - To export the query results to an XML file, in the toolbar, click **Export to XML**. In the file, the column names appear as the element tags.

   The corresponding **Export** file downloads.

Related Topics

[Import Query Results]

Query Results

Create an Account Analysis Query

Modify an Account Analysis Query

Account Analysis

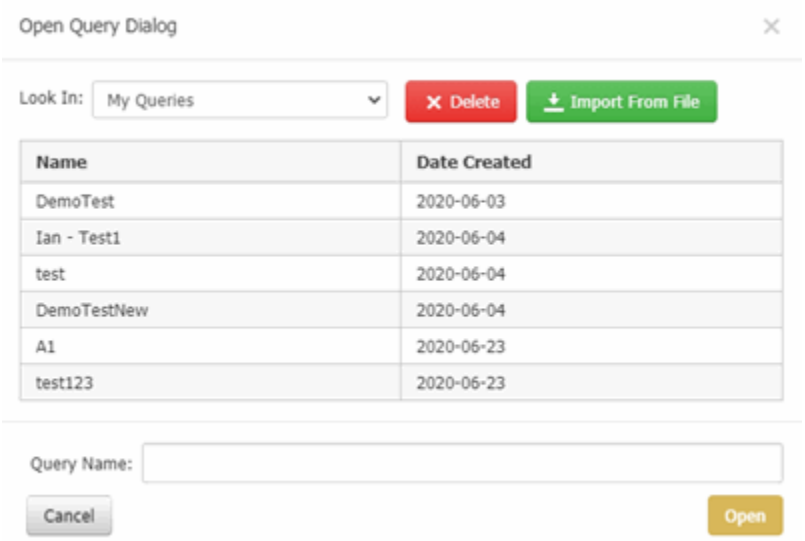
Feedback

Import Query Results

Use the **Account Query** tab on the **Account Analysis** page to import the results of a query.

To import a query, do the following:

1. In the toolbar, click **Open**. The **Save Query Dialog** box appears.



2. Click **Import From File**, select the required file and click **Open**.

Note: If required, you can import a Latitude 10 query into Liquid Latitude.

Related Topics

Export Query Results

Query Results

Create an Account Analysis Query

Modify an Account Analysis Query

Account Analysis

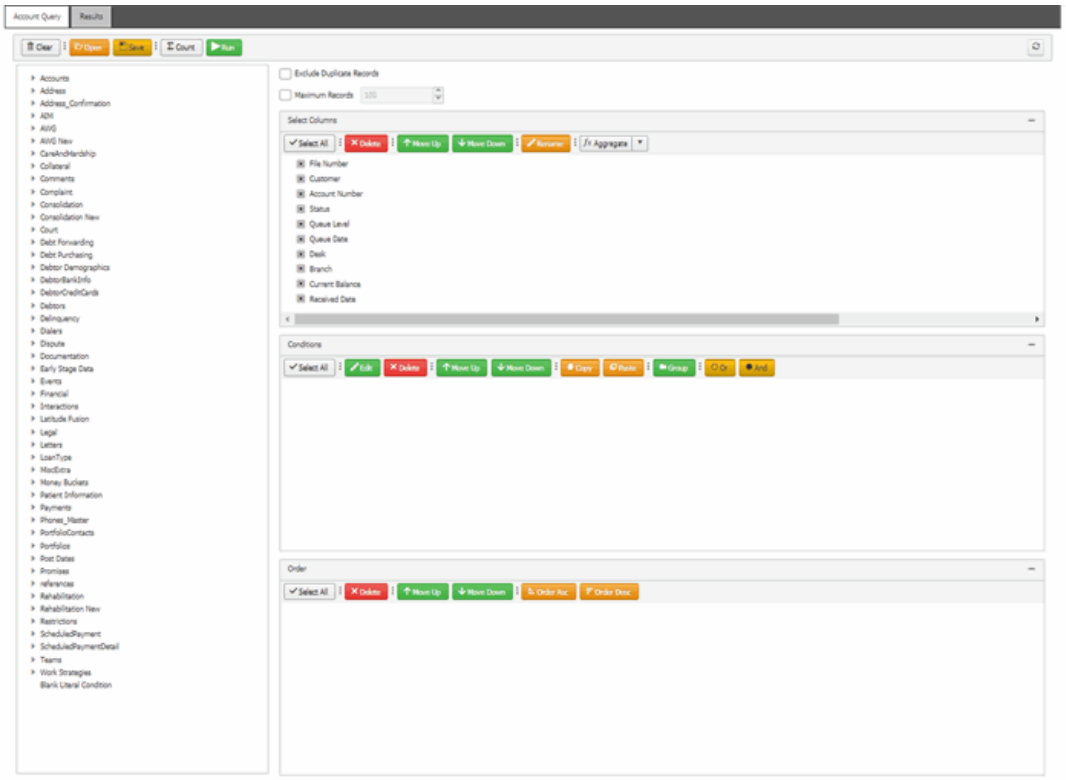
Feedback

Filter Query Results

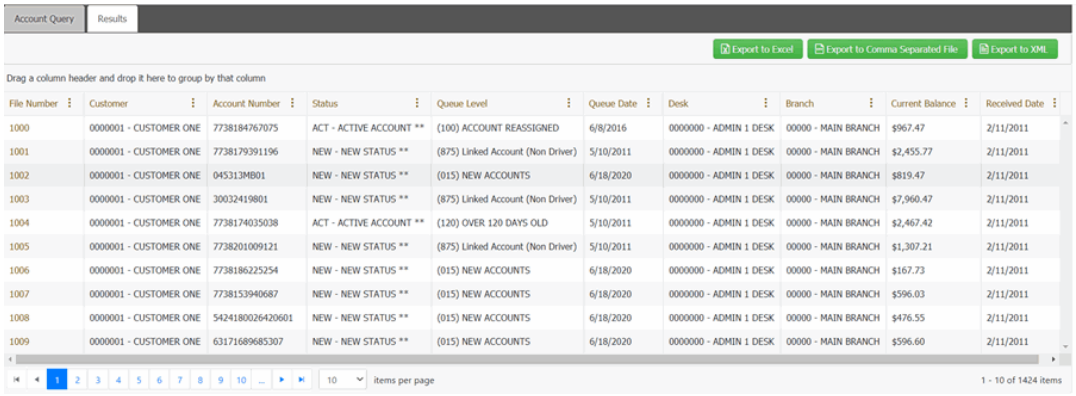
Use the **Results** tab on the **Account Analysis** page to filter query results. For more information about custom filter operators, see Set Custom Filter Criteria.

To filter query results

1. Ensure that a query is open on the **Account Analysis** page.

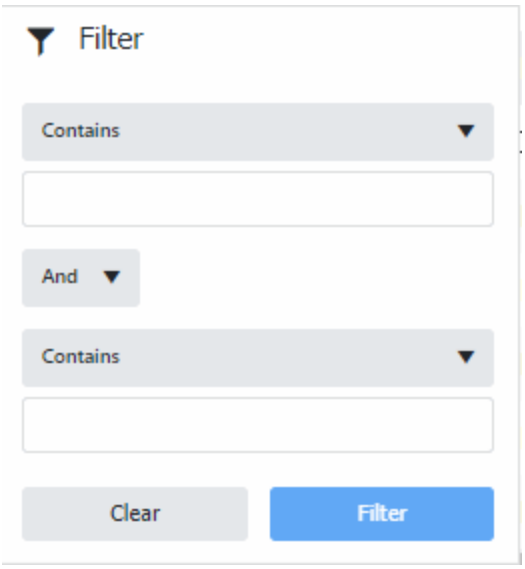


2. In the toolbar, click **Run**. The results appear on the **Results** tab.



3. In the column header, click the column menu and then click **Filter**.

4. To filter the columns, do the following:



a. Select the required option from the **Contains** list and then type the filtering criteria. You can type more than one criteria and apply **And/Or** clause to combine them.

b. Click **Filter**.

Related Topics

Custom Filter Operators

Query Results

Create an Account Analysis Query

Modify an Account Analysis Query

Account Analysis

Feedback

Custom Filter Operators

The following table describes the operators that are available when setting custom filter criteria for query results. The operators available for a data item are based on the item's data type.

Operator	Description
Is equal to	Include accounts in the query results where the data matches the specified value.
Is not equal to	Include accounts in the query results where the data does not match the specified value.
Contains	Includes accounts in the query results where data contains the specified character or characters. This operator is for alphanumeric data types only.
Does not contain	Includes accounts in the query results where data does not contain the specified character or characters. This operator is for alphanumeric data types only.

Starts with	Includes accounts in the query results where data starts with the specified character or characters. This operator is for alphanumeric data types only.
Ends with	Includes accounts in the query results where data ends with the specified character or characters. This operator is for alphanumeric data types only.
Is null	Includes accounts in the query results where the data contains no value.
Is not null	Includes accounts in the query results where the data contains any value.
Is empty	Includes accounts in the query results where the data is empty.
Is not empty	Includes accounts in the query results where the data is not empty.

Related Topics

Filter Query Results

Query Results

Create an Account Analysis Query

Modify an Account Analysis Query

Account Analysis

System Administration

Feedback

System Administration

Administrators, managers, and supervisors can configure system codes, settings, permissions, and policies to customize the Latitude suite of products according to your organization's preferences.

Related Topics

Permissions and Policies

Administration Settings

Application Settings

Configuration Settings

Management Tool Settings

Security Settings

System Codes and Settings

Feedback

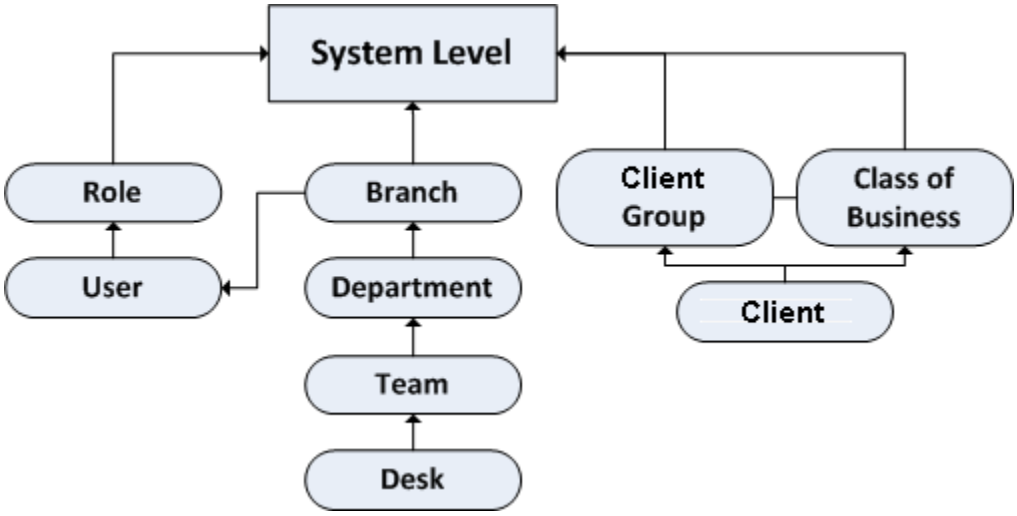
Permissions and Policies

Permissions grant users the authority to use program features and policies define the limitations of permissions. For example, you can set a permission to allow a user to add a post-dated check (PDC) transaction for an Automated Clearing House (ACH) payment. You can then set a policy indicating that the user cannot add transactions that are less than $20.

It's possible for Latitude to apply permissions and policies differently, based on the user or other criteria. Latitude uses a tier (scope) method to create permission and policy layers. So, permissions and policies applied at the base (system) level apply to other scopes, unless an administrator modifies the particular permission and policy. For example, a system-level permission applies to all roles, unless an administrator customizes the permission for the role. Likewise, permissions applied at the role level apply to all users assigned to the role, unless an administrator customizes the permission for an individual user.

Scopes

There are 10 scopes in the permissions and policy structure, split into 4 categories: system, user, desk, and client. These scopes create a hierarchical tree that extends back to the system level. The following diagram shows each scope within its hierarchical structure.



Scopes available for each permission vary. Latitude determines which permissions to use by following hierarchy lines. For example, if a permission doesn't apply at the user scope, Latitude checks the role scope. If it doesn't apply at the role scope, Latitude checks the system scope. It's also possible to check permissions for both a particular user and a particular client. For example, if the user can add post-dated checks, but the client on the account does not permit post-dated checks, the user cannot add post-dated checks for that particular client.

Latitude checks branch permissions based on the user's assigned branch, along with the branch permissions for the user's assigned desk. Latitude merges these permissions and their settings when all of the following occurs:

- An administrator assigns the user to a desk and a branch not associated to that desk.
- An administrator configures the same permission for the user's branch and the desk's branch.

Policies take the permissions one step further. For example, the user-level and client-level permissions allow post-dated checks. At the user level, the permission stipulates that the minimum check amount is $5.00 and the maximum number of days that a user can post-date a check is 30. The permission understands that with the minimum amount a higher number is more restrictive, while with the maximum number of days the lower amount is more restrictive. Latitude considers this logic when creating the intersection for the effective permission. The user can add a post-dated check that is at least $15.00 and within 30 days (unless the administrator doesn't configure the user to observe client rules).

These scenarios can become complicated. To determine the exact policy for the user and client combination, run the Resultant Set of Policies Wizard.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

System Administration

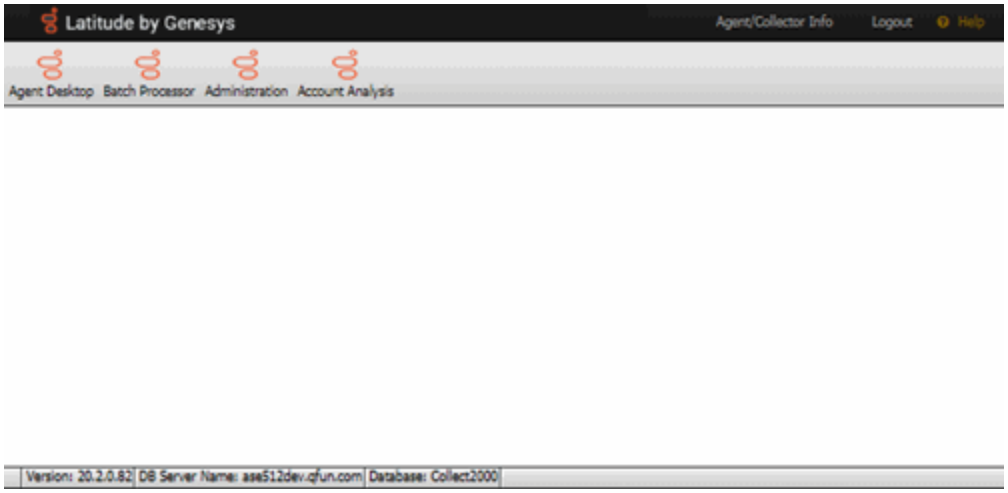
Feedback

Search for a Permission or System Code

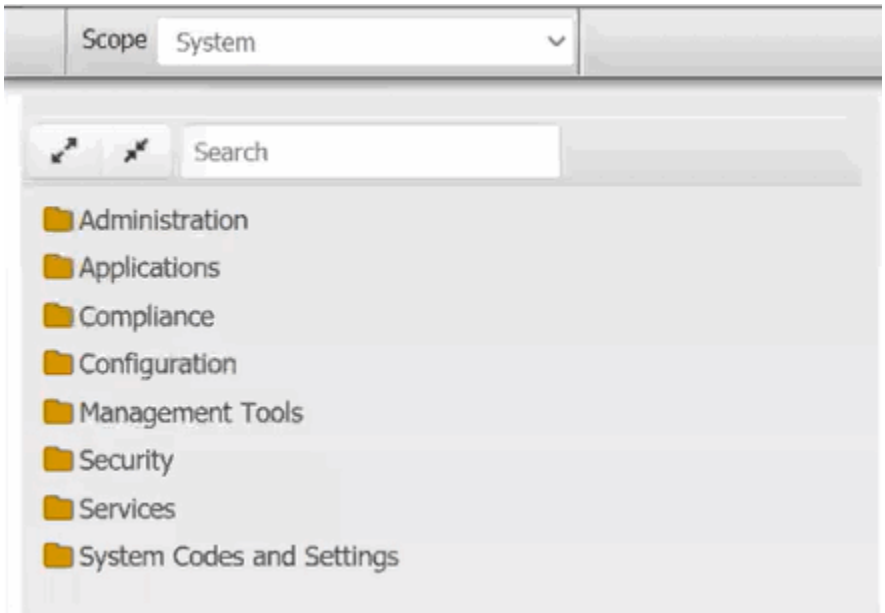
Use the **Administration** page to search for a permission or system code.

To search for a permission or system code

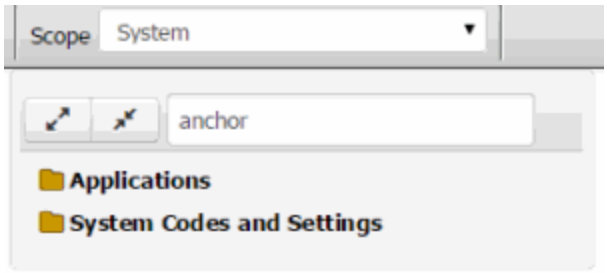
1. Open the **Latitude by Genesys** page.



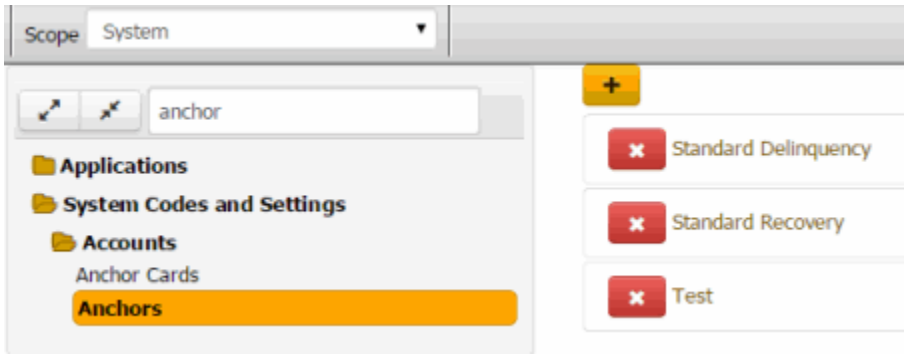
2. In the menu bar, click **Administration**.



3. In the **Search** box, type the full or partial name of the permission or scope and then press **Enter**. The system displays only the folders that contain items that match your search criteria.



4. In the **Navigation** pane, expand a folder and then click an item to view it.



5. To clear the search criteria, delete the content in the **Search** box.

Related Topics

Set a Permission and Policy

Permissions and Policies

System Codes and Settings

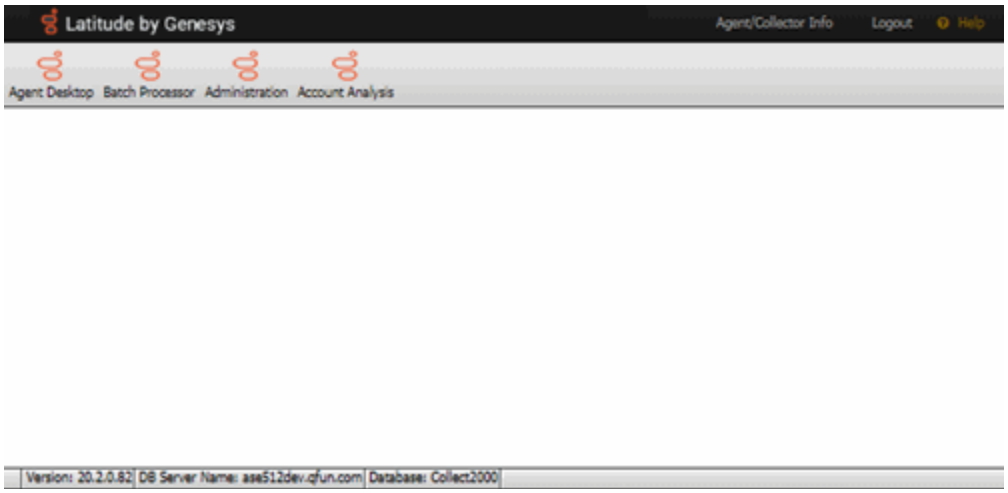
Feedback

Set a Permission and Policy

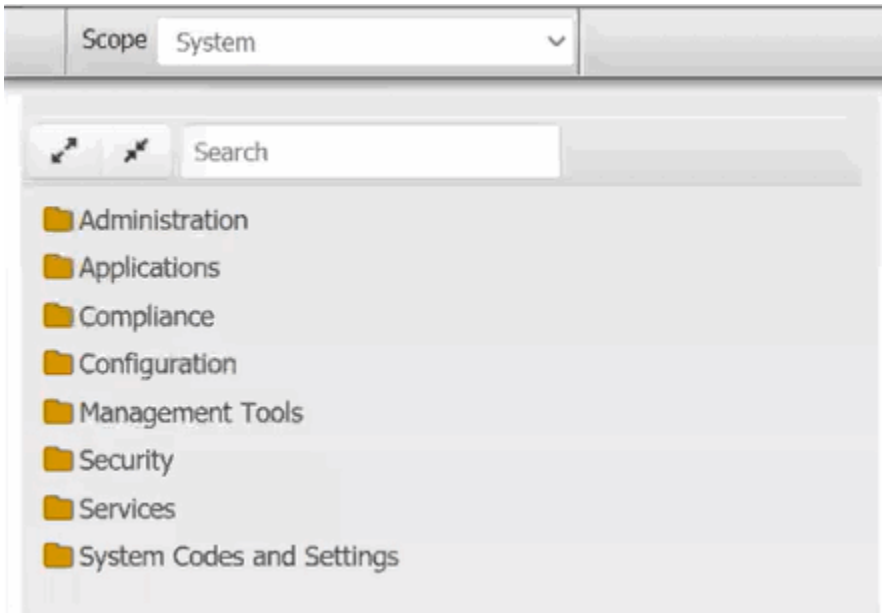
Use the **Administration** page to set permissions and policies for a scope. For more information about scopes and individual permissions and policies, see Permissions and Policies.

To set a permission and policy

1. Open the **Latitude by Genesys** page.



2. In the menu bar, click **Administration**.



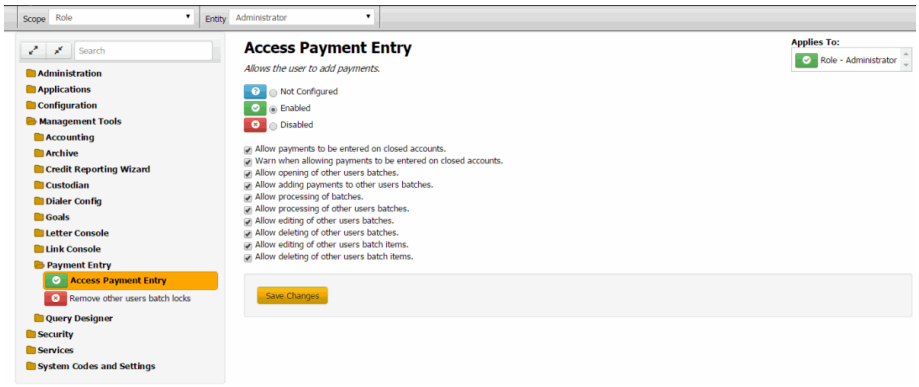
3. In the **Navigation** pane, do one of the following:

a. Expand one or more folders to locate the permission.

> **Tip:** To expand all the folders and sub-folders, click the Expand Tree icon next to the **Search** box. To collapse all the folders and sub-folders, click the Collapse Tree icon next to the **Search** box.

b. Do the steps to Search for a Permission or System Code.

4. In the **Navigation** pane, click a permission. The panel for the selected permission appears. The following example shows the Access Payment Entry permission for the Administrator role.



Scope: Scope level at which to apply the permission (for example, system, role, user, branch). If a permission isn't available for a scope, the system displays a message.

Entity: Entity within the scope to which to apply the permission.

Expand Tree icon: Expands all folders and sub-folders.

Collapse Tree icon: Collapses all folders and sub-folders.

Search: Allows you to search for a permission.

Not Configured: Your organization didn't configure the permission at the selected scope and entity level. The selected scope and entity level can inherit the settings from a higher level.

Enabled: Permission applies at the selected scope and entity level.

Disabled: Permission doesn't apply at the selected scope and entity level, regardless of how it's configured at a higher level.

Policy: Rules to apply to the permission. In the example, the check boxes represent the policy. Not all permissions have policies.

Applies to: Scope and entity to which the permission selected in the **Navigation** tree applies.

5. In the toolbar, specify the scope and entity for the permission.
6. In the permission pane, select a configuration option (Not Configured, Enabled, or Disabled) for the selected scope and entity.
7. If there is a policy associated to the permission, configure the policy.

Note: Policies adhere to the strictest setting when combined. For example, you can set the PDC minimum amount higher for a role scope, and set it lower for a customer scope. Latitude follows the most restrictive setting, which is the lower amount set at the customer level.

8. Click **Save Changes**.

Related Topics

Search for a Permission or System Code

Permissions and Policies

Administration Settings

Feedback

Administration Settings

Use administration settings to specify permissions and policies for system control, system codes, users, roles, and permissions and policies.

Related Topics

Search for a Permission

Set a Permission and Policy

Permissions and Policies

System Configuration Permission

System Codes and Settings Permission

Users, Roles, Permissions and Policies Permission

Feedback

System Configuration Permission

Use the System Configuration permission to specify whether users can maintain Latitude configuration settings, such as your organization's name and contact information.

Location

In the **Navigation** pane, click **Administration** > **System Configuration**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

System Configuration

Administration Settings

Permissions and Policies

Feedback

System Codes and Settings Permission

Use the System Codes and Settings permission to specify whether users can maintain system codes and settings. If you disable the permission for the role or user scope, the role or user cannot access the System Codes and Settings folder or its sub-folders.

Location

In the **Navigation** pane, click **Administration** > **System Codes and Settings**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

System Codes and Settings

Administration Settings

Permissions and Policies

Feedback

Users, Roles, Permissions, and Policies Permission

Use the Users, Roles, Permissions, and Policies permission to specify whether users can maintain users, roles, permissions, and policies. If you disable the permission for the role or user scope, the role or user cannot open the Administration tool. If your organization hasn't configured this permission, only the Administrator **account** (not an Administrator user) can maintain this information.

Location

In the **Navigation** pane, click **Administration** > **Users, Roles, Permissions, and Policies**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Users

Roles

Permissions and Policies

Administration Settings

Application Settings

Feedback

Application Settings

Use application settings to specify permissions and policies for supplemental programs.

Related Topics

Search for a Permission

Set a Permission and Policy

Permissions and Policies

AIM Settings

Settings for Auxiliary Products Permission

CUBE Server Config Permission

Dashboard Settings

Exchange Settings

Use Fusion Permission

Liquid Latitude Settings

Payment Vendor Gateway Settings

Portfolio Manager Settings

Reporting Console Settings

Service Request Gateway Settings

Web Access Settings

WorkFlow Settings

AIM Settings

AIM Settings

Use the AIM settings to specify permissions and policies for Agency Interface Module (AIM).

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Access Reports Permission

Access Tools Permission

Add/Edit/Delete Account Filters Permission

Add/Edit/Delete Agencies Permission

Add/Edit/Delete Business Rules Permission

Add/Edit/Delete Distribution Templates Permission

Run Actions Permission

Use AIM Permission

View Account Filters Permission

View Agencies Permission

View Business Rules Permission

View Distribution Templates Permission

Application Settings

Permissions and Policies

Feedback

Access Reports Permission

Use the Access Reports permission to specify whether users can display reports in AIM.

Location

In the **Navigation** pane, click **Applications** > **AIM** > **Access Reports**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

AIM Settings

Application Settings

Permissions and Policies

Feedback

Access Tools Permission

Use the Access Tools permission to specify whether users can use the tools in AIM.

Location

In the **Navigation** pane, click **Applications** > **AIM** > **Access Tools**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

AIM Settings

Application Settings

Permissions and Policies

Feedback

Add/Edit/Delete Account Filters Permission

Use the Add/Edit/Delete Account Filters permission to specify whether users can add, modify, and delete account filters in AIM.

Location

In the **Navigation** pane, click **Applications** > **AIM** > **Add/Edit/Delete Account Filters**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

AIM Settings

Application Settings

Permissions and Policies

Feedback

Add/Edit/Delete Agencies Permission

Use the Add/Edit/Delete Agencies permission to specify whether users can add, modify, and delete agencies in AIM.

Location

In the **Navigation** pane, click **Applications** > **AIM** > **Add/Edit/Delete Agencies**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

AIM Settings

Application Settings

Permissions and Policies

Feedback

Add/Edit/Delete Business Rules Permission

Use the Add/Edit/Delete Business Rules permission to specify whether users can add, modify, and delete business rules in AIM.

Location

In the **Navigation** pane, click **Applications** > **AIM** > **Add/Edit/Delete Business Rules**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

AIM Settings

Application Settings

Permissions and Policies

Feedback

Add/Edit/Delete Distribution Templates Permission

Use the Add/Edit/Delete Distribution Templates permission to specify whether users can add, modify, and delete distribution templates in AIM.

Location

In the **Navigation** pane, click **Applications** > **AIM** > **Add/Edit/Delete Distribution Templates**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

AIM Settings

Application Settings

Permissions and Policies

Feedback

Run Actions Permission

Use the Run Actions permission to specify whether users can create placements, final recalls, and pending recalls in AIM. Also allows the user to import and export files.

Location

In the **Navigation** pane, click **Applications** > **AIM** > **Run Actions**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

AIM Settings

Application Settings

Permissions and Policies

Feedback

Use AIM Permission

Use the Use AIM permission to specify whether users can open AIM.

Location

In the **Navigation** pane, click **Applications** > **AIM** > **Use AIM**.

Scope

This permission is available for the following scopes:

- System
- Role

- User
- Branch

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

AIM Settings

Application Settings

Permissions and Policies

Feedback

View Account Filters Permission

Use the View Account Filters permission to specify whether users can view account filters in AIM.

Location

In the **Navigation** pane, click **Applications** > **AIM** > **View Account Filters**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

AIM Settings

Application Settings

Permissions and Policies

Feedback

View Agencies Permission

Use the View Agencies permission to specify whether users can view agencies in AIM.

Location

In the **Navigation** pane, click **Applications** > **AIM** > **View Agencies**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

AIM Settings

Application Settings

Permissions and Policies

Feedback

View Business Rules Permission

Use the View Business Rules permission to specify whether users can view business rules in AIM.

Location

In the **Navigation** pane, click **Applications** > **AIM** > **View Business Rules**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

AIM Settings

Application Settings

Permissions and Policies

Feedback

View Distribution Templates Permission

Use the View Distribution Templates permission to specify whether users can view distribution templates in AIM.

Location

In the **Navigation** pane, click **Applications** > **AIM** > **View Distribution Templates**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

AIM Settings

Application Settings

Permissions and Policies

Feedback

Settings for Auxiliary Products Permission

Use the Settings for Auxiliary Products permission to specify settings to allow Exchange, AIM, AIM Receiver, and Job Manager to create payments in Latitude.

Location

In the **Navigation** pane, click **Applications** > **Auxiliary Products** >**Settings for Auxiliary Products**.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify the URL and API key that allow Exchange, AIM, AIM Receiver, and Job Manager to create payments. Enable the permission for a scope and then specify the settings.

URL for Processing Financial Transactions Through Collector: URL to display the Batch Processor in Latitude.

API Key for Collector: API key for using the Latitude Web Service.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Application Settings

Permissions and Policies

CUBE Server Config Permission

Use the Server Config permission to specify settings for Latitude CUBE, which is an online data warehouse that provides multidimensional views into transaction-level data for improved data mining**.**

Location

In the **Navigation** pane, click **Applications** > **Cube** > **Server Config Policy**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Department
- Team
- Desk

Policy

The policy allows your organization to specify the settings for the Latitude CUBE. Enable the permission for a scope and then specify the settings.

Server for the location of the InteractionCollector.Cube: Path to the SQL Analysis Services Server (SSAS) where your organization installed the Latitude CUBE. You can use the Windows server name, IP address, local host, or a named instance.

Analysis Services Database name of the InteractionCollector.Cube: Name of the SQL Analysis Services database that contains the Latitude CUBE. The default name is InteractionCollector.Cube.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Application Settings

Permissions and Policies

Dashboard Settings

Dashboard Settings

Use the Dashboard settings to specify permissions and policies for Dashboard.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Manage Dashboards Permission

View Dashboards Permission

Application Settings

Permissions and Policies

Manage Dashboards Permission

Use the Manage Dashboards permission to specify whether users can view, create, and modify the dashboards in Dashboard.

Location

In the **Navigation** pane, click **Applications** > **Dashboard** > **Manage Dashboards**.

Scope

This permission is available for the following scopes:

- System

- Role
- User
- Branch
- Department
- Team
- Desk

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Dashboard Settings

Application Settings

Permissions and Policies

Feedback

View Dashboards Permission

Use the View Dashboards permission to specify which dashboards a user can view and the default dashboard to display when a user logs on to Dashboard.

Location

In the **Navigation** pane, click **Applications** > **Dashboard** > **View Dashboards**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Department
- Team
- Desk

Policy

The policy allows your organization to specify the default dashboard to display and which dashboards users can view. Enable the permission for a scope and then select the dashboards.

Home Dashboard: Default dashboard to display when the user logs on to Dashboard.

View Dashboards: If you selected a dashboard, it displays when users log on to Dashboard.

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Dashboard Settings

Application Settings

Permissions and Policies

Exchange Settings

Exchange Settings

Use the Exchange settings to specify permissions and policies for Exchange Manager.

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Modify Client Configuration Permission

Use Exchange Permission

Application Settings

Permissions and Policies

Modify Client Configuration Permission

Use the Modify Client Configuration permission to specify whether users can modify configuration items in Exchange Manager.

Location

In the **Navigation** pane, click **Applications** > **Exchange** > **Modify Client Configuration**.

Scope

This permission is available for the following scopes:

- System
- Role

- User
- Branch

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Exchange Settings

Application Settings

Permissions and Policies

Feedback

Use Exchange Permission

Use the Use Exchange permission to specify whether users can open Exchange Manager.

Location

In the **Navigation** pane, click **Applications** > **Exchange** > **Use Exchange**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Exchange Settings

Application Settings

Permissions and Policies

Feedback

Use Fusion Permission

Use the Use Fusion permission to specify whether users can open Fusion.

Location

In the **Navigation** pane, click **Applications** > **Fusion** > **Use Fusion**.

Scope

This permission is available for the all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Application Settings

Permissions and Policies

Liquid Latitude Settings

Feedback

Liquid Latitude Settings

Use the Liquid Latitude settings to specify permissions and policies for Latitude.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Access Accounts Settings

Account Actions Settings

Account Data Settings

Applicable Processes and Stages Permission

Enable Server Caching of Permissions

Work Form Settings

Application Settings

Permissions and Policies

Access Accounts Settings

Feedback

Access Accounts Settings

Use the Access Accounts settings to specify permissions and policies for viewing and working accounts.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Access Account Permission

Access Accounts in Another Desk Permission

Access AIM Assigned Account Permission

Access Archived Account Permission

Access Outside Branch Permission

Access Restricted Access Accounts Permission

Access Returned Account Permission

Configure Data Protection Validation Instructions Permission

Access Reopen Account Permission

Access Unreturn Account Permission

Queues Settings

Require Data Protection Validation Permission

Search Permission

User Restrictions by Conditions Permission

View Other User Payments Permission

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Access Account Permission

Use the Access Account permission to specify whether users can view or work accounts. A user who doesn't have this permission can search for an account but cannot view it.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Access Accounts** > **Access Account**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Access Accounts Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Access Accounts in Another Desk Permission

Use the Access Accounts in Another Desk permission to specify whether users can view or work accounts assigned to another user's desk.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Access Accounts** > **Access Accounts in Another Desk**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Access Accounts Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Access AIM Assigned Account Permission

Use the Access AIM Assigned Account permission to specify whether users can view or work an account assigned to an outside collection agency or attorney. A user who doesn't have this permission can search for an AIM account but cannot view it.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Access Accounts** > **Access AIM Assigned Account**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Access Accounts Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Access Archived Account Permission

Use the Access Archived Account permission to specify whether users can view archived accounts. A user who doesn't have this permission can search for an archived account but cannot view it. This permission is not related to the user's permissions to archive or restore accounts.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Access Accounts** > **Access Archived Account**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Access Accounts Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Access Outside Branch Permission

Use the Access Outside Branch permission to specify whether users can view accounts not assigned to a desk within the user's assigned branch.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Access Accounts** > **Access Outside Branch**.

Scope

This permission is available for all scopes.

Policy

This policy allows your organization to specify the "**outside**" branches for which users can and cannot view accounts. Enable the permission for a scope and then specify the settings.

Restrict access to specific branches: If selected, allows the user to view accounts for the user's own branch and the selected branches only. If cleared, allows the user to view accounts for all branches.

Branches: If selected AND you selected the Restrict access to specific branches check box, the user can view accounts for that branch. If cleared AND you selected the Restrict access to specific branches check box, the user cannot view accounts for that branch. If you didn't select the Restrict access to specific branches check box, the user can view accounts for all branches.

If you add a branch after setting the policy, update the policy to include or exclude the new branch.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Access Accounts Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Access Restricted Access Accounts Permission

Use the Access Restricted Access Accounts permission to specify whether users can view accounts that have restrictions. This permission is unavailable currently.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Access Accounts** > **Access Restricted Access Accounts**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Access Accounts Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Access Returned Account Permission

Use the Access Returned Account permission to specify whether users can view accounts flagged as returned to the client (queue level 999).

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Access Accounts** > **Access Returned Account**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Access Accounts Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Configure Data Protection Validation Instructions Permission

Use the Configure Data Protection Validation Instructions permission to specify the instructions to display in the **DPA Validation** dialog box for validating a call.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Access Accounts** > **Configure Data Protection Validation Instructions**.

Scope

This permission is available for the following scopes:

- System
- Business Class
- Client Group
- Client

Policy

The policy allows you to specify the instructions for validating a call. Enable the permission for a scope and then specify the criteria.

Data Validation Instructions: Instructions to users on how to verify that they are speaking to the correct customer or authorized third party before discussing an account.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Validate a Call

Access Accounts Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Access Reopen Account Permission

Use the Access Reopen Account permission to specify whether users can view accounts flagged as reopen to the client (queue level 999).

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Access Accounts** > **Reopen Account**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Reinstate an Account

Search for a Permission or System Code

Set a Permission and Policy

Access Accounts Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Access Unreturn Account Permission

Use the Access Unreturn an Account permission to specify whether users can view accounts flagged as unreturn to the client (queue level 999).

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Access Accounts** > **Unreturn Account**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Unreturn an Account

Search for a Permission or System Code

Set a Permission and Policy

Access Accounts Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Queues Settings

Queues Settings

Use the Queues settings to specify permissions and policies for work queues.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Change Continue Queuing Setting Permission

Custom Queue Options Permission

Queue Providers Permission

Access Accounts Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Change Continue Queuing Setting Permission

Use the Change Continue Queuing Setting permission to specify whether users can flag an account to include in the Collector queue while it's pending work in a Supervisor or Clerical queue.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Access Accounts** > **Queues** > **Change Continue Queuing Setting**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Work Queues

Queues Settings

Access Accounts Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Custom Queue Options Permission

Use the Custom Queue Options permission to specify the rules to apply to the Custom queue.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Access Accounts** > **Queues** > **Custom Queue Options**.

Scope

This permission is available for the following scopes:

- System

- Role
- User
- Branch

Policy

The policy allows your organization to specify the rules to apply to the Custom queue. Enable the permission for a scope and specify the settings.

Enforce collector queueing rules: If selected, prevents queueing of accounts assigned to a queue level that doesn't queue, should not queue, or a user contacted the accounts on the current date.

Enforce time zone rules: If selected, prevents queueing of accounts that are not in a callable time zone based on the state and postal code associated to the account.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Open the Custom Queue

Queues Settings

Access Accounts Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Queue Providers Permission

Use the Queue Providers permission to specify the queues that are available to the user. For more information, see Work Queues.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Access Accounts** > **Queues** > **Queue Providers**.

Scope

This permission is available for all scopes:

- System
- Role
- User
- Branch

Policy

The policy allows your organization to specify the queues that are available to users. Enable the permission for a scope and then specify the queues. If you select a queue, it's available to users.

Select None: Clears all selected items in the list.

Select All: Selects all items in the list.

> **Tip**: To select multiple sequential queues, press and hold the **Shift** key and then click the first and last sequential queue. To select multiple non-sequential queues, press and hold the **Ctrl** key and then click each individual queue.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Work Queues

Queues Settings

Access Accounts Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Require Data Protection Validation Permission

Use the Require Data Protection Validation permission to specify whether to display a dialog box containing information for validating a caller before displaying the account.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Access Accounts** > **Require Data Protection Validation**.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Validate a Call

Access Accounts Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Search Permission

Use the Search permission to specify settings for searching for accounts.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Access Accounts** > **Search** > **Search**.

Scope

This permission is available for all scopes.

Policy

The policy allows you to specify settings for searching for accounts. Enable the permission for a scope and then specify the criteria.

Default Quick Search Field: Default criteria available to the user when searching for an account using the "quick search" feature.

Search Fields: If you select a field, it displays on the **Simple** tab in the **Search Accounts** panel.

Search Result Fields: If you select a field, it displays on the **Results** tab in the **Search Accounts** panel.

Select None: Clears all selected items in the list.

Select All: Selects all items in the list.

> **Tip**: To select multiple sequential fields, press and hold the **Shift** key and then click the first and last sequential field. To select multiple non-sequential fields, press and hold the **Ctrl** key and then click each individual field.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Search

Access Accounts Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

View Other User Payments Permission

Use the View Other User Payments permission to specify whether users can view payments that other users processed. For more information, see View Applied and Planned Payments.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Access Accounts** > **View Other User Payments**.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Access Accounts Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Account Actions Settings

Account Actions Settings

Use the Account Actions settings to specify permissions and policies for the actions users can take on accounts.

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Access Redirect Portal Permission

AIM Place/Recall Functionality Permission

Allow Creation of Holds Permission

Allow Manual Linking/Unlinking Permission

Allow Start/Stop Interest Permission

Auto Close Account Permission

Change Desk Permission

Change Status Permission

Require Note on Account Permission

Set Follow-up Date Permission

Set Reminders for Others Permission

Liquid Latitude Settings

Application Settings

Permissions and Policies

My Desk Assignment Permission

Feedback

Access Redirect Portal Permission

Use the Access Redirect Portal permission to specify the web site to open in a new browser tab when a user clicks the link on the account toolbar. No data passes from Latitude to this web site. For more information, see Display a Web Site on a New Browser Tab.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Actions** > **Access Redirect Portal**.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

The policy allows you to specify the web site to display on a new tab in your browser. Enable the permission for a scope and then specify the URL.

URL: Address of the web site to display on a new browser tab.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Display a Web Site in a New Browser Instance

Account Actions Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Allow Account Creation Manually

Allow users to create Account Manually.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Actions** > **Allow Account Creation Manually**

Scope

This permission is available for the following scopes:

- System

Policy

Default Account Status: Users can also select a default status code for the new account, if nothing is selected the status of the account will be NEW.

AIM Place/Recall Functionality Permission

Use the AIM Place/Recall Functionality permission to specify whether users can place an account with an outside collection agency or attorney, and recall the placed account. For more information, see Placements and Recalls.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Actions** > **AIM Place/Recall Functionality**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Placements and Recalls

Account Actions Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Allow Creation of Holds Permission

Use the Allow Creation of Holds permission to specify whether users can place collection holds at the account and customer levels. For more information, see Collection Holds.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Actions** > **Allow Creation of Holds**.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Placements and Recalls

Account Actions Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Allow Manual Linking/Unlinking Permission

Use the Allow Manual Linking/Unlinking permission to specify whether users can link and unlink accounts manually. For more information, see Add a Link to an Account and Remove all Links to an Account.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Actions** > **Allow Manual Linking/Unlinking**.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Placements and Recalls

Account Actions Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Allow Start/Stop Interest Permission

Use the Allow Start/Stop Interest permission to specify whether users can start and stop client interest on accounts. For more information, see Manage Interest.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Actions** > **Allow Start/Stop Interest**.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Placements and Recalls

Account Actions Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Auto Close Account Permission

Use the Auto Close Account permission to specify whether users can have the system close an interaction automatically under the following conditions:

- User searches for and selects an account using the Search Accounts or Quick Search feature.
- User moves to the next account in the work queue when working accounts in a queue.
- User closes the work queue when working accounts in a queue.
- User selects another account from inventory.
- User selects another account from account history.

For more information, see Open Interactions.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Actions** > **Auto Close Account**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Account Actions Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Change Desk Permission

Use the Change Desk permission to specify whether users can assign an account to another desk. For more information, see Change a Desk Assignment.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Actions** > **Change Desk**.

Scope

This permission is available for all scopes.

Policy

The policy allows your organization to specify which desks users can move accounts from and indicate desks to which they can reassign accounts. Enable the permission for a scope and then specify the settings.

Restrict the desk from which the user may move the account: If selected, your organization restricts the desks a user can move an account from.

Restrict Desks: Indicates whether the user can move accounts assigned to the specified desks. Valid values are:

- **Allow moving accounts from the following desks:** The user can move accounts from the specified desks.
- **Deny moving accounts from the following desks:** The user cannot move accounts from the specified desks.

Desks: If you selected a desk and the **Allow moving accounts from the following desks** option, users can move accounts from that desk. If you selected a desk and the **Deny moving accounts from the following desks** option, users cannot move accounts from that desk.

Restrict the desk to which the user may move the account: If selected, your organization restricts the desks a user can move an account to.

Restrict Desks: Indicates whether the user can move accounts to the specified desks. Valid values are:

- **Allow moving accounts to the following desks:** The user can move accounts to one of the specified desks.
- **Deny moving accounts to the following desks:** The user cannot move accounts to one of the specified desks.

Desks: If you selected a desk and the **Allow moving accounts to the following desks** option, users can move accounts to that desk. If you selected a desk and the **Deny moving accounts to the following desks** option, users cannot move accounts to that desk.

Select None: Clears all selected items in the list.

Select All: Selects all items in the list.

> **Tip**: To select multiple sequential desks, press and hold the **Shift** key and then click the first and last sequential desk. To select multiple non-sequential desks, press and hold the **Ctrl** key and then click each individual desk.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Change a Desk Assignment

Account Actions Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Change Status Permission

Use the Change Status permission to specify whether users can modify the status code assigned to an account. For more information, see Statuses.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Actions** > **Change Status**.

Scope

This permission is available for all scopes.

Policy

The policy allows your organization to specify which account statuses users can and cannot modify. Enable the permission for a scope and then specify the restrictions.

Restrict the status from which the user may change the account: If selected, your organization restricts the statuses a user can change an account from.

Restrict Statuses: Indicates whether the user can change the status for accounts in the specified statuses. Valid values are:

- **Allow changing accounts from the following statuses:** The user can change the status of accounts in one of the specified statuses.
- **Deny changing accounts from the following statuses:** The user cannot change the status of accounts in one of the specified statuses.

Statuses: If you select a status and the **Allow changing accounts from the following statuses** option, users can change the status of accounts in that status. If you select a status and the **Deny changing accounts from the following statuses** option, users cannot change the status of accounts in that status. For example, you can indicate whether the user can or cannot change the status of accounts that have a "pending" status to some other status.

Restrict the status to which the user may change the account: If selected, your organization restricts the statuses a user can change an account to.

Restrict Statuses: Indicates whether the user can change account statuses to the specified statuses. Valid values are:

- **Allow changing accounts to the following statuses:** The user can change the status of accounts to one of the specified statuses.
- **Deny changing accounts to the following statuses:** The user cannot change the status of accounts to one of the specified statuses.

Statuses: If you select a status and the **Allow changing accounts to the following statuses** option, users can change the status of accounts to that status. If you select a status and the **Deny changing accounts to the following statuses** option, users cannot change the status of accounts to that status. For example, you can indicate whether the user can or cannot change accounts to a "pending" status.

Select None: Clears all selected items in the list.

Select All: Selects all items in the list.

> **Tip**: To select multiple sequential statuses, press and hold the **Shift** key and then click the first and last sequential status. To select multiple non-sequential statuses, press and hold the **Ctrl** key and then click each individual status.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Change an Account Status

Account Actions Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

My Desk Assignment Permission

Use the My Desk Assignment permission to specify whether users can reassign an account to their own desk. For more information, see Reassign an Account to Your Desk

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Actions**> **My Desk Assignment**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Queue and Desk Assignments

Require Note on Account Permission

Use the Require Note on Account permission to specify whether your organization requires the user to add a note to accounts before moving to another account in the Collector queue.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Actions** > **Require Note on Account**.

Scope

This permission is available for all scopes.

Policy

The policy allows you to specify whether users must add notes containing action or result codes that meet specific criteria before moving to the next account in the Collector queue. Enable the permission for a scope and then specify the settings.

Require a note with an action or result code that is considered as worked: If selected, the user cannot continue in the queue until adding a note with an action or result code signifying a worked account.

Require a note with an action code that is considered as attempted: If selected, the user cannot continue in the queue until adding a note with an action code signifying an attempted contact.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Work Queues

Account Actions Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Set Follow-up Date Permission

Use the Set Follow-up Date permission to specify whether users can set follow-up dates on accounts. For more information, see Set an Account Follow-up Date.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Actions** > **Set Follow-up Date**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Set an Account Follow-up Date

Account Actions Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Set Reminders for Others Permission

Use the Set Reminders for Others permission to specify whether users can set a reminder for accounts assigned to another desk. For more information, see Set a Timed Reminder.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Actions** > **Set Reminders**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Set a Timed Reminder

Account Actions Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Account Data Settings

Account Data Settings

Use the Account Data settings to specify permissions and policies for account data.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Allow RDN Case Creation and Updates Permission

Allow Collateral Editing Permission

Bankruptcy Permission

Care and Financial Hardship Panel Permission

Complaints Panel Permission

Credit Reporting Settings

Disputes Panel Permission

Deceased Permission

Documentation Settings

Extra Data Settings

Fusion Services - Verify Responses Permission

Income and Expenditure Settings

Labels - User Policy Permission

Legal Settings

Letters Settings

Misc Extra Data Settings

Name Template Config Permission

Notes Settings

Parties Settings

Phones Settings

Scheduled Payments Settings

Update User Date 1 Permission

Update User Date 2 Permission

Update User Date 3 Permission

Warnings Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Allow Collateral Editing Permission

Use the Allow Collateral Editing permission to specify whether users can modify automotive and non-automotive collateral information on the **Collateral** panel. For more information, see Collateral.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Collateral** > **Allow Collateral Editing**.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Collateral

Account Data Settings

Application Settings

Permissions and Policies

Bankruptcy Permission

Use the Bankruptcy permission to specify whether users can modify or delete Bankruptcy data. For more information, see Bankruptcy.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data**> **Bankruptcy** > **Bankruptcy Config**.

Scope

This permission is available for all scopes.

Policy

The policy allows your organization to configure the bankruptcy data. Enable the permission for a scope and then specify the settings.

Allow Modification of Bankruptcy Data: If selected, users can modify bankruptcy data.

Allow Deletion of Bankruptcy Data: If selected, users can delete bankruptcy data.

Related Topics

Bankruptcy

Search for a Permission or System Code

Set a Permission and Policy

Permissions and Policies

Feedback

Care and Financial Hardship Panel Permission

Use the Care and Financial Hardship Panel permission to configure the **Care and Financial Hardship** panel. For more information, see Care and Financial Hardship.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Care and Financial Hardship** > **Care and Financial Hardship Panel Config**.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

The policy allows your organization to configure the **Care and Financial Hardship** panel. Enable the permission for a scope and then specify the settings.

View Care Types: If selected, users can view care types.

Edit Care: If selected, users can modify care information.

Approve Hold Days: If selected, users can approve the number of days to place the account on hold to suspend collection activity.

Override Hold Days: If selected, users can override the default number of days to place the account on hold to suspend collection activity.

Edit the Care and Financial Hardship Comment: If selected, users can add or modify comments regarding a care or financial hardship case.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Care and Financial Hardship

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Complaints Panel Permission

Use the Complaints Panel permission to configure the **Complaints** panel. For more information, see Complaints.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Complaints** > **Complaints Panel Config**.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

The policy allows your organization to configure the **Complaints** panel. Enable the permission for a scope and then specify the settings.

Close Complaint: If selected, users can close complaints.

Reopen Complaint: If selected, users can reopen complaints.

Edit Compensation Amount: If selected, users can specify the compensation amount.

View Compensation Amount: If selected, users can view the compensation amount.

View Complaint Outcome: If selected, users can view the outcome of a complaint.

View Complaint Details: If selected, users can view details about a complaint.

Assign Complaint Owner: If selected, users can assign an owner to the complaint.

Assign and Edit Department: If selected, users can assign a department to the complaint.

Assign and Edit Complaint Category: If selected, users can assign a category to the complaint.

Edit Complaint Against: If selected, users can specify who the complaint is against.

Edit Referred by: If selected, users can specify who referred the customer.

Edit Investigation to Date: If selected, users can modify the details of the investigation.

Edit Conclusion: If selected, users can modify the complaint conclusion.

Edit Complaint Justified: If selected, users can specify whether the complaint is justified.

Edit Complaint Outcome: If selected, users can specify the outcome of the complaint.

Enable Existing Complaint Button: If selected, users can remove a duplicate complaint.

Edit Complaint Status: If selected, users can specify the status of the complaint.

Edit Root Cause: If selected, users can modify the root cause of the complaint.

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Complaints

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Credit Reporting Settings

Credit Reporting Settings

Use the Credit Reporting settings to specify permissions and policies for reporting accounts to credit bureaus.

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Allow Delete Options Permission

Allow Manual Evaluation Permission

Allow Prevent Flag and Undo Delete Permission

Alter Credit Reporting Settings Permission

Utility Tab Permission

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Allow Delete Options Permission

Use the Allow Delete Options permission to specify whether users can delete accounts from credit reporting for reasons such as reported in error, fraud, or account paid by insurance. For more information, see the following topics:

- Send Delete Request for Account Reported in Error
- Send Delete Request for Account Reported Based on Fraud
- Send Delete Request for Medical Account

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Credit Reporting** > **Allow Delete Options.**

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Credit Reporting Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Allow Manual Evaluation Permission

Use the Allow Manual Evaluation permission to specify whether users can run a manual evaluation of an account for credit reporting purposes. For more information, see Evaluate an Account for Credit Reporting.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Credit Reporting** > **Allow Manual Evaluation**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Credit Reporting Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Allow Prevent Flag and Undo Delete Permission

Use the Allow Prevent Flag and Undo Delete permission to specify whether users can undo credit reporting delete requests for the following:

- Accounts reported in error.
- Accounts with a customer who is a victim of fraud.
- Accounts that insurance is paying or paid in full.

For more information, see Undo a Credit Reporting Delete Request.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Credit Reporting** > **Allow Prevent Flag and Undo Delete**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Credit Reporting Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Alter Credit Reporting Settings Permission

Use the Alter Credit Reporting Settings permission to specify whether users can modify credit reporting settings. For more information, see Credit Bureau Reporting.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Credit Reporting** > **Alter Credit Reporting Settings**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Credit Bureau Reporting

Credit Reporting Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Utility Tab Permission

Use the Utility Tab permission to specify whether to display or hide the **Utility** tab on the **CB Reporting** panel. For more information, see Manage Miscellaneous CBR Settings.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Credit Reporting** > **Utility Tab**.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Credit Bureau Reporting

Credit Reporting Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Disputes Panel Permission

Use the Disputes Panel permission to configure the **Disputes** panel. For more information, see Disputes.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Disputes** > **Disputes Panel Config**.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

The policy allows your organization to configure the **Disputes** panel. Enable the permission for a scope and then specify the settings.

Edit Dispute Type: If selected, users can specify the dispute type.

Edit Received Date: If selected, users can specify the dispute received date.

Edit Referred by: If selected, users can specify who referred the customer.

Edit Dispute Details: If selected, users can specify the details of the dispute.

Edit Dispute Category: If selected, users can specify the dispute category.

Edit Dispute Against: If selected, users can specify who the dispute is against.

Edit Dispute Justified: If selected, users can specify whether the dispute is justified.

Edit Dispute Outcome: If selected, users can specify the outcome of the dispute.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Disputes

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Deceased Permission

Use the Deceased permission to specify whether users can modify or delete deceased data. To know more about maintain Deceased information, see Maintain Deceased Information.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data**> **Deceased**> **Deceased Config**.

Scope

This permission is available for all scopes.

Policy

The policy allows your organization to configure the deceased data. Enable the permission for a scope and then specify the settings.

Allow Modification of Deceased Data: If selected, users can modify deceased data.

Allow Deletion of Deceased Data: If selected, users can delete deceased data.

Related Topics

Maintain Deceased Information

Search for a Permission or System Code

Set a Permission and Policy

Account Data Settings

Application Settings

Permissions and Policies

Documentation Settings

Feedback

Documentation Settings

Use the Documentation settings to specify permissions and policies for account documentation.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Attach Documentation Permission

Delete Documentation Permission

View Attached Documents Permission

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Attach Documentation Permission

Use the Attach Documentation permission to specify whether users can attach documentation to accounts. For more information, see Attach a Document to an Account.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Documentation** > **Attach Documentation**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Business Class
- Client Group
- Client

Policy

The policy allows your organization to specify which document categories are available to users when attaching documents to accounts. Enable the permission for a scope and then specify the codes.

Permitted Categories: If you select a documentation category, it's available when users attach documents to accounts. For information about creating documentation categories, see Documentation Categories.

Select None: Clears all selected items in the list.

Select All: Selects all items in the list.

> **Tip**: To select multiple sequential categories, press and hold the **Shift** key and then click the first and last sequential category. To select multiple non-sequential categories, press and hold the **Ctrl** key and then click each individual category.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Attach a Document to an Account

Documentation Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Delete Documentation Permission

Use the Delete Documentation permission to specify whether users can delete documentation attached to accounts. For more information, see Delete a Document From an Account.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Documentation** > **Delete Documentation**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Business Class
- Client Group

- Client

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Delete a Document From an Account

Documentation Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

View Attached Documents Permission

Use the View Attached Documents permission to specify whether users can view documents that are attached to accounts. For more information, see View Documents Attached to an Account.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Documentation** > **View Attached Documents**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Business Class
- Client Group
- Client

Policy

The policy allows your organization to specify which documentation categories are available to users when viewing documents that are attached to accounts. Enable the permission for a scope and then specify the codes.

Permitted Categories: If you select a documentation category, it's available when users view documents attached to accounts. For information about creating documentation categories, see Documentation Categories.

Select None: Clears all selected items in the list.

Select All: Selects all items in the list.

> **Tip**: To select multiple sequential categories, press and hold the **Shift** key and then click the first and last sequential category. To select multiple non-sequential categories, press and hold the **Ctrl** key and then click each individual category.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

View Documents Attached to an Account

Documentation Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Extra Data Settings

Feedback

Extra Data Settings

Use the Extra Data settings to specify permissions and policies for custom data.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Create Extra Data Permission

Update Extra Data Permission

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Create Extra Data Permission

Use the Create Extra Data permission to specify whether users can add custom data. For more information, see Add Extra Data.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Extra Data** > **Create Extra Data**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Add Extra Data

Extra Data Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Update Extra Data Permission

Use the Update Extra Data permission to specify whether users can modify custom data. For more information, see Modify Extra Data.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Extra Data** > **Update Extra Data**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Modify Extra Data

Extra Data Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Fusion Services - Verify Responses Permission

Use the Fusion Services - Verify Responses permission to specify whether users can flag the responses received from outside vendors as verified. For more information, see Verify a Response From an Outside Service Provider.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Fusion Services** > **Verify Responses**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Verify a Response From an Outside Service Provider

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Income and Expenditure Settings

Income and Expenditure Settings

Use the Income and Expenditure settings to specify permissions and policies for income and expenditures.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Maintain Income and Expense items Permission

Trigger Values Permission

Account Data Settings

Permissions and Policies

Feedback

Maintain Income and Expense Items Permission

Use the Maintain Income and Expense Items permission to specify whether users can add and modify income, expenditure, and arrears information in the **Income and Expenditure** panel. For more information, see Income and Expenditures.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Income & Expenditure** > **Maintain Income & Expense Items**.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Income and Expenditures

Income and Expenditure Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Trigger Values Permission

Use the Trigger Values permission to specify the Common Financial Statement trigger values for expenditures. For more information, see Add Expenses.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Income & Expenditure** > **Trigger Values**.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to configure trigger values for income and expenditures. Enable the permission for a scope and then specify the settings.

Specify the trigger values for each category of person: first adult, other adults, children under 14, and children aged 14-18.

Phone: Maximum amount that your organization considers normal for telephone expenses.

Travel: Maximum amount that your organization considers normal for travel expenses. Travel expenses include car tax, insurance, fuel, and other travel expenses such as public transport.

Housekeeping: Maximum amount that your organization considers normal for housekeeping expenses.

Other: Maximum amount that your organization considers normal for other expenses.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Add Expenses

Income and Expenditure Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Labels - User Policy Permission

Use the User Policy permission to specify whether users can create, assign, view, or delete account labels. You can use account labels to flag accounts for your own purpose. For example, you can use account labels as tags, conditions, or properties. For more information, see Account Labels Card.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Labels** > **User Policy**.

Scope

This permission is available for all scopes.

Policy

The policy allows your organization to specify whether users can view, add, associate, and delete account labels. Enable the permission for a scope and then specify the settings.

User can view Labels on Accounts: Allows the user to view the labels associated to accounts.

User can Add an Existing Label to an Account: Allows the user to select an existing label and associate it to an account.

User can Create and Add a Newly Defined Label to an Account: Allows the user to create account labels and add them to accounts.

User can Delete a label from an Account: Allows the user to delete labels from accounts.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Account Labels Card

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Legal Settings

Legal Settings

Use the Legal settings to specify permissions and policies for legal judgments against accounts.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Award/Reverse Judgment Permission

Delete Legal Case Permission

Judgment Award Bucket Mappings Permission

Update Interest Permission

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Award/Reverse Judgment Permission

Use the Award/Reverse Judgment permission to specify whether users can award and reverse judgments on accounts. For more information, see Award a Judgment.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Legal** > **Award/Reverse Judgment**.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Verify a Response From an Outside Service Provider

Legal Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Delete Legal Case Permission

Use the Delete Legal Case permission to specify whether users can delete legal cases. For more information, see Delete a Legal Case.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Legal** > **Delete Legal Case**.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Verify a Response From an Outside Service Provider

Legal Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Judgment Award Bucket Mappings Permission

Use the Judgment Award Bucket Mappings permission to map judgment awards to the money buckets to which to apply the award. For more information, see Award a Judgment.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Legal** > **Judgment Award Bucket Mappings**.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify the money buckets to which to apply judgment awards. Enable the permission for a scope and then specify the settings.

Note: The values in the list boxes are based on money titles that your organization specified in system configuration. For more information, see Maintain Money Titles.

Principal Award: Money bucket in which to store the judgment amount awarded for principal.

Interest Award: Money bucket in which to store the judgment amount awarded for interest.

Court Cost Award: Money bucket in which to store the judgment amount awarded for court costs.

Attorney Cost Award: Money bucket in which to store the judgment amount awarded for attorney costs.

OtherCost1 Award through **OtherCost5 Award:** Money buckets in which to store the judgment amount awarded for other costs.

Miscellaneous Cost Award: Money bucket in which to store the judgment amount awarded for miscellaneous costs.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Account Labels Card

Legal Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Update Interest Permission

Use the Update Interest permission to specify whether users can update interest for the linked accounts in a judgment. For more information, see Update Interest on Linked Accounts in a Judgment.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Legal** > **Update Interest**.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Verify a Response From an Outside Service Provider

Legal Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Letters Settings

Feedback

Letters Settings

Use the Letters settings to specify permissions and policies for letter requests.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Delete Request Permission

OnHold Request Permission

Linked Letters Permission

Request Permission

Email Request Permission

Print Request Permission

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Delete Request Permission

Use the Delete Request permission to specify whether users can delete pending letter requests and system-generated letter requests. If you enable the permission, users can delete pending letter requests that the user created. For more information, see Delete a Pending Letter Request.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Letters** > **Delete Request**.

Scope

This permission is available for all scopes.

Policy

The policy allows your organization to specify whether users can delete system-generated letter requests. Enable the permission for a scope and then specify the settings.

Can delete system generated letters: If selected, the user can delete system-generated letter requests.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Letters

Letters Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

OnHold Request Permission

Use the OnHold Request permission to specify whether users can place pending letter requests on hold for an account. For more information, see Suspend a Pending Letter Request.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Letters** > **OnHold Request**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Letters

Letters Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Linked Letters Permission

Use the Linked Letters permission to specify whether users can specify the linked accounts to include when requesting a letter that can include linked accounts. For more information, see Request a Letter.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Letters** > **Linked Letters**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Request a Letter

Letters Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Request Permission

Use the Request permission to specify whether users can request a letter for an account. For more information, see Request a Letter.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Letters** > **Request**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Request a Letter

Letters Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Email Request Permission

Use the Email Request permission to specify whether users can request an email a letter for an account. For more information, see Email a Letter.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Letters** > **Email Request**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

SMTP Permission

Search for a Permission or System Code

Set a Permission and Policy

Request a Letter

Letters Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Print Request Permission

Use the Print Request permission to specify whether users can request to print a letter for an account. For more information, see Print a Letter.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Letters** > **Print Request**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Request a Letter

Letters Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Misc Extra Data Settings

Misc Extra Data Settings

Use the Misc Extra Data settings to specify permissions and policies for miscellaneous extra data. Miscellaneous extra data is any type of information related to an account that users cannot record elsewhere within Latitude.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Create Misc Extra Data Permission

Update Misc Extra Data Permission

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Create Misc Extra Data Permission

Use the Create Misc Extra Data permission to specify whether users can add miscellaneous extra data. For more information, see Add Miscellaneous Extra Data.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Misc Extra Data** > **Create Misc Extra Data**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Add Miscellaneous Extra Data

Misc Extra Data Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Update Misc Extra Data Permission

Use the Update Misc Extra Data permission to specify whether users can modify miscellaneous extra data. For more information, see Modify Miscellaneous Extra Data.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Misc Extra Data** > **Update Misc Extra Data**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Modify Miscellaneous Extra Data

Misc Extra Data Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Name Template Config Permission

Use the Name Template Config permission to specify the format to use to display names in Latitude.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Name Template Config**.

Scope

This permission is available for the system scope only.

Policy

The policy allows your organization to specify the format for displaying names. Enable the permission for a scope and then specify the settings.

Template: Template to apply to names when displaying them in Latitude. The order in which you place the tokes is the order the system displays them in Latitude. Place formatting outside the curly brackets. For example, to display names in the system as "Doe, John E", type the following:

{{last}}, {{first}} {{middle}}

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Parties Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Notes Settings

Notes Settings

Use the Notes settings to specify permissions and policies for account notes.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Allow Redaction Permission

Create Notes Permission

Create Private Notes Permission

View Private Notes Permission

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Allow Redaction Permission

Use the Allow Redaction permission to specify whether users can redact (obscure) all or a portion of a note comment. For more information, see Redact an Account Note Comment.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Notes** > **Allow Redaction**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Redact an Account Note Comment

Notes Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Create Notes Permission

Use the Create Notes permission to specify whether users can add notes to accounts. For more information, see Add an Account Note.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Notes** > **Create Notes**.

Scope

This permission is available for all scopes.

Policy

The policy allows your organization to specify which action and result codes are available to users when adding notes to an account. Enable the permission for a scope and then specify the codes.

Restrict the available action codes to the following: If selected, the action codes available to users only includes the ones specified.

Action Codes: If you select an action code, it's available when users add notes to accounts.

Restrict the available result codes to the following: If selected, the result codes available to users only include the ones specified.

Result Codes: If you select a result code, it's available when users add notes to accounts.

Select None: Clears all selected items in the list.

Select All: Selects all items in the list.

> **Tip**: To select multiple sequential codes, press and hold the **Shift** key and then click the first and last sequential code. To select multiple non-sequential codes, press and hold the **Ctrl** key and then click each individual code.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Add an Account Note

Notes Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Create Private Notes Permission

Use the Create Private Notes permission to specify whether users can add private notes to accounts. Only users who have the **View Private Notes** permission can see private notes. For more information, see Add an Account Note.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Notes** > **Create Private Notes**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Add an Account Note

Notes Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

View Private Notes Permission

Use the View Private Notes permission to specify whether users can view private notes on accounts. For more information, see View Account Notes.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Notes** > **View Private Notes**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

View Account Notes

Notes Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Parties Settings

Feedback

Parties Settings

Use the Parties settings to specify permissions and policies for the parties on accounts.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Address Maintenance Permission

Update Name Permission

Update Name Alias Permission

Update Responsibility - Add Permission

Update Responsibility - Remove Permission

Update SSN Permission

View SSN Permission

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Update Address Permission

Use the Update Address permission to specify whether users can modify the addresses on accounts. For more information, see Modify an Address.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Parties** > **Update Address**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Modify an Address

Parties Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Update Name Permission

Use the Update Name permission to specify whether users can modify the names on accounts. For more information, see Maintain Contact Information.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Parties** > **Update Name**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Maintain Contact Information

Parties Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Update Name Alias Permission

Use the Update Name Alias permission to specify whether users can modify the alias names on accounts. For more information, see Maintain Contact Information.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Parties** > **Update Name Alias**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Maintain Contact Information

Parties Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Update Responsibility - Add Permission

Use the Update Responsibility - Add permission to specify whether users can designate the party responsible for an account. For more information, see Maintain Contact Information.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Parties** > **Update Responsibility - Add**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Maintain Contact Information

Parties Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Update Responsibility - Remove Permission

Use the Update Responsibility - Remove permission to specify whether users can indicate that a party on an account is not responsible for the account. For more information, see Maintain Contact Information.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Parties** > **Update Responsibility - Remove**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Maintain Contact Information

Parties Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Update SSN Permission

Use the Update SSN permission to specify whether users can modify an SSN on an account. This permission is not in use currently.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Parties** > **Update SSN**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Parties Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

View SSN Permission

Use the View SSN permission to specify whether users can view SSNs on accounts. This permission is not in use currently.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Parties** > **View SSN**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Parties Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Phones Settings

Feedback

Phones Settings

Use the Phones settings to specify permissions and policies for phone numbers associated to accounts.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Change Phone Consent Permission

Create Phone Numbers Permission

Mask Phone Numbers Permission

Phone Type Mapping Permission

Update Phone Numbers Permission

Update Phone Status Permission

Update Phone Type Permission

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Change Phone Consent Permission

Use the Change Phone Consent permission to specify whether users can modify the permission to call, auto-dial, text, or fax a phone number. For more information, see Add a Phone Number to an Account and Modify an Account Phone Number.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Phones** > **Change Phone Consent**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Phones Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Create Phone Numbers Permission

Use the Create Phone Numbers permission to specify whether users can add phone numbers to accounts. For more information, see Add a Phone Number to an Account.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Phones** > **Create Phone Numbers**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Add a Phone Number to an Account

Phones Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Mask Phone Numbers Permission

Use the Mask Phone Numbers permission to specify whether to mask all phone number occurrences in Latitude and the Genesys Cloud client. The Genesys Cloud client is available for Genesys Cloud integrations only.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Phones** > **Mask Phone Numbers**.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify the settings for masking phone numbers. Enable the permission for a scope and then specify the settings.

Trailing Digits to Display: Number of trailing phone number digits to display instead of asterisks (*). For example, if you type "2", the last two digits of the phone number display and the remaining digits appear as asterisks.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Phones Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Phone Type Mapping Permission

You can use the Phone Type Mapping permission in Latitude to map phone types to an action code. When a user or campaign places a call to a specific type of phone (for example, home phone), Latitude assigns the associated action code.

Location

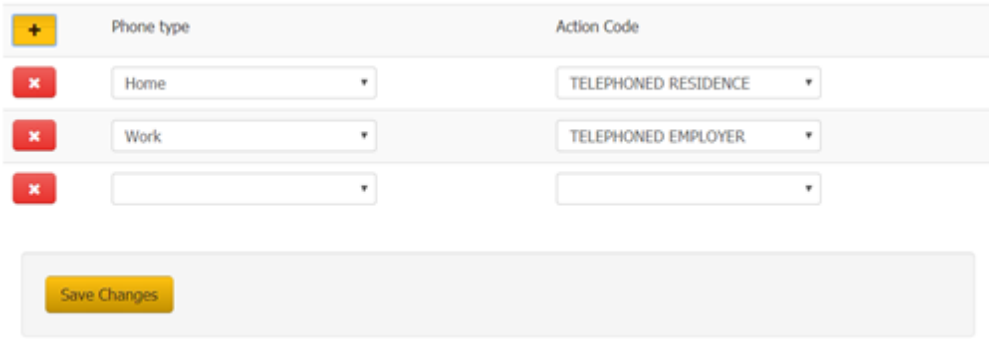
In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Phones** > **Phone Type Mapping**.

Scope

This permission is available for all scopes.

To map a phone type

1. In the **Scope** list box, click the scope for the permission and then, in the **Phone Type Mapping** panel, click **Enabled**.
2. In the **Action Codes** list box, click the default action code to use for a phone type that doesn't have an action code mapped.
3. In the mapping section, do the following:
    a. Click the plus sign (+). A blank row appears.



    b. In the **Phone Type** box, click a phone type to map to a Latitude action code.
    c. In the **Action Code** box, click the Latitude action code to map to the phone type.
    d. Continue mapping phone types as necessary and then click **Save Changes**.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Phones Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Update Phone Numbers Permission

Use the Update Phone Numbers permission to specify whether users can modify phone numbers on accounts. For more information, see Modify a Phone Number on an Account.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Phones** > **Update Phone Numbers**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Modify a Phone Number on an Account

Phones Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Update Phone Status Permission

Use the Update Phone Status permission to specify whether users can modify the status of phone numbers on accounts. For more information, see Change the Status of an Account Phone Number or Modify a Phone Number on an Account.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Phones** > **Update Phone Status**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Change the Status of an Account Phone Number

Modify a Phone Number on an Account

Phones Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Update Phone Type Permission

Use the Update Phone Type permission to specify whether users can modify the phone types on accounts. For more information, see Modify a Phone Number on an Account.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Phones** > **Update Phone Type**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Modify a Phone Number on an Account

Phones Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

RDN Integration

Feedback

Allow RDN Case Creation and Updates Permission

Use the Allow RDN Case Creation and Updates permission to specify whether users can create and update vehicle recovery cases on the **RDN Integration** panel. Latitude integrates with the RDN system to allow the exchange of recovery case data. For more information, see RDN Integration.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **RDN Integration** > **Allow RDN Case Creation and Updates**.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

RDN Service Configuration

RDN Integration

Account Data Settings

Application Settings

Permissions and Policies

Feedback

RDN Service Configuration

Use the RDN Service Configuration permission to specify the URL and API key for the RDN system. Latitude integrates with the RDN system to allow the exchange of recovery case data. For more information, see RDN Integration.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **RDN Integration** > **RDN Service Configuration**.

Scope

This permission is available for the system scope only.

Policy

The policy allows your organization to specify the URL and API key for the RDN system. Enable the permission for a scope and then specify the settings.

RDN URL: URL and API key for the RDN system. When you save the information, the system masks the API key for security purposes.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Allow RDN Case Creation and Updates Permission

RDN Integration

Account Data Settings

Application Settings

Permissions and Policies

Scheduled Payments Settings

Scheduled Payments Settings

Use the Scheduled Payments settings to specify permissions and policies for scheduled payments.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Create Scheduled Payments Permission

Credit Cards Permission

Direct Debit Permission

Direct Debit Client Representment Rules Permission

Direct Debit Guarantee Entity Name Permission

User Policy Permission

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Business Rules

Business Rules

Use the Business rules to specify permissions and policies for credit card, PDCs, and Promises.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Change Continue Queuing Setting Permission

Custom Queue Options Permission

Queue Providers Permission

Access Accounts Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Credit Card Permission

Use the Credit Card permission to specify the settings for scheduling payments on an account. For more information, see Arrangements.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Scheduled Payments** > **Business Rules** > **Credit Card**.

Scope

This permission is available for the following scopes.

- System
- Role
- User
- Business Class
- Client Group
- Client

Policy

This policy allows your organization to specify the settings for credit card payments on an Account. Enable the permission for a scope and then specify the settings.

User is not required to observe customer business rules. If selected, the user can bypass the payment business rules.

The following settings apply for the first credit card item in a series.

Minimum Payment Amount: Minimum amount required for payment where no future scheduled payments exist or the first payment in the arrangement.

Maximum Days to Payment (0 = Disable): Maximum number of days into the future that you can post-date the payment or first payment in the arrangement.

Maximum Payment (0 = unlimited): Maximum number of payments that the payment arrangement can include. If you specify zero (0), no limitation applies.

Minimum Subsequent Payment Amount: Minimum amount required for all payments that follow the first payment in the arrangement.

Maximum Days Between Payments (0 = disable): Maximum number of days required between payments in the payment arrangement. If you specify zero (0), no limitation applies.

Maximum Days to Last Payment (0 = disable): Maximum number of days into the future from the current date that the user can create the last payment in the payment arrangement.

Minimum Arrangement Amount: Total Minimum amount required for scheduled payments exist in the arrangement.

Allow user to enter a settlement arrangement for less than the customer blanket settlement: The setting specifies whether or not the user may enter a settlement arrangement for less than a customer blanket settlement percentage if one applies.

Accepted Credit Cards: If you select a credit card type, it's available when users create or reschedule scheduled payments.

Select None: Clears all selected items in the list.

Select All: Selects all items in the list.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Scheduled Payments Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

PDCs Permission

Use the PDCs permission to specify the settings for scheduling payments on an account. For more information, see Arrangements.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Scheduled Payments** > **Business Rules** > **PDCs**.

Scope

This permission is available for all the scopes.

- System
- Role
- User
- Business Class
- Client group
- Client

Policy

The policy allows your organization to specify the settings for PDC payments on an account. Enable the permission for a scope and then specify the settings.

User is not required to observe customer business rules: If selected, the user can bypass the payment business rules.

Minimum Check amount: Minimum amount required for a payment where no future scheduled payments exist, or the first payment in the arrangement.

Maximum Days to Deposit (0 = Disable): Maximum number of days into the future that you can post-date the payment or first payment in the arrangement.

Maximum Check (0 = unlimited): Maximum number of payments that the payment arrangement can include. If you specify zero (0), no limitation applies.

Minimum Subsequent Check Amount: Minimum amount required for all payments that follow the first payment in the arrangement.

Maximum Days Between Checks (0 = disable): Maximum number of days required between payments in the payment arrangement. If you specify zero (0), no limitation applies.

Maximum Days to Last Check (0 = disable): Maximum number of days into the future from the current date that the user can create the last payment in the payment arrangement.

Minimum Arrangement Amount: Total Minimum amount required for scheduled payments exist in the arrangement.

Allow user to enter a settlement arrangement for less than the customer blanket settlement: The setting specifies whether or not the user may enter a settlement arrangement for less than a customer blanket settlement percentage if one applies.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Scheduled Payments Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Promises Permission

Use the Promises permission to specify the settings for scheduling payments on an account. For more information, see Arrangements.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Scheduled Payments** > **Business Rules** > **Promises**.

Scope

This permission is available for all the scopes.

- System
- Role
- User
- Business Class
- Client group
- Client

Policy

The policy allows your organization to specify the settings for Promise payments on an account. Enable the permission for a scope and then specify the settings

User is not required to observe customer business rules: If selected, the user can bypass the payment business rules.

Minimum Promise amount: Minimum amount required for a payment where no future scheduled payments exist, or the first payment in the arrangement.

Maximum Days to Promise (0 = Disable): Maximum number of days into the future that you can post-date the payment or first payment in the arrangement.

Maximum Promises (0 = unlimited): Maximum number of payments that the payment arrangement can include. If you specify zero (0), no limitation applies.

Minimum Additional Promise Amount: Minimum amount required for all payments that follow the first payment in the arrangement.

Maximum Days Between Promises (0 = disable): Maximum number of days required between payments in the payment arrangement. If you specify zero (0), no limitation applies.

Maximum Days to Last Promise (0 = disable): Maximum number of days into the future from the current date that the user can create the last payment in the payment arrangement.

Minimum Arrangement Amount: Total Minimum amount required for scheduled payments exist in the arrangement.

Allow user to enter a settlement arrangement for less than the customer blanket settlement : The setting specifies whether or not the user may enter a settlement arrangement for less than a customer blanket settlement percentage if one applies.

Can Change Reminder Days : Allow user to change the dates of the reminder letters**.**

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Scheduled Payments Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Allow Overpayments Permission

Use the Allow Overpayments permission to specify whether to allow payment arrangements that exceed the account balance and if so, the maximum overpayment percentage allowed. For more information, see Propose a Payment Arrangement.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Scheduled Payments** > **Allow Overpayments**.

Scope

This permission is available for the following scopes:

- System
- Business Class
- Client
- Client Group

Policy

The policy allows your organization to specify the settings for overpayments. Enable the permission for a scope and then specify the setting.

Maximum Over Payment Percent (0 = No Limit): Maximum percentage of the account balance that users are allowed to increase the payment by when scheduling overpayments. For example, if the account balance is $100 and the maximum overpayment percentage allowed is 10%, users cannot create an overpayment arrangement for more than $110. If you specify zero (0), no limitation applies.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Scheduled Payments Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Client Policy

Use the Client Policy to specify the settings for scheduling payments on an account. For more information, see Arrangements.

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Scheduled Payments > Client Policy.**

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

The policy allows your organization to specify the settings for scheduling payments on an account. Enable the permission for a scope and then specify the settings.

Utilizing the existing policy to check if the interest is accrue or deferral

If the policy is disabled, system is calculating the deferral interest value and updating in a master table.

- **Accepted Payment Types:** If you select a payment type, it's available when users create or reschedule scheduled payments.
- **Settlements Not Allowed:** If selected, users cannot create SIF arrangements.
- **Filter Payment Frequencies:** If selected, only the frequencies selected in the Acceptable Payment Frequencies list box are available when users create or reschedule scheduled payments. If cleared, all payment frequencies are available when users create or reschedule scheduled payments, regardless of what you have selected in the Acceptable Payment Frequencies list box.
- **Acceptable Payment Frequencies:** If you select a payment frequency and select the Filter Payment Frequencies check box, the payment frequency is available when users create or

reschedule scheduled payments. If you select a payment frequency and clear the Filter Payment Frequencies check box, all payment frequencies are available when users create or reschedule scheduled payments.

Select None: Clears all selected items in the list.
Select All: Selects all items in the list.

> **Tip**: To select multiple sequential payment or credit card types, press and hold the **Shift** key and then click the first and last sequential payment or credit card type. To select multiple non-sequential payment or credit card types, press and hold the **Ctrl** key and then click each individual payment or credit card type.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Scheduled Payments Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Credit Cards Permission

Use the Credit Cards permission to specify the settings for credit cards. For more information, see Add a Credit Card.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Scheduled Payments** > **Credit Cards**.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify whether the user can include the credit card security code and whether your organization requires the security code. Enable the permission for a scope and then specify the settings.

Allow entry of credit card security code: If selected, the user can include the credit card security code when adding a credit card payment to an account.

Allow entry of credit card postal code: If selected, the user can include the credit card postal code when adding a credit card payment to an account.

Require credit card postal code: If selected, your organization requires the user to provide the credit card postal code when adding a credit card payment to an account.

Allow entry of credit card street 1: If selected, the user can include the credit card street address line 1 when adding a credit card payment to an account.

Require credit card street 1: If selected, your organization requires the user to provide the credit card street address line 1 when adding a credit card payment to an account.

Mask data when typing credit card account number: If selected, when the user types the credit card account number, the system replaces the typed characters with periods.

Require dual entry of credit card account number for validation: If selected, the user must type the credit card account number twice for validation purposes. If the numbers don't match, an error message displays.

Allow entry of credit card street 2: If selected, the user can include the credit card street address line 2 when adding a credit card payment to an account.

Require credit card street 2: If selected, your organization requires the user to provide the credit card street address line 2 when adding a credit card payment to an account.

Allow entry of credit card city: If selected, the user can include the credit card city when adding a credit card payment to an account.

Require credit card city: If selected, your organization requires the user to provide the credit card city when adding a credit card payment to an account.

Allow entry of credit card state: If selected, the user can include the credit card state when adding a credit card payment to an account.

Require credit card state: If selected, your organization requires the user to provide the credit card state when adding a credit card payment to an account.

Restrict card payments to debit cards: If selected, the user can restrict adding a credit card to wallet.

Note: For this option bin_list table is used. If there is no data in bin_list table, System will allow all cards. If there is data present in the bin_list table , it will compare first 4 digits of the card with bin column in bin_list table also check for type column(credit/debit). If the digits are matching and type is credit card, it will restrict the card insertion to the wallet.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Add a Credit Card

Scheduled Payments Settings

Account Data Settings

Liquid Latitude Settings

Permissions and Policies

Feedback

Direct Debit Permission

Use the Direct Debit permission to specify the settings for Direct Debits. For more information, see Add a Direct Debit Account.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Scheduled Payments** > **Direct Debit**.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify the threshold for scheduling first and subsequent Direct Debit payments. Enable the permission for a scope and then specify the settings.

Lead-time Days threshold for first payment: Minimum number of days from the current date that a user can schedule the first Direct Debit payment. For example, if the current date is "April 28, 2016" and the threshold is "7," the user cannot schedule the first payment until May 5, 2016 or later.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Add a Direct Debit Account

Scheduled Payments Settings

Account Data Settings

Liquid Latitude Settings

Permissions and Policies

Feedback

Direct Debit Client Representment Rules Permission

Use the Direct Debit Client Representment Rules permission to specify the rules for representing returned Direct Debit payments.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Scheduled Payments** > **Direct Debit Client Representment Rules**.

Scope

This permission is available for the following scopes:

- Client
- Client Group
- Business Class

Policy

The policy allows your organization to specify the rules for representing returned payments. Enable the permission for a scope and then specify the settings.

Allow payments to be represented: If selected, users can represent returned payments.

Represent in Care: If selected, users can represent returned payments for accounts that are in care.

Minimum amount to represent: Minimum payment amount required to represent.

Days in future to represent on processing a return: Number of days after processing the error file to schedule the payment for representment.

Maximum days from return to represent: Maximum number of days after which a user can no longer represent the payment. The calculation starts from the returned payment receipt date.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Add a Direct Debit Account

Scheduled Payments Settings

Account Data Settings

Liquid Latitude Settings

Permissions and Policies

Feedback

Direct Debit Guarantee Entity Name Permission

Use the Direct Debit Guarantee Entity Name permission to specify the entity who is guaranteeing Direct Debits.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Scheduled Payments** > **Direct Debit Guarantee Entity Name**.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify the entity who is guaranteeing Direct Debits. Enable the permission for a scope and then specify the entity.

Entity used in Direct Debit Guarantee: Name of the entity who is guaranteeing Direct Debits..

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Add a Direct Debit Account

Scheduled Payments Settings

Account Data Settings

Liquid Latitude Settings

Permissions and Policies

Feedback

Scheduled Payments - User Policy Permission

Use the User Policy permission to specify the actions a user can take when scheduling or modifying a payment on an account. For more information, Arrangements.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Scheduled Payments** > **User Policy**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

The policy allows your organization to specify the actions a user can take when creating or modifying scheduled payments. Enable the permission for a scope and then specify the settings.

Allow user to suppress surcharge assessment on new arrangements: If selected, the user can remove the surcharge on a new arrangement.

Allow Updating of Scheduled Payments entered by Other Users: If selected, allows the user to modify scheduled payments that other users created.

Allow User to Update Their Own Scheduled Payments: If selected, allows the user to modify scheduled payments that the user created.

Allow Updating of Scheduled Payments Hold Flag: If selected, allows the user to place a scheduled payment on hold and release the hold.

Maximum Total Number of Scheduled Payments (0 = unlimited): Maximum number of scheduled payments allowed. If blank or zero, there is no maximum limit.

Allow saving Payment Instrument to Wallet: If selected, allows the user to save a payment instrument to a customer's wallet.

Allow deleting Payment Instrument from Wallet: If selected, allows the user to delete a payment instrument from a customer's wallet.

Allow lookup of previously used Payment Instruments not saved in Wallet: If selected, allows the user to look up payment instruments previously used on an account and not saved to a customer's wallet.

% Allowed Below Minimum: Percent below the minimum settlement amount allowed before requiring supervisor approval.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Scheduled Payments Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Update User Date 1 Permission

Use the Update User Date 1 permission to specify whether users can modify dates for the user-defined date 1 box. For more information, see View or Modify Account Dates.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Update User Date 1**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

View or Modify Account Dates

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Update User Date 2 Permission

Use the Update User Date 2 permission to specify whether users can modify dates for the user-defined date 2 box. For more information, see View or Modify Account Dates.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Update User Date 2**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

View or Modify Account Dates

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Update User Date 3 Permission

Use the Update User Date 3 permission to specify whether users can modify dates for the user-defined date 3 box. For more information, see View or Modify Account Dates.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Update User Date 3**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

View or Modify Account Dates

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Warnings Settings

Warnings Settings

Use the Warnings settings to specify permissions and policies for displaying state and time zone warnings.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Display State Warnings Permission

Display Time Zone Warnings Permission

Warning Dialog Permission

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Display State Warnings Permission

Use the Display State Warnings permission to specify whether state warnings display when viewing an account for a state with restrictions. For more information, see View Account Warnings.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Warnings** > **Display State Warnings**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

View Account Warnings

Warnings Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Display Time Zone Warnings Permission

Use the Display Time Zone Warnings permission to specify whether a warning displays when viewing an account during a restricted time period. Latitude calculates the time based on the postal code associated to the account. For more information, see View Account Warnings.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Warnings** > **Display Time Zone Warnings**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

View Account Warnings

Warnings Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Warning Dialog Permission

Use the Warning Dialog permission to specify whether warnings appear automatically. For more information, see View Account Warnings.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Account Data** > **Warnings** > **Warning Dialog Policy**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

The policy allows your organization to specify under what conditions warning messages display. Enable the permission for a scope and then specify the condition.

Display Behavior: Condition under which warnings display automatically. Valid values are:

- **Always display warning dialog:** Displays warning messages even when no warnings exist for the account.
- **Only display warning dialog if warnings exist:** Displays warning messages when warnings exist for the account.

Note: If your organization disabled the permission or didn't configure it, Latitude doesn't display warning messages automatically when an account displays. However, if warnings exist for an account, users can click an option in the menu bar to display the warning messages.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

View Account Warnings

Warnings Settings

Account Data Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Applicable Processes and Stages Permission

Use the Applicable Processes and Stages permission to select the processes and stages available to users. For more information, see Process Stages.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Process Orchestration** > **Applicable Processes and Stages**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Business Class
- Client Group
- Client

Policy

The policy allows your organization to specify which processes are available to users and which stages within that process that users can move accounts through. Enable the permission for a scope and then select the allowed processes and stages. If you select a process and stage, it's available to users.

Conditions: If you select a condition (process and stage), it's available to users.

> **Tip**: To select multiple sequential conditions, press and hold the **Shift** key and then click the first and last sequential condition. To select multiple non-sequential conditions, press and hold the **Ctrl** key and then click each individual condition.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Liquid Latitude Settings

Application Settings

Permissions and Policies

Dialer Functionality Settings

Dialer Functionality Settings

Use the Dialer Functionality settings to specify permissions and policies for the Dialer Agent Interface.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Dialer Permission

Map a Disposition Code to a Result Code

Liquid Latitude Settings

Application Settings

Permissions and Policies

Dialer Permission

Use the Dialer permission to specify whether to display the PureConnect client (for PureConnect integrations) or the Genesys Cloud client (for Genesys Cloud integrations).

For a quick overview for displaying the Genesys Cloud client, watch this video!

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Dialer Functionality** > **Dialer**.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

The policy allows your organization to specify the settings for displaying PureConnect client (for PureConnect integrations) or the Genesys Cloud client (for Genesys Cloud integrations). Enable the permission for a scope and then specify the settings.

Type of Dialer: Type of dialer to use with Latitude.

Server Name: Name of the dialer server.

Dialer Client URL: Web address for the dialer client.

Dialer API: Web address for the Genesys Cloud API. (For Genesys Cloud integrations only.)

Token: Client ID and **Client Secret** values for the Latitude API OAuth Client that your organization created in Genesys Cloud, separated by the pipe character. For example, 65b7aTR3432|4LMixz841ab. (For Genesys Cloud integrations only.)

User can make manual call through dialer client: If selected, the user can place calls manually through the Genesys Cloud client. (For Genesys Cloud integrations only.)

Default Result Code: Result code to use when the agent selects a disposition code that doesn't map to a Latitude result code.

Disposition Code Mappings: Allows you to map disposition codes from your dialer server to result codes in Latitude. For more information about mapping codes, see Map a Disposition Code to a Result Code.

Disposition Code: Dialer server disposition code to map to the Latitude result code.

Result Code: Latitude result code to map to the dialer disposition code.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Liquid Latitude Settings

Application Settings

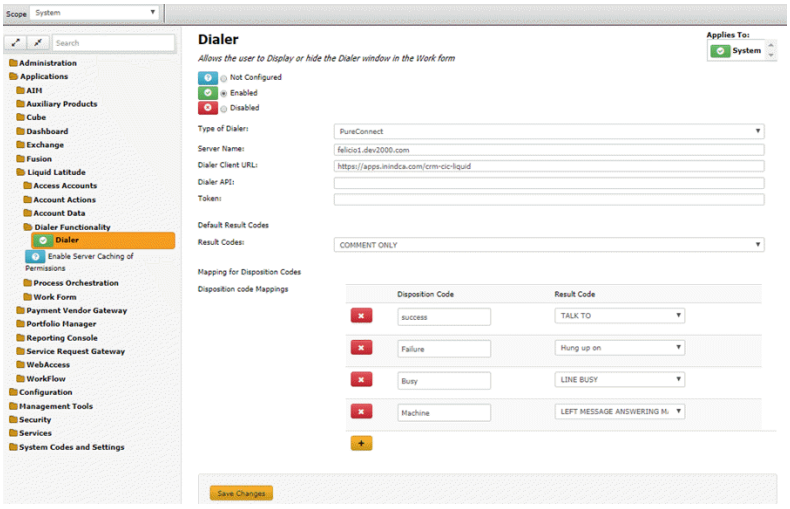
Permissions and Policies

Map a Disposition Code to a Result Code

Use the **Dialer** panel to map disposition codes from your Dialer server to result codes in Latitude.

To map a disposition code to a result code

1. In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Dialer Functionality** > **Dialer**.



Disposition Code: Dialer server disposition code to map to the Latitude result code.

Result Code: Latitude result code to map to the Dialer server disposition code.

Note: This code must match exactly to an existing disposition that you mapped in the Script in Interaction Administrator.

2. Click the plus sign (+). A blank row appears in the data grid.

3. Complete the information and then click **Save Changes**.

Note: To modify a mapping, type or select a new value and then save it. To delete a mapping, click the Delete icon.

Enable Server Caching of Permissions

Use the Enable Server Caching of Permissions permission to turn on or off the caching of permissions. When you turn on caching, the system attempts to retrieve permission settings from the cache. If the permission setting isn't in the cache, the system retrieves the permission setting from the database and stores it in the cache for future retrieval. When a user modifies a permission, the system clears the cache. When you turn off caching, the system retrieves permission settings from the database.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Enable Server Caching of Permissions**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Liquid Latitude Settings

Application Settings

Permissions and Policies

Work Form Settings

Work Form Settings

Use the Work Form settings to specify which components can display.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Anchor Permission

Anchor Follow-up Data Permission

Reference Panels Permission

Task Panels Permission

Time on Account Configuration Permission

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Anchor Permission

Use the Anchor permission to specify the default account anchor to display when viewing an account. For more information, see Delinquency or Recovery Anchor.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Work Form** > **Anchor**.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify the default anchor to display (for example, delinquency or recovery)**.** Enable the permission for a scope and then specify the default anchor to display.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Delinquency or Recovery Anchor

Work Form Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Anchor Follow-up Data Permission

Use the Anchor Follow-up Data permission to specify the follow-up data to display when viewing an account.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Work Form** > **Anchor Followup Data**.

Scope

This permission is available for the following scopes:

- System
- Business Class
- Customer Group
- Customer

Policy

The policy allows your organization to specify the follow-up data to show when displaying an account**.** Enable the permission for a scope and then specify the follow-up data to display.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Work Form Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Reference Panels Permission

Use the Reference Panels permission to specify the reference panels to display, and to specify which panel is the default panel. All users can display the **Notes** and **Interactions** panels. For more information, see Reference Panels.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Work Form** > **Reference Panels**.

Scope

This permission is available for all scopes.

Policy

The policy allows your organization to specify the reference panels that are available to users. Enable the permission for a scope and then specify the panels to display.

Default Panel: Default panel to display.

Available Panels: If you select a reference panel, users can view it.

Select None: Clears all selected items in the list.

Select All: Selects all items in the list.

> **Tip**: To select multiple sequential panels, press and hold the **Shift** key and then click the first and last sequential panel. To select multiple non-sequential panels, press and hold the **Ctrl** key and then click each individual panel.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Reference Panels

Work Form Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Task Panels Permission

Use the Task Panels permission to specify which task panels that users can view, and which task panel is the default panel to display. For more information, see Task Panels.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Work Form** > **Task Panels**.

Scope

This permission is available for all scopes.

Policy

The policy allows your organization to specify the task panels that are available to users. Enable the permission for a scope and then specify the task panels to display.

Default Task Panel: Default task panel to display.

Available Task Panels: If you select a task panel, users can view it.

Select None: Clears all selected items in the list.

Select All: Selects all items in the list.

> **Tip**: To select multiple sequential panels, press and hold the **Shift** key and then click the first and last sequential panel. To select multiple non-sequential panels, press and hold the **Ctrl** key and then click each individual panel.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Task Panels

Work Form Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Feedback

Time on Account Configuration Permission

Use the Time on Account Configuration permission to specify the caution and warning thresholds for time spent on an account, and the duration of an open interaction. When the time reaches the specified thresholds, the background color of the **Time on Account** indicator in the status bar and on the **Since** column in the **Open Interactions** panel changes color accordingly. For more information, see Work Form Overview and View Open Interactions.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Work Form** > **Time on Account Configuration**.

Scope

This permission is available for all scopes.

Policy

These policies allow your organization to specify the thresholds for caution and warning zones. Enable the permission for a scope and then specify the thresholds for each zone.

Caution Color Boundary: Threshold (in hours, minutes, and seconds) for displaying a yellow background on the **Time on Account** indicator in the status bar and on the **Since** column in the **Open Interactions** panel.

Warning Color Boundary: Threshold (in hours, minutes, and seconds) for displaying a red background on the **Time on Account** indicator in the status bar and on the **Since** column in the **Open Interactions** panel.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Work Form Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Event Details Display View Permission

Use the Event Details Display View permission to specify which event details that users can view, and which event details is the default panel to display.

Location

In the **Navigation** pane, click **Applications** > **Liquid Latitude** > **Work Form** > **Event Details Display View**.

Scope

This permission is available for all scopes.

Policy

The policy allows your organization to specify the event details that are available to users. Enable the permission for a scope and then specify the event details to display.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Task Panels

Work Form Settings

Liquid Latitude Settings

Application Settings

Permissions and Policies

Payment Vendor Gateway Settings

Payment Vendor Gateway Settings

Use the Payment Vendor Gateway settings to specify permissions and policies for Payment Vendor Gateway (PVG). PVG allows users to request payment transaction processing from vendors over a secure connection.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Access Batch Wizard Permission

ACH Vendor Information Permission

Batch Processor System Permission

Credit Card Vendor Information Permission

Customer Information Profiles Permission

Enable Payment Vendor Gateway Permission

Paper Draft Vendor Information Permission

Application Settings

Permissions and Policies

Access Batch Wizard Permission

Use the Access Batch Wizard permission to specify whether users can use the Batch Processor. For more information, see Process a Payment Batch.

Location

In the **Navigation** pane, click **Applications** > **Payment Vendor Gateway** > **Access Batch Wizard**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Process a Payment Batch

Payment Vendor Gateway Permissions and Policies

Applications Permissions and Policies

Permissions and Policies

ACH Vendor Information Permission

Use the ACH Vendor Information permission to specify a vendor's settings for processing ACH payment transactions using Payment Vendor Gateway (PVG).

Location

In the **Navigation** pane, click **Applications** > **Payment Vendor Gateway** > **ACH Vendor Information**.

Scope

This permission is available for the following scopes:

- System
- Business Class
- Client Group
- Client

Policy

The policy allows your organization to specify settings for ACH payment processing through a payment vendor using PVG. Enable the permission for a scope and then specify the settings.

Vendor Info Parameter 1: Credentials that the payment vendor provided to allow you to process ACH payment transactions. The format is:

securityToken=<principalCredential>|securityTokenSurcharge=<surchargeCredential>|mode=principal

Vendor Info Parameter 2: PINs that the payment vendor provided to allow you to process ACH payment transactions. The format is:

pin=<principalCredentialPIN>|pinSurcharge=<surchargeCredentialPIN>

Note: Replace the text within the less than and greater than signs (<>) with the appropriate values. If you are sending surcharges with the principal as a single transaction, specify the "surchargeCredential" and "surchargeCredentialPIN."

Send the surcharge as a separate transaction?: If selected, Latitude sends surcharges as separate transactions and records two transactions on the account.

Note: If you are sending surcharges as separate transactions, specify the **Vendor Surcharge Info Parameter 1** and **Vendor Surcharge Info Parameter 1** values. Replace the text within the less than and greater than signs (<>) with the appropriate values.

Vendor Surcharge Info Parameter 1: Credential that the payment vendor provided to allow you to process ACH surcharge transactions separately from the principal. The format is:

securityTokenSurcharge=<surchargeCredential>|mode=surcharge

Vendor Surcharge Info Parameter 2: PIN that the payment vendor provided to allow you to process ACH surcharge transactions separately from the principal. The format is:

pinSurcharge=<surchargeCredentialPIN>

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Payment Vendor Gateway Permissions and Policies

Applications Permissions and Policies

Permissions and Policies

Feedback

Batch Processor System Permission

Use the Batch Processor System permission to specify system settings for the Batch Processor that creates batches of payments for each payment type. The Batch Processor posts transactions to the affected accounts.

Location

In the **Navigation** pane, click **Applications** > **Payment Vendor Gateway** > **Batch Processor System**.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify the URL for the Batch Processor. Enable the permission for a scope and then specify the settings.

URL for Batch Job Processor System: URL to display the Batch Processor in Latitude.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Payment Vendor Gateway Settings

Application Settings

Permissions and Policies

Feedback

Credit Card Vendor Information Permission

Use the Credit Card Vendor Information permission to specify a vendor's settings for processing credit card payment transactions using Payment Vendor Gateway (PVG).

Location

In the **Navigation** pane, click **Applications** > **Payment Vendor Gateway** > **Credit Card Vendor Information**.

Scope

This permission is available for the following scopes:

- System
- Business Class
- Client Group
- Client

Policy

The policy allows your organization to specify settings for credit card payment processing through a payment vendor using PVG. Enable the permission for a scope and then specify the settings.

Vendor Info Parameter 1: Credentials that the payment vendor provided to allow you to process credit card payment transactions. The format is:

securityToken=<principalCredential>|securityTokenSurcharge=<surchargeCredential>|mode=principal

Vendor Info Parameter 2: PINs that the payment vendor provided to allow you to process credit card payment transactions. The format is:

pin=<principalCredentialPIN>|pinSurcharge=<surchargeCredentialPIN>

Note: Replace the text within the less than and greater than signs (<>) with the appropriate values. If you are sending surcharges with the principal as a single transaction, specify the "surchargeCredential" and "surchargeCredentialPIN."

Send the surcharge as a separate transaction?: If selected, Latitude sends surcharges as separate transactions and records two transactions on the account.

Note: If you are sending surcharges as separate transactions, specify the **Vendor Surcharge Info Parameter 1** and **Vendor Surcharge Info Parameter 1** values. Replace the text within the less than and greater than signs (<>) with the appropriate values.

Vendor Surcharge Info Parameter 1: Credential that the payment vendor provided to allow you to process credit card surcharge transactions separately from the principal. The format is:

securityTokenSurcharge=<surchargeCredential>|mode=surcharge

Vendor Surcharge Info Parameter 2: PIN that the payment vendor provided to allow you to process credit card surcharge transactions separately from the principal. The format is:

pinSurcharge=<surchargeCredentialPIN>

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Payment Vendor Gateway Permissions and Policies

Applications Permissions and Policies

Permissions and Policies

Feedback

Customer Information Profiles Permission

Use the Customer Information Profiles permission to specify the profiles to use to send information to Payment Vendor Gateway (PVG) for the payment processing vendor's use.

Location

In the **Navigation** pane, click **Applications** > **Payment Vendor Gateway** > **Customer Information Profiles**.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify profiles to use to send information to PVG for the payment processing vendor's use. Enable the permission for a scope and then specify the settings.

Select the Customer Information Profile for Real Time Batch Credit Card Processing: Profile to use when processing batches of credit card payments.

Select the Customer Information Profile for Batch ACH Processing: Profile to use when processing batches of ACH payments.

Select the Customer Information Profile for Batch Paper Draft Processing: Profile to use when processing batches of paper draft payments.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Payment Vendor Gateway Permissions and Policies

Applications Permissions and Policies

Permissions and Policies

Feedback

Enable Payment Vendor Gateway Permission

Use the Enable Payment Vendor Gateway permission to allow your organization to use Payment Vendor Gateway (PVG) for sending transactions to payment processing vendors. The default value points to an IIS server that Latitude uses (primarily for hosted clients). If you are not using Latitude in a hosted environment, set up an IIS server to host the service.

Location

In the **Navigation** pane, click **Applications** > **Payment Vendor Gateway** > **Enable Latitude Payment Vendor Gateway**.

Scope

This permission is available for the following scopes:

- System

- Business Class
- Customer
- Customer Group

NOTE:

If a payment vendor is changed in the same Scope (System, Business Class, Customer, Customer Group), then the following points will apply.

1. Existing tokens that are mapped to old vendor will stay as it is and need not be migrated to new vendor.
2. Newly created tokens will be mapped to newly configured vendor.
3. All existing payments that use the old tokens will be processed by the old vendor.

Any new payments scheduled after the vendor change will be processed by the new vendor.

Policy

The policy allows your organization to specify Payment Vendor Gateway settings. Enable the permission for a scope and then specify the settings.

URL for Payment Vendor Gateway: URL address for PVG. The default value points to an IIS server that Latitude uses (primarily for hosted clients). If you are not using Latitude in a hosted environment, set up an IIS server to host the service.

Select the Vendor for Real Time and Batch Credit Card Processing: Default vendor your company uses for credit card processing. Configure the Credit Card Vendor Information permission also.

> **Note:** To decline payments for repay, select **Repay** option from the list.

Use vendor interface to capture credit card information: If selected, Latitude presents the vendor's interface to the user to collect credit card information.

Use alternative method for surcharge transaction: If selected, Latitude uses another method for surcharge transactions.

Vendor manages payment arrangements: If selected, the vendor manages payment arrangements.

Select the Vendor for Batch ACH Processing: Default vendor your company uses for ACH processing. Configure the ACH Vendor Information permission also.

> **Note:** To decline payments for repay, select **Repay** option from the list.

Use vendor interface to capture bank account information: If selected, Latitude presents the vendor's interface to the user to collect bank account information.

Use alternative method for surcharge transaction: If selected, Latitude uses another method for surcharge transactions.

Vendor manages payment arrangements: If selected, the vendor manages payment arrangements.

Select the Vendor for Batch Paper Draft Processing: Default vendor your company uses for paper draft processing. Configure the Paper Draft Vendor Information permission also.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Payment Vendor Gateway Settings

Application Settings

Permissions and Policies

Feedback

Paper Draft Vendor Information Permission

Use the Paper Draft Vendor Information permission to specify a vendor's settings for processing paper draft payment transactions using Payment Vendor Gateway (PVG).

Location

In the **Navigation** pane, click **Applications** > **Payment Vendor Gateway** > **Paper Draft Vendor Information**.

Scope

This permission is available for the following scopes:

- System
- Business Class
- Client Group
- Client

Policy

The policy allows your organization to specify settings for paper draft payment processing through a payment vendor using PVG. Enable the permission for a scope and then specify the settings.

Vendor Info Parameter 1: Credentials that the payment vendor provided to allow you to process paper draft payment transactions. The format is:

securityToken=<principalCredential>|securityTokenSurcharge=<surchargeCredential>|mode=principal

Vendor Info Parameter 2: PINs that the payment vendor provided to allow you to process paper draft payment transactions. The format is:

pin=<principalCredentialPIN>|pinSurcharge=<surchargeCredentialPIN>

Note: Replace the text within the less than and greater than signs (<>) with the appropriate values. If you are sending surcharges with the principal as a single transaction, specify the "surchargeCredential" and "surchargeCredentialPIN."

Send the surcharge as a separate transaction?: If selected, Latitude sends surcharges as separate transactions and records two transactions on the account.

Note: If you are sending surcharges as separate transactions, specify the **Vendor Surcharge Info Parameter 1** and **Vendor Surcharge Info Parameter 1** values. Replace the text within the less than and greater than signs (<>) with the appropriate values.

Vendor Surcharge Info Parameter 1: Credential that the payment vendor provided to allow you to process paper draft surcharge transactions separately from the principal. The format is:

securityTokenSurcharge=<surchargeCredential>|mode=surcharge

Vendor Surcharge Info Parameter 2: PIN that the payment vendor provided to allow you to process paper draft surcharge transactions separately from the principal. The format is:

pinSurcharge=<surchargeCredentialPIN>

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Payment Vendor Gateway Permissions and Policies

Applications Permissions and Policies

Permissions and Policies

Portfolio Manager Settings

Portfolio Manager Settings

Use the Portfolio Manager settings to specify permissions and policies for Portfolio Manager.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Access Portfolio Manager Permission

Access Reports Permission

Access Tools Permission

Add/Edit/Delete Buyers Permission

Add/Edit/Delete Investors Permission

Add/Edit/Delete Purchases Permission

Add/Edit/Delete Sales Permission

Add/Edit/Delete Samples Permission

Add/Edit/Delete Sellers Permission

View Buyers Permission

View Investors Permission

View Purchases Permission

View Sales Permission

View Samples Permission

View Sellers Permission

Application Settings

Permissions and Policies

Access Portfolio Manager Permission

Use the Access Portfolio Manager permission to specify whether users can open Portfolio Manager.

Location

In the **Navigation** pane, click **Applications** > **Portfolio Manager** > **Access Portfolio Manager**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Portfolio Manager Settings

Application Settings

Permissions and Policies

Feedback

Access Reports Permission

Use the Access Reports permission to specify whether users can display reports in Portfolio Manager.

Location

In the **Navigation** pane, click **Applications** > **Portfolio Manager** > **Access Reports**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Portfolio Manager Settings

Application Settings

Permissions and Policies

Feedback

Access Tools Permission

Use the Access Tools permission to specify whether users can use the tools in Portfolio Manager.

Location

In the **Navigation** pane, click **Applications** > **Portfolio Manager** > **Access Tools**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Portfolio Manager Settings

Application Settings

Permissions and Policies

Feedback

Add/Edit/Delete Buyers Permission

Use the Add/Edit/Delete Buyers permission to specify whether users can add, modify, and delete buyers in Portfolio Manager.

Location

In the **Navigation** pane, click **Applications** > **Portfolio Manager** > **Add/Edit/Delete Buyers**.

Scope

This permission is available for the following scopes:

- System

- Role
- User
- Branch

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Portfolio Manager Settings

Application Settings

Permissions and Policies

Feedback

Add/Edit/Delete Investors Permission

Use the Add/Edit/Delete Investors permission to specify whether users can add, modify, and delete investors in Portfolio Manager.

Location

In the **Navigation** pane, click **Applications** > **Portfolio Manager** > **Add/Edit/Delete Investors**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Portfolio Manager Settings

Application Settings

Permissions and Policies

Feedback

Add/Edit/Delete Purchases Permission

Use the Add/Edit/Delete Purchases permission to specify whether users can add, modify, and delete purchases in Portfolio Manager.

Location

In the **Navigation** pane, click **Applications** > **Portfolio Manager** > **Add/Edit/Delete Purchases**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Portfolio Manager Settings

Application Settings

Permissions and Policies

Feedback

Add/Edit/Delete Sales Permission

Use the Add/Edit/Delete Sales permission to specify whether users can add, modify, and delete sales in Portfolio Manager.

Location

In the **Navigation** pane, click **Applications** > **Portfolio Manager** > **Add/Edit/Delete Sales**.

Scope

This permission is available for the following scopes:

- System
- Role
- User

- Branch

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Portfolio Manager Settings

Application Settings

Permissions and Policies

Feedback

Add/Edit/Delete Samples Permission

Use the Add/Edit/Delete Samples permission to specify whether users can add, modify, and delete samples in Portfolio Manager.

Location

In the **Navigation** pane, click **Applications** > **Portfolio Manager** > **Add/Edit/Delete Samples**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Portfolio Manager Settings

Application Settings

Permissions and Policies

Feedback

Add/Edit/Delete Sellers Permission

Use the Add/Edit/Delete Sellers permission to specify whether users can add, modify, and delete sellers in Portfolio Manager.

Location

In the **Navigation** pane, click **Applications** > **Portfolio Manager** > **Add/Edit/Delete Sellers**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics
Search for a Permission or System Code

Portfolio Manager Settings

Application Settings

Permissions and Policies

Feedback

View Buyers Permission

Use the View Buyers permission to specify whether users can view buyers in Portfolio Manager.

Location

In the **Navigation** pane, click **Applications** > **Portfolio Manager** > **View Buyers**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics
Search for a Permission

Set a Permission and Policy

Portfolio Manager Settings

Application Settings

Permissions and Policies

Feedback

View Investors Permission

Use the View Investors permission to specify whether users can view investors in Portfolio Manager.

Location

In the **Navigation** pane, click **Applications** > **Portfolio Manager** > **View Investors**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics
Search for a Permission

Set a Permission and Policy

Portfolio Manager Settings

Application Settings

Permissions and Policies

Feedback

View Purchases Permission

Use the View Purchases permission to specify whether users can view purchases in Portfolio Manager.

Location

In the **Navigation** pane, click **Applications** > **Portfolio Manager** > **View Purchases**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics
Search for a Permission

Set a Permission and Policy

Portfolio Manager Settings

Application Settings

Permissions and Policies

Feedback

View Sales Permission

Use the View Sales permission to specify whether users can view sales in Portfolio Manager.

Location

In the **Navigation** pane, click **Applications** > **Portfolio Manager** > **View Sales**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics
Search for a Permission

Set a Permission and Policy

Portfolio Manager Settings

Application Settings

Permissions and Policies

Feedback

View Samples Permission

Use the View Samples permission to specify whether users can view samples in Portfolio Manager.

Location

In the **Navigation** pane, click **Applications** > **Portfolio Manager** > **View Samples**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics
Search for a Permission

Set a Permission and Policy

Portfolio Manager Settings

Application Settings

Permissions and Policies

Feedback

View Sellers Permission

Use the View Sellers permission to specify whether users can view sellers in Portfolio Manager.

Location

In the **Navigation** pane, click **Applications** > **Portfolio Manager** > **View Sellers**.

Scope

This permission is available for the following scopes:

- System

- Role
- User
- Branch

Policy

N/A

Related Topics
Search for a Permission

Set a Permission and Policy

Portfolio Manager Settings

Application Settings

Permissions and Policies

Reporting Console Settings

Reporting Console Settings

Use the Reporting Console permissions and policies to specify settings for Reporting Console.

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Access Reporting Console Permission

Manage Reporting Console Permission

View Reports Permission

Applications Permissions and Policies

Permissions and Policies

Access Reporting Console Permission

Use the Access Reporting Console permission to specify whether users can open Reporting Console.

Location

In the **Navigation** pane, click **Applications** > **Reporting Console** > **Access Reporting Console**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Reporting Console Settings

Application Settings

Permissions and Policies

Feedback

Manage Reporting Console Permission

Use the Manage Reporting Console permission to specify whether users can manage reports in Reporting Console. The actions include: exporting, importing, deleting, organizing, and renaming reports.

Location

In the **Navigation** pane, click **Applications** > **Reporting Console** > **Manage Reporting Console**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Reporting Console Settings

Application Settings

Permissions and Policies

Feedback

View Reports Permission

Use the View Reports permission to specify whether users can view reports in Reporting Console.

Location

In the **Navigation** pane, click **Applications** > **Reporting Console** > **View Reports**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

The policy allows your organization to specify what users can do in Reporting Console. Enable the permission for a scope and then select the Reporting Console permissions.

Permit the user to create snapshots of reports they have run: If selected, the user can create snapshots of reports the user runs.

Permit the user to view snapshots of reports created by other users: If selected, the user can view snapshots of reports other users created.

Restrict user to only execute the following reports: If selected, the user can run the specified reports only.

Reports: If you select a report, users can run it.

Select None: Clears all selected items in the list.

Select All: Selects all items in the list.

> **Tip**: To select multiple sequential reports, press and hold the **Shift** key and then click the first and last sequential report. To select multiple non-sequential reports, press and hold the **Ctrl** key and then click each individual report.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Reporting Console Settings

Application Settings

Permissions and Policies

Self Service Portal

Feedback

Self Service Portal

Use Self portal settings to specify permissions and policies, to enable a customer to configure a debtor self service portal to view account details/history, view/update personal/demographic data and schedule/make a payment.

Related Topics

Authentication

Configuration

Customization

Feedback

Authentication

Uses in the **Portal Registration** page.

Location

In the **Navigation** pane, click **Applications** > **Self Service Portal** > **Authentication**.

Scope

This permission is available for the following scopes:

- System
- Business Class
- Client Group
- Client

Policy

Options used at the time of Self Service Portal Registration

- The **policy** has 2 sections: **Account Information and Personal Information.**
- **Account Information contains the following fields:** Liquid Account Number and Customer Account Number.
- **Personal Information contains the following fields:** Name, Email, Address, SSN -n Complete, SSN - Last 4 Digits, Phone, DOB.
- At least one option needs to be selected from each section.

Feedback

Configuration

Uses **Configuration options** for the portal.

Location

In the **Navigation** pane, click **Applications** > **Self-Service Portal** > **Configuration**.

Scope

This permission is available for the following scopes:

- System
- Business Class
- Client Group
- Client

Policy

This policy can be used to configure what actions will be performed in self service portal.

a. Allow adding of demographic information by the user.

b. Allow editing of demographic information by the user.

c. Allow adding of phone numbers, consent, and call preferences/restrictions by the user.

d. Allow editing of phone numbers, consent, and call preferences/restrictions by the user.

e. Allow adding of email addresses and consent by the user.

f. Allow editing of email addresses and consent by the user.

g. Allow adding of new payment instruments via the portal.

h. Allow editing of existing payment instruments via the portal.

i. Allow deleting of existing payment instruments via the portal.

j. Allow establishment of payment plans via the portal.

k. Allow editing of established payment plans via the portal.

l. Allow processing of payments via the portal.

m. Allow uploading of documents via the portal.

- **E-sign Message :** This change will pop-up the message to users while creating a single payment or setting up a payment plan using a card. Users can only create the arrangement once they approve the message displayed.

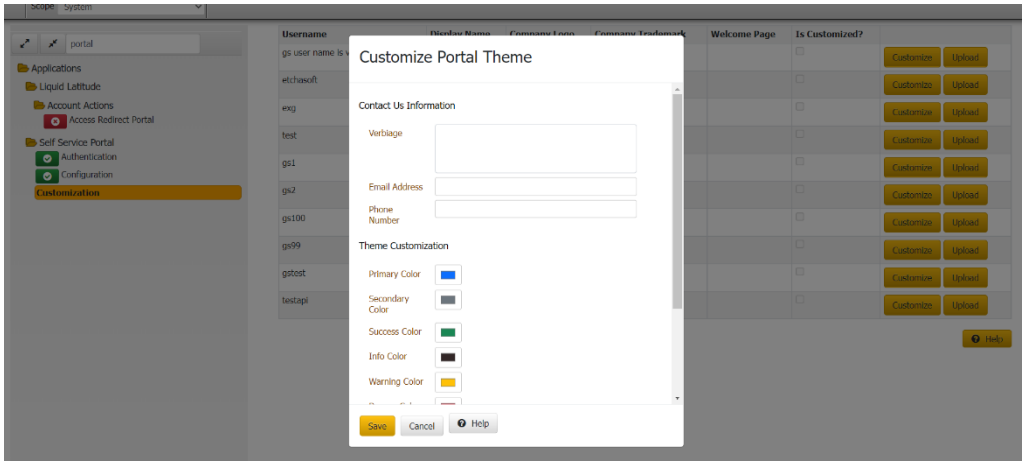
Feedback

Customization

Uses for Self portal customization.

- Displays list of users, any uploaded images for the user, and if the portal theme has been **Customization** for the user.
- **Customize popup** allows users to configure **Contact Us Information** (verbiage, email, and phone). This information will be visible in the portal only if one of the email addresses or phone numbers is configured.
- **Customize popup** also allows users to customize theme colors as below:

1. **Primary Color** is used to color Confirmation Buttons (Save, Add, Login, etc), Paging Buttons, Context Menu, Check boxes, Radio Buttons, Navigation Links, and Hyperlinks.
2. **Secondary Color** is used to color the Cancel/Close buttons.
3. S**uccess Color** is used as the success message backdrop after various actions in the application.
4. **Info Color** is used to color the headings of fields on each page.
5. **Warning Color** is used as the warning message backdrop on the Registration page.
6. **Danger Color** is used as the failure message backdrop after various actions in the application.
7. **Light Color** is used for the active/selected navigation menu item and as the default background color on each page.
8. **Dark Color** is used for unselected navigation menu items.
9. **Header and Footer Colors** are used to color the Header and Footer in the application.



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- **Upload popup** allows users to upload the Company Logo, Company Trademark, Background Image and Welcome Page for the Portal application. If not uploaded, Logo and Trademark will be blank in the application. Welcome Page is visible in Login, Registration and Home pages. Background image is visible as a background in all pages If Welcome Page & Background Image are not uploaded, a solid background of 'Light Color' will be displayed.
    1. Welcome Page: Width should not exceed 1300 px and height should not exceed 900 px
    2. Company Logo: Width should not exceed 200 px and height should not exceed 70 px
    3. Company Trademark: Width should not exceed 300 px and height should not exceed 50 px
    4. Background Image: Width should not exceed 1300 px and height should not exceed 900 px

Service Request Gateway Settings

Feedback

Service Request Gateway Settings

Use the Service Request Gateway settings to specify permissions and policies for Service Request Gateway (SRG). SRG allows users to request services from a service vendor, such as a credit reporting vendor, over a secure connection.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Access Quota Management Application Permission

Access SRG Module Installer Permission

Credit Report Requests Settings

Enable Service Request Gateway Permission

Application Settings

Permissions and Policies

Feedback

Access Quota Management Application Permission

Use the Access Quota Management Application permission to specify whether users can open the Quota Management program to define user and customer quotas.

Location

In the **Navigation** pane, click **Applications** > **Quota Management** > **Access Quota Management Application**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

The policy allows your organization to specify whether users can open the Quota Management program. Enable the permission for a scope and then specify the overrides.

Allow the user to temporarily add to or remove from a user's quota allotment for any product. Only valid for current period: If selected, allows the user to modify a user's quota allotment for the current period only.

Allow the user to temporarily add to or remove from a customer's quota allotment for any product. Only valid for current period: If selected, allows the user to modify a customer's quota allotment for the current period only.

Allow the user to view the audit of changes to quota allotments: If selected, allows the user to view the audit trail that shows changes to quota allotments.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Service Request Gateway Settings

Application Settings

Permissions and Policies

Feedback

Access SRG Module Installer Permission

Use the Access SRG Module Installer permission to specify whether users can use the SRG Module Installer to configure Service Request Gateway (SRG).

Location

In the **Navigation** pane, click **Applications** > **Service Request Gateway** > **Access SRG Module Installer**.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Service Request Gateway Settings

Application Settings

Permissions and Policies

Credit Report Requests Settings

Feedback

Credit Report Requests Settings

Use the Credit Report Requests settings to specify permissions and policies for credit report requests.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Access the Credit Report Request Wizard Permission

Allow Viewing of Credit Reports Permission

Credit Report Requests Settings Permission

Enable "One Off" Credit Report Requests Permission

Enable Overrides to Credit Report Request Settings Permission

Service Request Gateway Settings

Application Settings

Permissions and Policies

Feedback

Access the Credit Report Request Wizard Permission

Use the Access the Credit Report Request Wizard permission to specify whether users can use the Credit Report Request Wizard**.**

Location

In the **Navigation** pane, click **Applications** > **Service Request Gateway** > **Credit Report Requests** > **Access the Credit Report Request Wizard**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Credit Report Requests Permissions and Policies

Service Request Gateway Settings

Application Settings

Permissions and Policies

Feedback

Allow Viewing of Credit Reports Permission

Use the Allow Viewing of Credit Reports permission to specify whether users can view credit reports.

Location

In the **Navigation** pane, click **Applications** > **Service Request Gateway** > **Credit Report Requests** > **Allow Viewing of Credit Reports**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Business Class
- Client Group
- Client

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Credit Report Requests Permissions and Policies

Service Request Gateway Settings

Application Settings

Permissions and Policies

Feedback

Credit Report Requests Settings Permission

Use the Credit Report Requests Settings permission to configure general settings for credit report requests.

Location

In the **Navigation** pane, click **Applications** > **Service Request Gateway** > **Credit Report Requests** > **Credit Report Requests Settings**.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify general settings for credit report requests. Enable the permission for a scope and then specify the settings.

"One Off" time out period in seconds before user is prompted to wait or continue working: Number of seconds to wait after requesting a report before prompting the user to continue waiting or continue working.

Minimum number of days that must pass before next credit report request on an account: Minimum number of days after requesting a credit report for the user to wait before requesting another report.

Apply "minimum number of days" policy only to credit reports from same vendor: If selected, the "minimum number of days" policy applies to credit reports from the same vendor only.

Minimum balance on account to request credit report: Minimum account balance required for the user to request a credit report.

Maximum number of credit report requests per account: Maximum number of credit report requests allowed for each account.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Credit Report Requests Permissions and Policies

Service Request Gateway Settings

Application Settings

Permissions and Policies

Feedback

Enable "One Off" Credit Report Requests Permission

Use the Enable "One Off" Credit Report Requests permission to specify whether users can request a single credit report.

Location

In the **Navigation** pane, click **Applications** > **Service Request Gateway** > **Credit Report Requests** > **Enable "One Off" Credit Report Requests**.

Scope

This permission is available for the following scopes:

- System
- Role

- User
- Branch
- Business Class
- Client Group
- Client

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Credit Report Requests Permissions and Policies

Service Request Gateway Settings

Application Settings

Permissions and Policies

Feedback

Enable Overrides to Credit Report Request Settings Permission

Use the Enable Overrides to Credit Report Request Settings permission to specify whether users can override general settings for credit report requests.

Location

In the **Navigation** pane, click **Applications** > **Service Request Gateway** > **Credit Report Requests** > **Enable Overrides to Credit Report Request Settings**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

The policy allows your organization to override the general settings for credit report requests. Enable the permission for a scope and then specify the overrides.

Override minimum number of days that must pass before next credit report request on an account: If selected, allows the user to override the minimum number of days after requesting a credit report for the user to wait before requesting another report.

Override minimum balance on account to request credit report: If selected, allows the user to override the minimum account balance required for the user to request a credit report.

Override maximum number of credit report requests per account: If selected, allows the user to override the maximum number of credit report requests allowed for each account.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Credit Report Requests Permissions and Policies

Service Request Gateway Settings

Application Settings

Permissions and Policies

Feedback

Enable Service Request Gateway Permission

Use the Enable Service Request Gateway permission to specify whether your company can use Service Request Gateway (SRG) to request services from vendors. The default value points to an IIS server that Latitude uses (primarily for hosted clients). If you are not using Latitude in a hosted environment, set up an IIS server to host the service.

Location

In the **Navigation** pane, click **Applications** > **Service Request Gateway** > **Enable Latitude Service Request Gateway**.

Scope

This permission is available for the System scope only.

Policy

The SRG Module Installer populates these boxes for the Latitude server where your organization installed SRG. Enable the permission for a scope and then provide these values for each workstation where your organization installed SRG.

URL of the Service Request Gateway (SRG): Address of the SRG server.

Client Identifier authenticating with the SRG: Client ID for authenticating to the SRG server.

Password for authenticating with the SRG: Password for authenticating to the SRG server.

Password for configuring the SRG: Password for configuring SRG.

SRG Server Identifier: Tokenizer identity thumbprint.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Service Request Gateway Settings

Application Settings

Permissions and Policies

Web Access Settings

Feedback

Web Access Settings

Use the Web Access settings to specify permissions and policies for Web Access.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Account View Client Code Override Policy Permission

Website System Policy Permission

Website User Client Access Policy Permission

Website User Policy Permission

Application Settings

Permissions and Policies

Feedback

Account View Client Code Override Policy Permission

Use the Account View Client Code Override Policy permission to specify the report to display when viewing an account in Web Access. If your organization specified a default report in the Website User Policy Permission for a user or role, the report specified in this permission displays instead.

Location

In the **Navigation** pane, click **Applications** > **Web Access** > **Account View Client Code Override Policy**.

Scope

This permission is available for the following scopes:

- System
- Business Class
- Client Group
- Client

Policy

The policy allows your organization to specify the default report to display when viewing an account. Enable the permission for a scope and then specify the report.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Website User Policy Permission

Web Access Settings

Application Settings

Permissions and Policies

Feedback

Website System Policy Permission

Use the Website System Policy permission to specify the Web Access system administrator's email address. All system, client, and customer emails sent from Web Access go to this email address.

Location

In the **Navigation** pane, click **Applications** > **Web Access** > **Website System Policy**.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify the administrator's email address. Enable the permission for a scope and then type the administrator's email address.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Web Access Settings

Application Settings

Permissions and Policies

Feedback

Website User Client Access Policy Permission

Use the Website User Client Access Policy permission to specify the client and client groups available to Web Access users.

Location

In the **Navigation** pane, click **Applications** > **Web Access** > **Website User Client Access Policy**.

Scope

This permission is available for the following scopes:

- System

- Role
- User
- Branch

Policy

The policy allows your organization to specify the client and client groups available to Web Access users. Enable the permission for a scope and then select the client groups and clients.

Client Groups: If you select a client group, it's available to Web Access users.

Clients: If you select a client, it's available to Web Access users.

Select None: Clears all selected items in the list.

Select All: Selects all items in the list.

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

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Web Access Settings

Application Settings

Permissions and Policies

Feedback

Website User Policy Permission

Use the Website User Policy permission to specify the Web Access features available to a user or role.

Location

In the **Navigation** pane, click **Applications** > **Web Access** > **Website User Policy**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

The policy allows your organization to specify the Web Access features that are available to a user or role. Enable the permission for a scope and then specify the settings.

User Can Search for Customers: If selected, the user can search for accounts.

User Can View the Audit Logs: If selected, the user can view the audit trail for all user activities. We don't recommend that you set this policy for clients or customers because the logs contain user IP addresses.

User Can Add Notes to Customer Accounts: If selected, the user can add notes to accounts.

User Can Send a Message to Admin regarding Customer Accounts: If selected, the user can send an email message to the administrator regarding an account. The account number appears in the email subject line and the email goes to the email address specified in the Website System permission.

User Can Send a Message to the Administrator: If selected, the user can send an email message to the administrator. The email goes to the email address specified in the Website System permission.

User Can Add a Report: If selected, the user can add a report.

Send Admin an email when user logs into the website: If selected, Web Access sends an email message to the administrator when the user logs on to the website. The email goes to the email address specified in the Website System permission.

Echo email sent to user when they Add a Note or Send any Message: If selected, Web Access sends an email message to the user when the user adds a note to an account or sends an email message to the administrator.

User Can Upload and Download files to the Web Server: If selected, the user can upload files to and download files from the web server and also user can save upload location and download location for files.

Enter the Upload Location (FullPath): The User can add a upload file location path.

Enter the Download Location (FullPath): The User can add a download file location path.

Choose the report used for the Account View: Default report to display when viewing an account. If your organization enabled the Account View Customer Code Override Policy permission, the default report specified for that permission displays instead of the report specified here.

Choose the report used to return Search Results: Default report to display when viewing search results.

Reports: If you select a report, it's available to Web Access users.

Select None: Clears all selected items in the list.

Select All: Selects all items in the list.

> **Tip**: To select multiple sequential reports, press and hold the **Shift** key and then click the first and last sequential report. To select multiple non-sequential reports, press and hold the **Ctrl** key and then click each individual report.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Web Access Settings

Application Settings

Permissions and Policies

WorkFlow Settings

Feedback

WorkFlow Settings

Use the WorkFlow settings to specify permissions and policies for WorkFlow.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Manually Pause WorkFlow Permission

Manually Raise Event Permission

Manually Release WorkFlow Permission

Manually Resume WorkFlow Permission

Manually Start WorkFlow Permission

Manually Stop WorkFlow Permission

WorkFlow Engine Settings Permission

Application Settings

Permissions and Policies

Feedback

Manually Pause WorkFlow Permission

Use the Manually Pause WorkFlow permission to specify whether users can pause a workflow that is running on an account in WorkFlow.

Location

In the **Navigation** pane, click **Applications** > **WorkFlow** > **Manually Pause WorkFlow**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Business Class
- Client Group
- Client

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

WorkFlow Settings

Application Settings

Permissions and Policies

Feedback

Manually Raise Event Permission

Use the Manually Raise Event permission to specify whether users can raise an event on an account in WorkFlow.

Location

In the **Navigation** pane, click **Applications** > **WorkFlow** > **Manually Raise Event**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Business Class
- Client Group
- Client

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

WorkFlow Settings

Application Settings

Permissions and Policies

Feedback

Manually Release WorkFlow Permission

Use the Manually Release WorkFlow permission to specify whether users can release a parent workflow in WorkFlow that is waiting on a child workflow to complete, which allows the parent workflow to continue.

Location

In the **Navigation** pane, click **Applications** > **WorkFlow** > **Manually Release WorkFlow**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Business Class
- Client Group
- Client

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

WorkFlow Settings

Application Settings

Permissions and Policies

Feedback

Manually Resume WorkFlow Permission

Use the Manually Resume WorkFlow permission to specify whether users can resume a paused workflow for an account in WorkFlow.

Location

In the **Navigation** pane, click **Applications** > **WorkFlow** > **Manually Resume WorkFlow**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Business Class
- Client Group
- Client

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

WorkFlow Settings

Application Settings

Permissions and Policies

Manually Start WorkFlow Permission

Use the Manually Start WorkFlow permission to specify whether users can start a workflow on an account in WorkFlow.

Location

In the **Navigation** pane, click **Applications** > **WorkFlow** > **Manually Start WorkFlow**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Business Class
- Client Group
- Client

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

WorkFlow Settings

Application Settings

Permissions and Policies

Feedback

Manually Stop WorkFlow Permission

Use the Manually Stop WorkFlow permission to specify whether users can stop a workflow that is running on an account in WorkFlow.

Location

In the **Navigation** pane, click **Applications** > **WorkFlow** > **Manually Stop WorkFlow**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Business Class
- Client Group
- Client

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

WorkFlow Settings

Application Settings

Permissions and Policies

Feedback

WorkFlow Engine Settings Permission

Use the WorkFlow Engine Settings permission to specify settings for WorkFlow Engine.

Location

In the **Navigation** pane, click **Applications** > **WorkFlow** > **Latitude WorkFlow Engine Settings**.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify settings for WorkFlow Engine. Enable the permission for a scope and then specify the settings.

Execution Duration [min]: Maximum number of minutes WorkFlow Engine continues to run in a single session. WorkFlow Engine processes events and activities until the event queue is empty or it reaches the time limit set here.

Action Activities: Maximum number of accounts WorkFlow Engine can process when running action activities. This setting represents "batches" of account activity by type and prevents server process overload.

Condition Activities: Maximum number of accounts WorkFlow Engine can process when running condition activities.

Query Activities: Maximum number of accounts WorkFlow Engine can process when running query activities.

Switch Activities: Maximum number of accounts WorkFlow Engine can process when running switch activities.

Email Address: Email address of the person who is monitoring WorkFlow Engine activity.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

WorkFlow Settings

Application Settings

Permissions and Policies

Compliance Settings

Compliance Settings

Use the compliance settings to specify policies for enabling or disabling validation notice tracking and to prevent reporting to Credit Bureau, if validation notice period is incomplete for a specific debtor.

Related Topics

Validation Notice Settings

Prevent Credit Bureau Reporting Permission

Validation Notice Tracking Permission

Call Attempt and Conversation Limits Permission

If enabled the call conversations and call attempts can be accessed based on the policy.

Location

In the **Navigation** pane, click **Compliance** > **Validation Notice > Validation Notice Tracking**.

Scope

This permission is for System, Business Class, Client Group, and Client scopes.

Policy

It will enable or disable the call attempts and call conversation limits.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Warnings

Mail Return

View Contact Made

Validation Notice Settings

Validation Notice Settings

Use the validation notice settings to specify policies for enabling or disabling the validation notice tracking.

Related Topics

Prevent Credit Bureau Reporting Permission

Validation Notice Tracking Permission

Prevent Credit Bureau Reporting Policy

If enabled the Credit Reporting policy will prevent accounts being reported to the credit bureau, if the validation notice period for a specific debtor is not completed.

Location

In the **Navigation** pane, click **Compliance** > **Validation Notice > Prevent Credit Bureau Reporting**.

Scope

This permission is for System, Business Class, Client Group, and Client scopes.

Policy

It will prevent credit bureau reporting if the validation period is incomplete.

Validation Notice Tracking Policy

The system should be tracking whether the validation notice should be sent or not.

Location

In the **Navigation** pane, click **Compliance** > **Validation Notice > Validation Notice Tracking**.

Scope

This permission is for System, Business Class, Client Group, and Client scopes.

Policy

It will enable or disable the validation notice tracking

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Warnings

Mail Return

Validation Given

Configuration Settings

Configuration Settings

Use the Configuration settings to specify configuration permissions and policies for Latitude.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Delinquency Aging Bucket Labels Permission

Payment Processing Settings

Prevent Multiple Account Access Permission

SMTP Permission

Welcome Web Page Permission

Welcome Window Permission

Permissions and Policies

Prevent Multiple Account Access Permission

Use the Prevent Multiple Account Access permission to prevent users from accessing the same account simultaneously.

Location

In the **Navigation** pane, click **Configuration** > **Prevent Multiple Account Access**.

Scope

This permission is available for the System scope only.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Configuration Settings

Permissions and Policies

General Settings

Feedback

Delinquency Aging Bucket Labels Permission

Use the Delinquency Aging Bucket Labels permission to specify the labels to display for the delinquency aging buckets. For more information, see Delinquency Card.

Location

In the **Navigation** pane, click **Configuration** > **Delinquency Aging Bucket Labels**.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify the labels to display for the delinquency aging buckets. Enable the permission for a scope and then specify the label names and their values.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Delinquency Card

Configuration Settings

Permissions and Policies

Feedback

SMTP Permission

Use the SMTP permission to specify Simple Mail Transfer Protocol (SMTP) settings for email messages.

Location

In the **Navigation** pane, click **Configuration** > **SMTP**.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify the configuration used to send email messages through Simple Mail Transfer Protocol (SMTP). Enable the permission for a scope and then specify the email message settings at the system level.

SMTP Server: mailserver.domain_name

Port (0=default): If 0, use the default SMTP port of 25. Otherwise, specify the port number to use.

Connect Using Secure Sockets Layer: If selected, connects to the SMTP server using Secure Sockets Layer (SSL).

Authentication: The options are:

- **Anonymous** (default) = No authentication
- **Basic** = Provide a user name and password and select SSL
- **Integrated** = Use Windows authentication

User Name and Password: If you selected Basic Authentication, specify the user name and password to use.

Sender Domain: Domain address used for email messages (for example, collections.com).

Timeout[sec]: Number of seconds to wait when sending an email message before displaying a time-out message.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Configuration Settings

Permissions and Policies

General Settings

Feedback

Welcome Window Permission

Use the Welcome Window permission to specify settings for the Welcome window to display when logging on to Latitude.

Location

In the **Navigation** pane, click **Configuration** > **Welcome Window**.

Scope

This permission is available for all scopes.

Policy

The policy allows your organization to specify a window to display on the Latitude welcome page. Enable the permission for a scope and then specify the window information.

Assembly DLL Path: Assembly DLL path to the welcome window.

WCF Host Name: WCF host name.

WCF Host Port (495 = default): WCF host port.

Connect using Secure Sockets layer (SSL): If selected, connects to the welcome page using SSL.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Configuration Settings

Permissions and Policies

Feedback

Welcome Web Page Permission

Use the Welcome Web Page permission to specify settings for the webpage to display when logging on to Latitude. The address can point to a local HTML file or a hosted webpage. If using a hosted webpage, Latitude passes the database information and current user ID to the web server to permit displaying user-specific information.

Location

In the **Navigation** pane, click **Configuration** > **Welcome Web Page**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

The policy allows your organization to specify the address for the webpage to display as the background on the Latitude welcome page. Enable the permission for a scope and then specify the settings.

URL: Address of the HTML resource to display as the background on the Latitude welcome page. You can specify a different path for each scope.

Pass user credentials to web server: If selected, Latitude passes credentials to the web server when displaying the webpage.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Configuration Settings

Permissions and Policies

Payment Processing Settings

Feedback

Payment Processing Settings

Use the Payment Processing settings to specify permissions and policies for payment methods and payment spreads.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Configuration for Handling Broken Promises

Configuration for Handling NSFs/Reversals Permission

Deactivate Automatic Status and Queue Level Permission

Override Payment Spread Permission

Payment Method Fee Schedule Permission

Map a Payment Method to a Fee Schedule

Payment Spread Permission

Configuration Settings

Permissions and Policies

Feedback

Configuration for Handling Broken Promises Permission

Use the Configuration for Handling Broken Promises permission to specify the status and queue level to assign to accounts when customers break a promise.

Location

In the **Navigation** pane, click **Configuration** > **Payment Processing** > **Configuration for Handling Broken Promises**.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify the status and queue level to assign to accounts when customers break a promise. Enable the permission for a scope and then specify the settings.

Change Status and Qlevel: If selected, the system changes the account status and queue level when customers break promises.

Change Status to: Status to assign to accounts when processing broken promises.

Change Qlevel to: Queue level to assign to accounts when processing broken promises.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Payment Processing Settings

Configuration Settings

Permissions and Policies

Feedback

Configuration for Handling NSFs

Use the Configuration for Handling NSFs to specify the status and queue level to assign to accounts when importing NSF or payment reversals using Exchange. This permission has no effect on manual payment entries.

Location

In the **Navigation** pane, click **Configuration** > **Payment Processing** > **Configuration >>>> ORIGINAL //liquid/main_systest/products/documentation/source/Liquid_Latitude_Help/Configuration_for_Handling_NSFs_Reversals_Permission.htm#1 style="font-weight: bold;">Configuration for Handling NSFs/Reversals**.

==== THEIRS //liquid/latitude.2021r1_systest/products/documentation/source/Liquid_Latitude_Help/Configuration_for_Handling_NSFs.htm#1 for Handling NSFs/Reversals.
==== YOURS //desktop-m2mctqg_liquid_latitude.2022r1_systest/products/documentation/source/Liquid_Latitude_Help/Configuration_for_Handling_NSFs.htm for Handling NSFs.
<<<<

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify the status and queue level to assign to accounts when importing NSF or payment reversals using Exchange. Enable the permission for a scope and then specify the settings.

Change Status and Qlevel: If selected, the system changes the account status and queue level when importing accounts with NSF or payment reversals.

Change Status to: Status to assign to accounts when processing NSF or payment reversals.

Change Qlevel to: Queue level to assign to accounts when processing NSF or payment reversals.

Notes:

- The system does not change the queue level for accounts assigned to queue level "875."
- If you reopen a closed account that is linked and is not the link driver, the system changes the queue level from "998" to "875."

Change the status of future arrangements: If selected, the system assigns the specified status to future payment arrangements for accounts with NSF or payment reversals imported using Exchange.

Status for future arrangements: Status to assign to future payment arrangements for accounts with NSF or payment reversals imported using Exchange.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Payment Processing Settings

Configuration Settings

Permissions and Policies

Feedback

Deactivate Automatic Status and Queue Level Permission

Use the Deactivate Automatic Status and Queue Level permission to specify whether to prevent Latitude from changing the account status and queue levels automatically for arrangements. If you enable the permission, Collector doesn't change the account status and queue levels automatically. Instead, the account status and queue levels remain unchanged.

If you don't configure or enable the permission, Collector changes account status and queue levels automatically. If your organization configured the Configuration for Handling Broken Promises permission or the Configuration for Handling NSFs/Reversals permission, Collector changes account status and queue levels according to those configurations. Otherwise, Collector changes account status and queue levels according to the following table:

Account has...	Account Status	Queue Level	Status of Non-driver Linked Accounts	Queue Level of Non-driver Linked Accounts
Promises	PPA	820	PPA	875
Broken promise	ACT	010	ACT	875
No promises remaining	ACT	013	ACT	875
Post-dated check	PDC	820	PDC	875
No post-dated checks remaining	ACT	011	ACT	875
Bounced check with post-dated checks remaining	NSF	012	ACT	875
Bounced check with no post-dated checks remaining	NSF	019	ACT	875
Post-dated credit card	PCC	820	PCC	875
No post-dated credit cards remaining	ACT	010	ACT	875
Declined credit card	ACT	012	ACT	875
Declined credit with post-dated credit cards remaining	PCC	019	ACT	875

Location

In the **Navigation** pane, click **Configuration** > **Payment Processing** > **Deactivate Automatic Status and Queue Level**.

Scope

This permission is available for the System scope only.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Payment Processing Settings

Configuration Settings

Permissions and Policies

General Settings

Feedback

Override Payment Spread Permission

Use the Override Payment Spread permission to specify whether users can override the configured payment spread for linked account arrangements and specify the order in which to apply payments. For more information about the configured payment spread, see Payment Spread Permission. For more information about overriding the configured payment spread, see Override a Payment Spread.

Location

In the **Navigation** pane, click **Configuration** > **Payment Processing** > **Override Payment Spread**.

Scope

This permission is available for the following scopes:

- System
- Business Class
- Client Group
- Client

Policy

N/A

Related Topics

Map a Payment Method to a Fee Schedule

Search for a Permission or System Code

Map a Payment Method to a Fee Schedule

Set a Permission and Policy

Payment Processing Settings

Configuration Settings

Permissions and Policies

Feedback

Payment Method Fee Schedule Permission

Use the Payment Method Fee Schedule permission to associate payment methods with fee schedules. For more information, see Map a Payment Method to a Fee Schedule.

Location

In the **Navigation** pane, click **Configuration** > **Payment Processing** > **Payment Method Fee Schedule**.

Scope

This permission is available for the following scopes:

- System
- Business Class
- Client Group
- Client

Policy

The policy allows your organization to associate payment methods to fee schedules. Enable the permission for a scope and then specify the mappings.

Related Topics

Map a Payment Method to a Fee Schedule

Search for a Permission or System Code

Map a Payment Method to a Fee Schedule

Set a Permission and Policy

Payment Processing Settings

Configuration Settings

Permissions and Policies

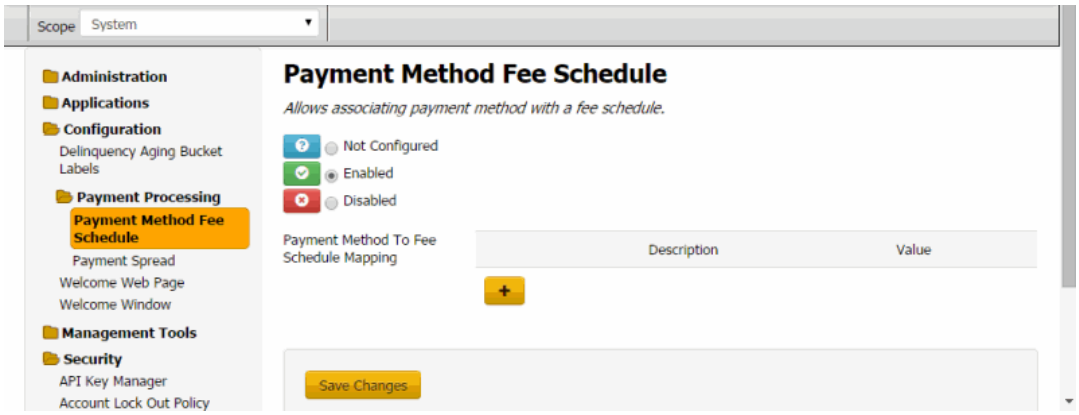
Feedback

Map a Payment Method to a Fee Schedule

Use the **Payment Fee Schedule** panel to map a payment method to a fee schedule. You must have the appropriate permissions to map payment methods. For more information, see Payment Method Fee Schedule Permission.

To map a payment method to a fee schedule

1. In the **Navigation** pane, click **Configuration** > **Payment Processing** > **Payment Method Fee Schedule**.



Description: Unique code that identifies the fee schedule.

Value: Payment method (for example, credit card, check, money order) to associate to the fee schedule.

Note: The text you type in the **Value** box must match exactly to an existing payment method that your organization set up in the Payment Methods system code.

2. Click the plus sign (+). A blank row appears in the data grid.
3. Complete the information and then click **Save Changes**.

Note: To modify a mapping, type a new value in the appropriate box. To delete a mapping, click the Delete icon.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Payment Method Fee Schedule Permission

Payment Methods

Payment Processing Settings

Configuration Settings

Permissions and Policies

Payment Spread Permission

Use the Payment Spread permission to specify settings for how to spread payments across linked accounts.

Location

In the **Navigation** pane, click **Configuration** > **Payment Processing** > **Payment Spread**.

Scope

This permission is available for the following scopes:

- System
- Business Class
- Client Group
- Client

Policy

The policy allows your organization to specify how the system spreads payments across linked accounts. Enable the permission for a scope and then specify the settings.

Payment Spread Method: Method for spreading payments across linked accounts. Valid values are:

- **Spread payments in order of the customer priority:** The system applies payments to the linked accounts based on how you prioritized the payments for each customer, starting with the highest priority. If you assigned the same priority to accounts, the system applies the payments proportionally.

- **Spread payments evenly over each account:** The system divides the payments and applies an equal amount to each linked account.

- **Spread payments according to their fees:** The system applies payments to the highest yielding linked account first, based on the balance and fee schedule.

- **Spread payments over each account in the specified order:** The system sorts the linked accounts according to the order you specify in the **Sort Field 1** through **Sort Field 4** and **Sort Field 1 Order** through **Sort Field 4 Order** policies in this permission and then applies the payments in that order.

- **Spread payments over each account proportionally by current balance:** The system applies payments to each linked account based on the amount owed in relation to the total balance of all the linked accounts listed. The system divides the amount owed for an account by the total balance for the combined accounts to get a percent. The system multiplies the payment by that percent and applies the result to that account.

  For example, the total balance for the three accounts shown in the example is 3,217.47.

- **First Account:** Divide 250 (the balance for the first account) by 3,217.47 to get .08. If the payment amount is $200, multiply 0.08 by 200 to get 16. The system applies $16 of the $200 payment to the first account.

- **Second Account:** Divide 967.47 (the balance for the second account) by 3,217.47 to get 0.30. Multiply 0.30 by 200 to get 60. The system applies $60 of the $200 payment to the second account.

- **Third Account:** Divide 2,000 (the balance for the third account) by 3,217.47 to get 0.62. Multiply 0.62 by 200 to get 124. The system applies $124 of the $200 payment to the third account. 16 + 60 + 124 = 200.

- **Spread payments in order of the Fee Schedule Bucket priority and then in the specified order:** The system applies payments to the linked accounts according to the money bucket priory set for the fee schedule and the order you specify in the **Sort Field 1** through **Sort Field 4** and **Sort Field 1 Order** through **Sort Field 4 Order** policies in this permission. The system sorts the accounts according to the sort policies specified. The system applies the payment to the priority 1 bucket of the first account in the sorted list, until the balance in that bucket is zero or no funds remain to apply. If funds remain, the system applies the payment to the priority 1 bucket of the next account in the sorted list until the balance in that bucket is zero or no funds remain to apply. If funds remain after applying the payment to the priority 1 buckets for all the linked accounts, the system begins applying the remaining funds to the priority 2 buckets in the same manner. The system continues applying the payment until no funds remain to apply or all linked account balances are zero.

  Sort Field 1: First field by which to sort accounts when applying payments.

  Sort Field 1 Order: Order in which to sort the data in the field specified in **Sort Field 1**.

  Sort Field 2: Second field by which to sort accounts when applying payments.

  Sort Field 2 Order: Order in which to sort the data in the field specified in **Sort Field 2**.

  Sort Field 3: Third field by which to sort accounts when applying payments.

  Sort Field 3 Order: Order in which to sort the data in the field specified in **Sort Field 3**.

  Sort Field 4: Fourth field by which to sort accounts when applying payments.

  Sort Field 4 Order: Order in which to sort the data in the field specified in **Sort Field 4**.

Note: If you specify more than one sort field, the system sorts the accounts by the first field specified. Within that sort order, the system then sorts the accounts by the second field specified. The system continues sorting in this manner for any subsequent sort fields specified. After sorting the accounts, the system applies payments to the accounts beginning with the first account in the sorted list.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Payment Processing Settings

Configuration Settings

Permissions and Policies

SAML 2.0

Feedback

SMTP Permission

Use the SMTP permission to specify Simple Mail Transfer Protocol (SMTP) settings for email messages.

Location

In the **Navigation** pane, click **Configuration** > **SMTP**.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify the configuration used to send email messages through Simple Mail Transfer Protocol (SMTP). Enable the permission for a scope and then specify the email message settings at the system level.

SMTP Server: mailserver.domain_name

Port (0=default): If 0, use the default SMTP port of 25. Otherwise, specify the port number to use.

Connect Using Secure Sockets Layer: If selected, connects to the SMTP server using Secure Sockets Layer (SSL).

Authentication: The options are:

- **Anonymous** (default) = No authentication
- **Basic** = Provide a user name and password and select SSL
- **Integrated** = Use Windows authentication

User Name and Password: If you selected Basic Authentication, specify the user name and password to use.

Sender Domain: Domain address used for email messages (for example, collections.com).

Timeout[sec]: Number of seconds to wait when sending an email message before displaying a time-out message.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Configuration Settings

Permissions and Policies

General Settings

Feedback

SAML Settings and Configuration

Uses to Configure SAML 2.0.

Location

In the **Navigation** pane, click **Configuration** > **SAML 2.0 > SAML Settings and Configuration**

Scope

This permission is available for the System scope only.

Policy

- Single Sign On URL. where it redirects the user for Authentication.
- To identify the IDP, the “Identify provider issuer” is imported.
- The IDP functions in two ways, by authenticating the user either handshake or post method.
- X509 certificate, provided by IDP. This serves as an E-Certificate for authentication between the service provider and liquid or latitude.
- The SAML username, is the username that IDP passes. This username must be an e-mail, but if you select SAML username it is important that the user table already has the SAML username populated for every user, otherwise the user cannot be mapped.
- Corresponding IDP attribute name is Username that must be provided from IDP which can be EMAIL/SAML username/Latitude username.

Digital Communication

Digital Communication

Use Digital Communication to specify permission and policies for Email and SMS Communication.

Related Topics

Allow_Attachments.htm

Allow_Sending_Email.htm

Allow_Sending_SMS.htm

Consider_Email_as_Attempt.htm

Consider_Email_as_Bad.htm

Consider_Email_as_Contact.htm

Consider_Email_as_Worked.htm

Consider_SMS_as_Attempt.htm

Consider_SMS_as_Bad.htm

Consider_SMS_as_Contact.htm

Consider_SMS_as_Worked.htm

Gateway_Configuration_for_Email.htm

Gateway_Configuration_for_SMS.htm

Email

Allow Inbound Attachments

Allow users to configure path to save attachments.

Location

In the **Navigation** pane, click **Digital Communicatio**n > **Email** > **Allow Inbound Attachments**.

Scope

This permission is available for the System scope only.

Policy

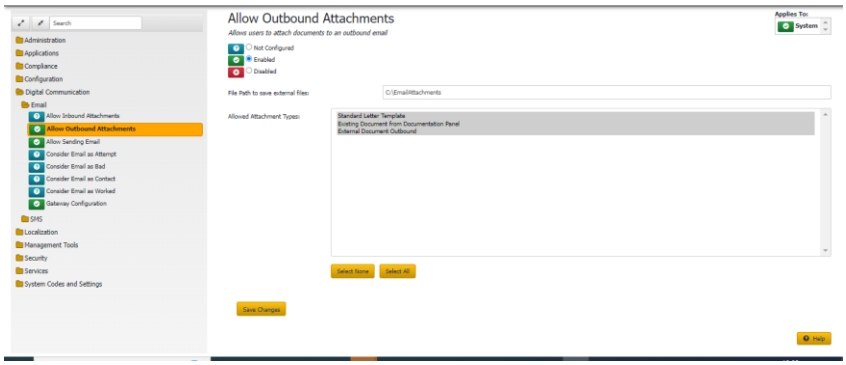
Attachments from the Emails are saved in a folder configured by the client using the "Allow Inbound Attachments" permission. The attachments for each inbound Email can be viewed in the communication reference folder.

Allow Outbound Attachments

In this permission, user can select one or more Attachment Types that can be sent as an attachment in an outbound email. User can also configure a file path to store external files, which needs to be mentioned if External Document Outbound is selected in Allowed Attachment Types.

Location

In the **Navigation** pane, click **Digital Communicatio**n > **Email** > **Allow outbound Attachments**.



Scope

This permission is available for the **System, Client, Role,** and **User** scopes.

Policy

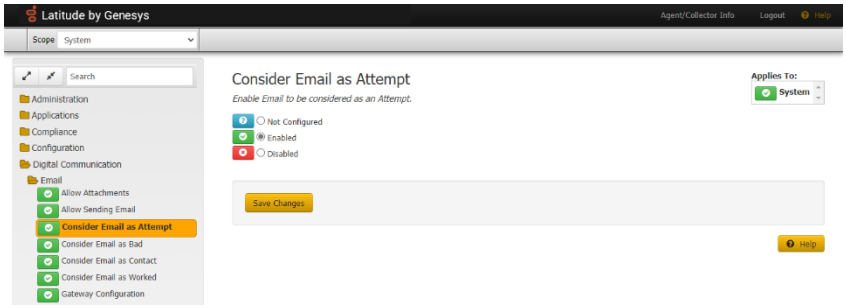
When sending an outbound email, you have an option to select attachments (if "**Allow Outbound Attachments**" is configured).

Consider Email as Attempt

Enable Email to be considered as an Attempt.

Location

In the **Navigation** pane, click **Digital Communicatio**n > **Email** > **Consider Email as Attempt.**



Scope

This permission is available for the System scope only.

Policy

This is also added as a new option under State Restriction Setting. Sending an email is considered as an attempt. Number of attempts in Compliance panel are incremented if this is enabled.

Related Topics

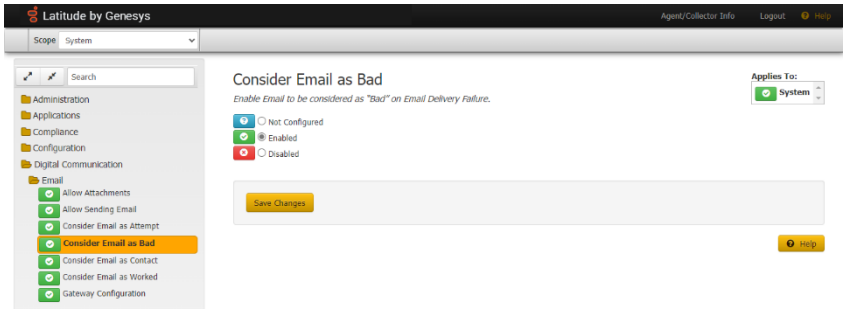
Modify_a_State_Restriction.htm

Consider Email as Bad

Enable Email to be considered as "Bad" on Email Delivery Failure.

Location

In the **Navigation** pane, click **Digital Communicatio**n > **Email** > **Consider Email as Bad.**



Scope

This permission is available for the System, Client, Client Group, Business Class scope.

Policy

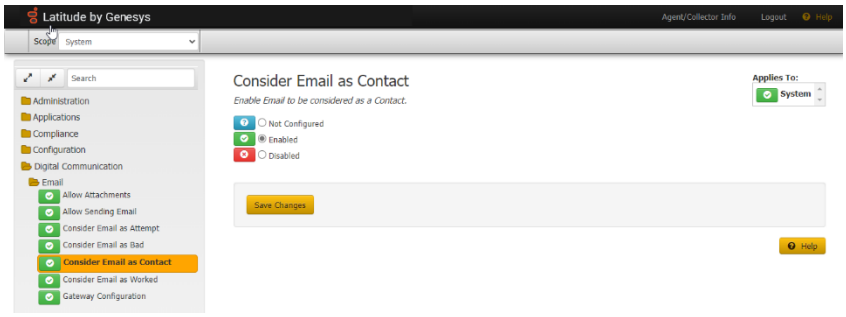
Set the corresponding Email address as Bad if the permission Consider Email as Bad is enabled.

Consider Email as Contact

Enable Email to be considered as Contact.

Location

In the **Navigation** pane, click **Digital Communicatio**n > **Email** > **Consider Email as Contact**



Scope

This permission is available for the System scope only.

Policy

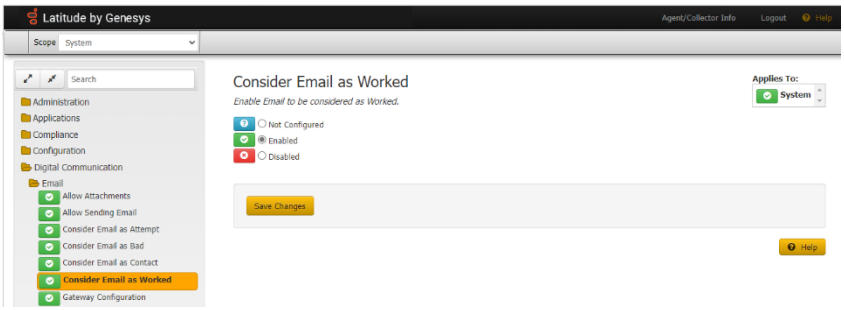
This is also added as a new option under state Restriction Setting. Sending an Email is considered as a contact and number of contacts in Compliance panel are incremented if this is enabled.

Consider Email as Worked

Enable Email to be considered as Worked.

Location

In the **Navigation** pane, click **Digital Communicatio**n > **Email** > **Consider Email as Worked.**



Scope

This permission is available for the System, client level, Client, Client Group, Business Class Scope.

Policy

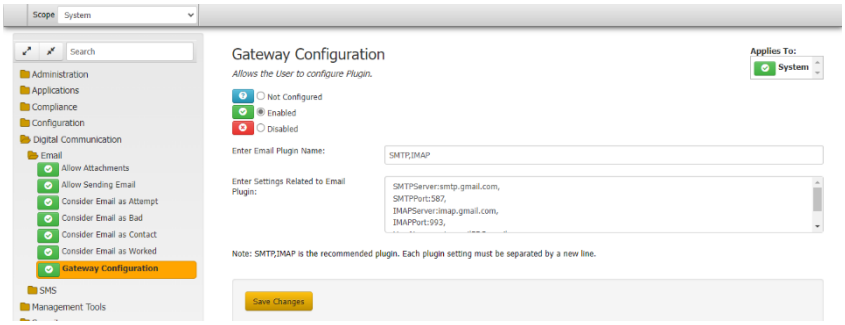
Sending an Email as worked if this is enabled.

Gateway Configuration for Email

Allows the user to configure plugin.

Location

In the **Navigation** pane, click **Digital Communicatio**n > **Email** > **Gateway Configuration.**



Scope

This permission is available for the System, client, Client Group, Business Class Scope.

Policy

Gateway Configuration defined at System and Client Scope.

The Plugins used to send and receive Emails is configured here. **SMTP** and **IMAP** are recommended plugins. Each plugin setting must be separated by new line.

Enter Email Plugin Name: GenesysCloud,IMAP

Enter Settings Related to Email Plugin:

DialerAPI:https://api.usw2.pure.cloud/

ClientID:75af5ad1-16f9-4798-bbc1-2b86a429fe92

ClientSecret:bEB55QBoYf-iUZv0MOoam-6jQqf0F0n5gNce2-Q5uOI

RedirectURL:https://login.usw2.pure.cloud/oauth/token

FromEmail:www.debtsoftware.com'>latitude@www.debtsoftware.com

FromName:Latitude

IMAPServer:imap.gmail.com,

IMAPPort:993,

UserName:testmail06202022@gmail.com,

Password:usvjuncffroenhbs,

- Once this configuration is saved, now if the user creates a communication request of type email, then while sending the email, Genesys Clould plugin will be used.

- User can add genesys email for an account from email reference panel.
- User will not be able to provide any attachments as Genesys cloud doent provide the apis to add attachment to the email but email without attachment can be sent.
- After adding email, user can raise a communication request of type email, and from pending requests user can select email type request and click on send Email will be sent.

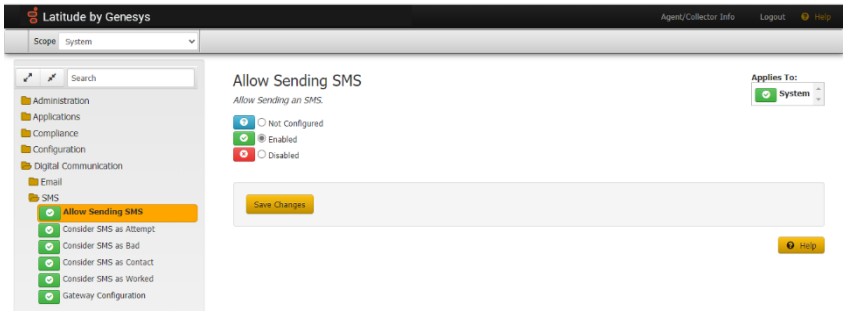
SMS

Allow Sending SMS

Allow users to send an SMS.

Location

In the **Navigation** pane, click **Digital Communicatio**n > **SMS**> **Allow Sending SMS**



Scope

This permission is available for the System, Client , Role and User scopes.

Policy

SMS is sent only if this is enabled

SMS Send Limit

Allows users to set a limit on the number of messages to be sent to a phone number per day and week.

Scope

This permission is available for the System, Client , Role and User scopes.

Policy

Max Number of messages per day: values to set for the messages to be sent.

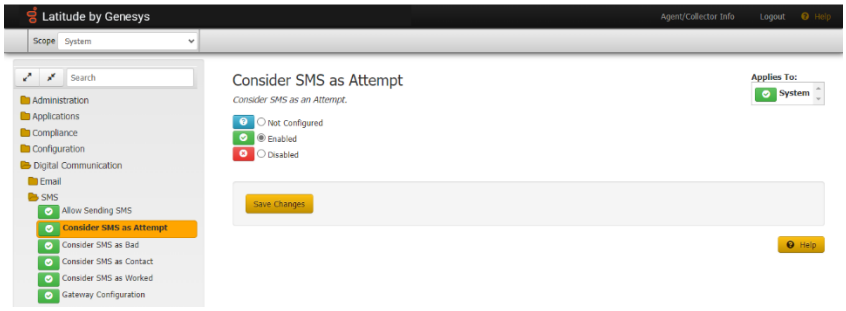
Max Number of messages per week: Value to set for the messaged to be sent

Consider SMS as Attempt

Enable SMS to be considered as an Attempt.

Location

In the **Navigation** pane, click **Digital Communicatio**n > **SMS** > **Consider SMS as Attempt.**



Scope

This permission is available for the System scope only.

Policy

Sending an SMS is considered as an attempt. Number of attempts in Compliance panel are incremented if this is enabled.

Related Topics

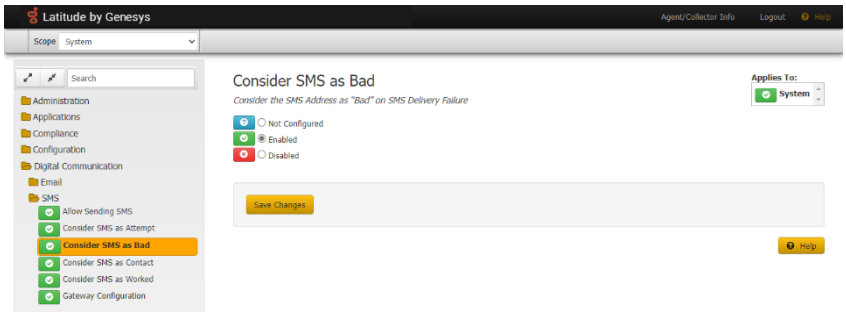
Modify_a_State_Restriction.htm

Consider SMS as Bad

Enable SMS to be considered as "Bad" on SMS Delivery Failure.

Location

In the **Navigation** pane, click **Digital Communicatio**n > **SMS** > **Consider SMS as Bad.**



Scope

This permission is available for the System, Client, Client Group, Business Class scope.

Policy

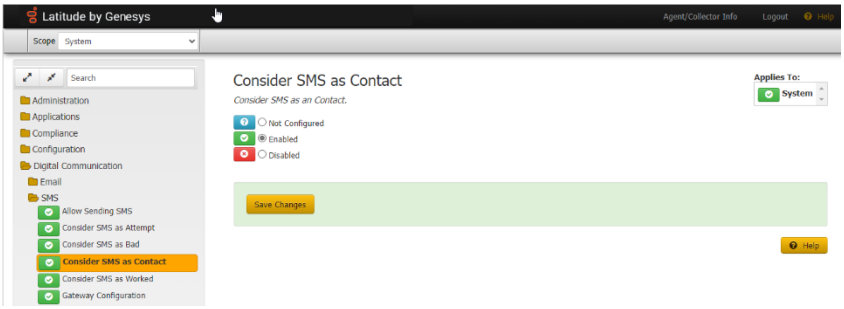
Set the corresponding SMS address as Bad if the permission Consider SMS as Bad is enabled.

Consider SMS as Contact

Enable SMS to be considered as Contact.

Location

In the **Navigation** pane, click **Digital Communicatio**n > **SMS** > **Consider SMS as Contact.**



Scope

This permission is available for the System scope only.

Policy

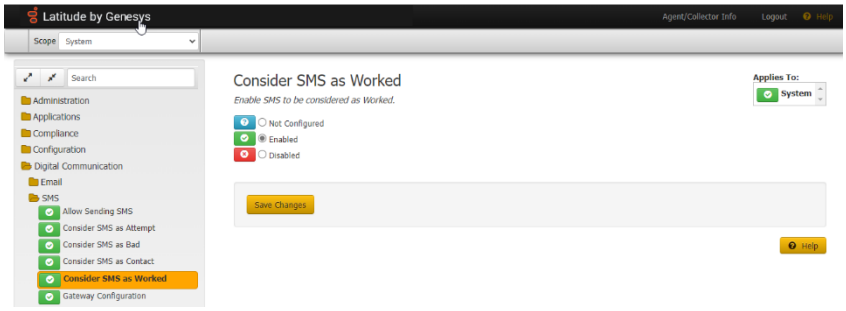
Sending an SMS is considered as a contact and number of contacts in Compliance panel are incremented if this is enabled.

Consider SMS as Worked

Enable SMS to be considered as Worked.

Location

In the **Navigation** pane, click **Digital Communicatio**n > **SMS** > **Consider SMS as Worked.**



Scope

This permission is available for the System, client level, Client, Client Group, Business Class Scope.

Policy

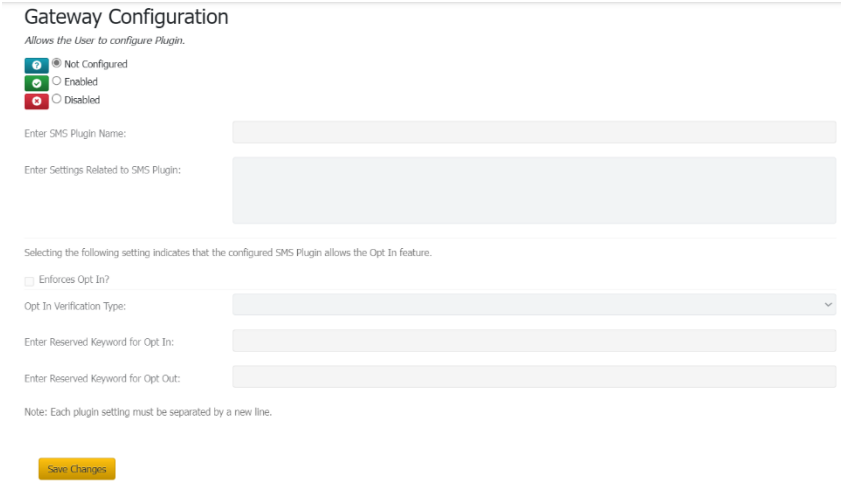
Sending an SMS as worked if this is enabled.

Gateway Configuration for SMS

Allows the user to configure plugin.

Location

In the **Navigation** pane, click **Digital Communicatio**n > **SMS** > **Gateway Configuration.**



Scope

This permission is available for the System, client, Client Group, Business Class Scope.

Policy

Gateway Configuration defined at System and Client Scope. The Plugins used to send and receive SMS is configured here. Each plugin setting must be separated by new line.

- **Enforces Opt In?** - Indicates if the configured SMS Plugin allows the Opt In feature
- **Opt In Verification Type** - Verification types defined by the SMS vendor for Opt In

- **Enter Reserved Keyword for Opt In** - Keyword reserved for Opt In of the phone number
- **Enter Reserved Keyword for Opt Out** - Keyword reserved for Opt Out of the phone number

1.

Localization

Localization

Use Localization to specify permission and policies which modifies the date format, phone number format using the country code.

Related Topics

Account_Data

Currency_Symbol_Format_Settings

User_Interface

Language_Pack_Selection_for_UI

Account Data

Feedback

Account Data

Use **Account Data** settings for **account related settings.**

Related Topics

Currency_Symbol_Fomat_Settings

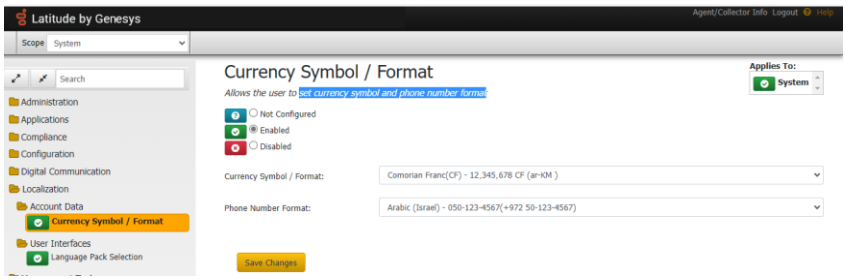
Feedback

Currency Symbol/Format Settings

Uses to set currency symbol and phone number format.

Location

In the **Navigation** pane, click **Administration** > **Localization** > **Account Data** > **Currency Symbol/Format Settings.**



Scope

- System
- Business Class
- Client
- Client Group

Policy

Settings Applicable for this are:

- Currency symbol and currency formatting.
- Default phone number formatting.

Related Topics
Account_Data

User_Interface

Language_Pack_Selection_for_UI

User Interface

Feedback

User Interface

Use **User Interface** settings for **User** perspective.

Related Topics
Language_Pack_Selection_for_UI

Localization Settings(Date&Time)

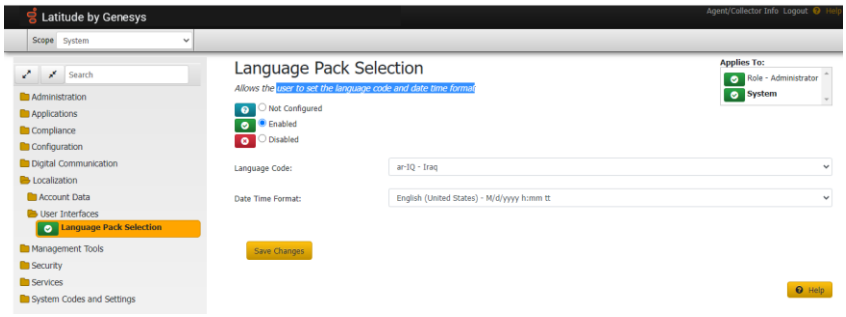
Feedback

Language Pack Selection for UI

Uses to set the language code and date time format.

Location

In the **Navigation** pane, click **Administration** > **Localization** > **User Interface** > **Language Pack Selection for UI.**



Scope

- User
- Role
- Branch Level
- System Level

Policy

Settings applicable for this are:

- Language pack selection for UI.
- Localization setting for the display of dates and times (currently in General Settings / Localization).

Account_Data

Currency_Symbol_Format_Settings

User_Interface

Management Tool Settings

Feedback

Management Tool Settings

Use the Management Tools settings to specify permissions and policies for management tools.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Accounting Settings

Access Credit Reporting Wizard Permission

Access Custodian Editor Permission

Access Dialer Config Permission

Access Goal Manager Permission

Archive Settings

Letter Console Settings

Link Console Settings

Payment Entry Settings

Query Designer Settings

Permissions and Policies

Accounting Settings

Accounting Settings

Use the Accounting settings to specify permissions and policies for the Invoices and Overpayment Manager programs.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Access Invoices Program Permission

Access Overpayment Manager Permission

Enter AR Payments Permission

Enter Bank Transactions Permission

Generate Invoices Permission

Generate Statements Permission

Print Checks Permission

Management Tool Settings

Permissions and Policies

Access Invoices Program Permission

Use the Access Invoices Program permission to specify whether users can open the Invoices program.

Location

In the **Navigation** pane, click **Management Tools** > **Accounting** > **Access Invoices Program**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Accounting Settings

Management Tool Settings

Permissions and Policies

Feedback

Access Overpayment Manager Permission

Use the Access Overpayment Manager Program permission to specify whether users can open Overpayment Manager.

Location

In the **Navigation** pane, click **Management Tools** > **Accounting** > **Access Overpayment Manager Program**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Business Class
- Client Group

- Client

Policy

The policy allows users to add refunds and transfers using Overpayment Manager. Enable the permission for a scope and then specify the settings.

Allow the user to edit this selection criteria (for viewing only): If selected, the user can select or clear the **Maximum Amount** and **Invoiced Only** check boxes in Overpayment Manager to display or hide overpaid transactions.

Allow refund/transfer of overpayments on uninvoiced payments: If selected, the user can refund or transfer overpayment amounts not invoiced yet.

Maximum amount of overpayment allowed for refund/transfer: Maximum amount users can refund or transfer.

Allow refund of PU overpayments to the customer: If selected, the user can create refund checks on overpayment amounts for PU (paid us) transaction types.

Allow refund of PA overpayments to the customer: If selected, the user can create refund checks on overpayment amounts for PA (paid agency) transaction types.

Allow refund of PC overpayments to the customer: If selected, the user can create refund checks on overpayment amounts for PC (paid client) transaction types.

How many days must pass before allowing a refund of overpayment to the customer: Time to wait before granting a refund. Latitude uses this value with the value in the **How many days must pass before allowing a transfer of overpayment to another account** box.

Minimum amount of overpayment refund to the customer: Minimum amount users can refund.

Allow transfer of PU overpayments to another account: If selected, the user can transfer funds on overpayment amounts for PU (paid us) transaction types.

Allow transfer of PA overpayments to another account: If selected, the user can transfer funds on overpayment amounts for PA (paid agency) transaction types.

Allow transfer of PC overpayments to another account: If selected, the user can transfer funds on overpayment amounts for PC (paid client) transaction types.

How many days must pass before allowing a transfer of overpayment to another account: Time to wait before granting a fund transfer. Latitude uses this value with the value in the **How many days must pass before allowing a refund of overpayment to the debtor** box.

Minimum amount of an overpayment transfer to another account: Minimum amount users can transfer.

Have the Overpayment Manager application create a check when the batch is created: If selected, Latitude creates a check record for the refund. Process the batch or delete the check. You can print the check from the **Check Register** in the Invoices program.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Accounting Settings

Management Tool Settings

Permissions and Policies

Feedback

Enter AR Payments Permission

Use the Enter AR Payments permission to specify whether users can add accounts receivable payment information to apply toward client invoices in the Invoices program.

Location

In the **Navigation** pane, click **Management Tools** > **Accounting** > **Enter AR Payments**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Business Class
- Client Group
- Client

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Accounting Settings

Management Tool Settings

Permissions and Policies

Feedback

Enter Bank Transactions Permission

Use the Enter Bank Transactions permission to specify whether users can add bank transaction information for trust accounts using the Invoices program.

Location

In the **Navigation** pane, click **Management Tools** > **Accounting** > **Enter Bank Transactions**.

Scope

This permission is available for the following scopes:

- System
- Role

- User
- Branch
- Business Class
- Client Group
- Client

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Accounting Settings

Management Tool Settings

Permissions and Policies

Feedback

Generate Invoices Permission

Use the Generate Invoices permission to specify whether users can create client invoices using the Invoices program.

Location

In the **Navigation** pane, click **Management Tools** > **Accounting** > **Generate Invoices**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Business Class
- Client Group
- Client

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Accounting Settings

Management Tool Settings

Permissions and Policies

Feedback

Generate Statements Permission

Use the Generate Statements permission to specify whether users can create account statements using the Invoices program.

Location

In the **Navigation** pane, click **Management Tools** > **Accounting** > **Generate Statements**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Business Class
- Client Group
- Client

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Accounting Settings

Management Tool Settings

Permissions and Policies

Feedback

Print Checks Permission

Use the Print Checks permission to specify whether users can print checks using the Invoices program.

Location

In the **Navigation** pane, click **Management Tools** > **Accounting** > **Print Checks**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Accounting Settings

Management Tool Settings

Permissions and Policies

Feedback

Access Credit Reporting Wizard Permission

Use the Access Credit Reporting Wizard permission to specify whether users can open the Credit Bureau Reporting Wizard to create a file to send to a credit bureau.

Location

In the **Navigation** pane, click **Management Tools** > **Credit Reporting Wizard** > **Access Credit Reporting Wizard**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Management Tool Settings

Permissions and Policies

Feedback

Access Custodian Editor Permission

Use the Access Custodian Editor permission to specify whether users can configure end-of-day processing tasks in Custodian.

Location

In the **Navigation** pane, click **Management Tools** > **Custodian** > **Access Custodian Editor**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Management Tool Settings

Permissions and Policies

Feedback

Access Dialer Config Permission

Use the Access Dialer Config permission to specify whether users can open Dialer Configuration to create and modify dialer campaigns.

Location

In the **Navigation** pane, click **Management Tools** > **Dialer Config** > **Access Dialer Config**.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Management Tool Settings

Permissions and Policies

Feedback

Access Goal Manager Permission

Use the Access Goal Manager permission to specify whether users can open Goals Manager to view statistics for collectors, supervisors, managers, and owners.

Location

In the **Navigation** pane, click **Management Tools** > **Goals** > **Access Goals Manager**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Management Tool Settings

Permissions and Policies

Archive Settings

Feedback

Archive Settings

Use the Archive settings to specify permissions and policies for archiving and restoring account data.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Access Archive/Restore Functionality Permission

Enable Archive of Account Data Permission

Management Tool Settings

Permissions and Policies

Feedback

Access Archive/Restore Functionality Permission

Use the Access Archive/Restore Functionality permission to specify whether users can archive accounts and restore archived accounts.

Location

In the **Navigation** pane, click **Management Tools** > **Archive** > **Access Archive/Restore Functionality**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

The policy allows your organization to specify which archive functionality is available. Enable the permission for a scope and then select the archive permissions.

Allow user to run Archive Configuration application: If selected, allows the user to run the Archive Configuration program.

Allow user to run Archive/Restore application: If selected, allows the user to run the Archive/Restore program.

Allow user to edit archive relationship: If selected, allows the user to modify the archive relationship.

Allow user to archive account data: If selected, allows the user to archive account data.

Allow user to restore archived data: If selected, allows the user to restore archived data.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Archive Settings

Management Tool Settings

Permissions and Policies

Feedback

Enable Archive of Account Data Permission

Use the Enable Archive of Account Data permission to specify whether Latitude can archive account data.

Location

In the **Navigation** pane, click **Management Tools** > **Archive** > **Enable Archive of Account Data**.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify which archive processes are available. Enable the permission for a scope and then select the archive process permissions.

Minimum number of months after an account is returned before allowing archive: Minimum number of months after returning an account that must pass before the user can archive the account.

Add note to account after it has been archived: If selected, Latitude adds a note to the account after archiving it.

Log archive operations to ArchiveHistory table: If selected, Latitude logs archive operations to the Archive History table.

Synchronize archive table schema before every archive/restore operation: If selected, Latitude synchronizes table schema before every archive or restore operation. If cleared, users synchronize the schema using the Archive Configuration tool.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Archive Settings

Management Tool Settings

Permissions and Policies

Audit

Feedback

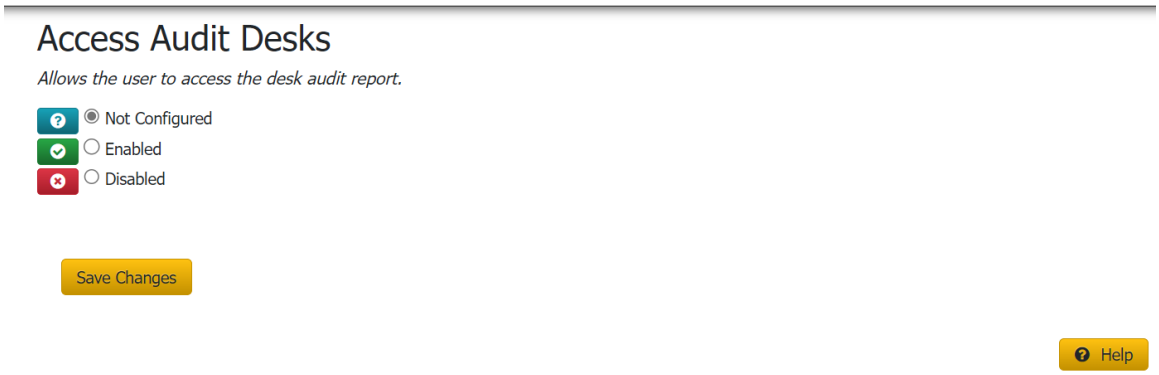
Audits

Allows the user to access the desk audit report.

Access Audit Desk

User can access the audit screen from Navigation page. It allows users with permission "Access Audit Desk" to look at accounts that have been worked by users showing number, name, customer Time On/Off, elapsed time, viewed, worked, and contacted for a certain date and either by a user or a desk selected.

User can open the account by clicking on the row in the results section.



Letter Console Settings

Feedback

Letter Console Settings

Use the Letter Console settings to specify permissions and policies for Letter Console.

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Access Letter Console Permission

Change Settings Permission

Create/Delete Permission

Merge Using Microsoft Word Permission

Management Tool Settings

Permissions and Policies

Feedback

Access Letter Console Permission

Use the Access Letter Console permission to specify whether users can open Letter Console to print and modify letters.

Location

In the **Navigation** pane, click **Management Tools** > **Letter Console** > **Access Letter Console**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Letter Console Settings

Management Tool Settings

Permissions and Policies

Feedback

Change Settings Permission

Use the Change Settings permission to specify whether users can modify letter settings in Letter Console.

Location

In the **Navigation** pane, click **Management Tools** > **Letter Console** > **Change Settings**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Letter Console Settings

Management Tool Settings

Permissions and Policies

Feedback

Create/Delete Permission

Use the Create/Delete permission to specify whether users can create and delete letters in Letter Console.

Location

In the **Navigation** pane, click **Management Tools** > **Letter Console** > **Create/Delete**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Letter Console Settings

Management Tool Settings

Permissions and Policies

Feedback

Merge Using Microsoft Word Permission

Use the Merge Using Microsoft Word permission to specify whether users can use Microsoft Word to modify letter templates in Letter Console without having to download, edit, and then upload them. You must have Microsoft Word installed to use this feature. For more information about modifying letter templates using Word, see "Modify a Letter Template Using Microsoft Word" in the Letter Console documentation.

Note: If you disable this permission or don't configure it, you must download the letter template, modify it, and then upload it back to Letter Console. For more information, see "Modify a Letter Template" in the Letter Console documentation.

Location

In the **Navigation** pane, click **Management Tools** > **Letter Console** > **Merge Using Microsoft Word**.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Letter Console Settings

Management Tool Settings

Permissions and Policies

Link Console Settings

Feedback

Link Console Settings

Use the Link Console settings to specify permissions and policies for Link Console.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Access Link Console Permission

Link Accounts Permission

Management Tools Permissions and Policies

Permissions and Policies

Feedback

Access Link Console Permission

Use the Access Link Console permission to specify whether users can open Link Console to modify automatic account linking settings.

Location

In the **Navigation** pane, click **Management Tools** > **Link Console** > **Access Link Console**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Link Console Settings

Management Tool Settings

Permissions and Policies

Feedback

Link Accounts Permission

Use the Link Accounts permission to specify whether users can use Link Console to link accounts manually that belong to the same party.

Location

In the **Navigation** pane, click **Management Tools** > **Link Console** > **Link Accounts**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Link Console Settings

Management Tool Settings

Permissions and Policies

Payment Entry Settings

Payment Entry Settings

Use the Payment Entry settings to specify permissions and policies for viewing and managing payments in Latitude Console. For more information, see the *Latitude Console* documentation.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Access Payment Entry Permission

Remove Other Users Batch Locks Permission

Management Tool Settings

Permissions and Policies

Access Payment Entry Permission

Use the Access Payment Entry permission to specify whether users can open the **Payment Entry** window in Latitude Console.

Location

In the **Navigation** pane, click **Management Tools** > **Payment Entry** > **Access Payment Entry**.

Scope

This permission is available for all scopes.

Policy

The policy allows users to specify the settings for adding payments. Enable the permission for a scope and then specify the settings.

Allow payments to be entered on closed accounts: If selected, allows the user to add payments to closed accounts.

Warn when allowing payments to be entered on closed accounts: If selected, displays a warning when the user adds a payment to closed accounts.

Allow opening of other users batches: If selected, allows the user to open payment batches that other users created.

Allow adding payments to other users batches: If selected, allows the user to add payments to payment batches that other users created.

Allow processing of batches: If selected, allows the user to process payment batches.

Allow processing of other users batches: If selected, allows the user to process payment batches that other users created.

Allow editing of other users batches: If selected, allows the user to modify payment batches that other users created.

Allow deleting of other users batches: If selected, allows the user to delete payment batches that other users created.

Allow editing of other users batch items: If selected, allows the user to modify payment batch items that other users created.

Allow deleting of other users batch items: If selected, allows the user to delete payment batch items that other users created.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Payment Entry Settings

Management Tool Settings

Permissions and Policies

Feedback

Remove Other Users Batch Locks Permission

Use the Remove Other Users Batch Locks permission to specify whether users can unlock payment batches that other users locked in Latitude Console.

Location

In the **Navigation** pane, click **Management Tools** > **Payment Entry** > **Remove Other Users Batch Locks**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Payment Entry Settings

Management Tool Settings

Permissions and Policies

Query Designer Settings

Feedback

Query Designer Settings

Use the Query Designer settings to specify permissions and policies for querying accounts.

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

User Restrictions by Conditions Permission

Access Condition Builder Permission

Access Custom Queue Manager Permission

Access List Builder Permission

Access Management Suite Extension Wizard Permission

CBR Requester Settings

Desk Mover Settings

Letter Requester Settings

Restrict Conditions Permission

Status Changer Settings

Use Literal Conditions Permission

Management Tool Settings

Permissions and Policies

Account Analysis Settings

Feedback

Account Analysis Settings
Use the Account Analysis settings to specify permissions and policies for Account Analysis.

Related Topics

Account Analysis

Access Account Analysis Permission

Query Designer Settings

Management Tool Settings

Permissions and Policies

Feedback

Access Custom Queue Manager Permission

Use the Access Custom Queue Manager permission to specify whether users can open Custom Queue Manager to maintain custom queues.

Location

In the **Navigation** pane, click **Management Tools** > **Query Designer** > **Custom Queue Manager** > **Access Custom Queue Manager**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Query Designer Settings

Management Tool Settings

Permissions and Policies

Feedback

Access Account Analysis Permission

Use the Access Account Analysis permission to specify whether users can open Account Analysis to change desk assignments.

Location

In the **Navigation** pane, click **Management Tools** > **Query Designer > Account Analysis>Access Account Analysis.**

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Account Analysis Settings

Search for a Permission or System Code

Set a Permission and Policy

Query Designer Settings

Management Tool Settings

Permissions and Policies

Create System level Queries Permission

Use the system level Queries permission to provide the ability to create queries managed at the system level and not owned by a specific user.

Location

In the **Navigation** pane, click **Management Tools** > **Query Designer > Account Analysis>Create System level Queries Permission.**

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Related Topics

Account Analysis Settings

Search for a Permission or System Code

Set a Permission and Policy

Query Designer Settings

Management Tool Settings

Permissions and Policies

Feedback

User Restrictions by Conditions Permission (Account Analysis)

Use the User Restrictions by Conditions permission to restrict the accounts that the user can modify using Account Analysis.

Location

In the **Navigation** pane, click **Management Tools** > **Query Designer** > **Account Analysis** > **User Restrictions by Conditions**.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

The policy allows your organization to limit the accounts that the user can modify using the Account Analysis tool. Enable the permission for a scope and then specify the conditions.

Restrict Accounts that can be modified using conditions?: If selected, allows you to restrict the accounts that the user can modify using the Account Analysis tool.

Conditions: Conditions for which accounts the user cannot modify using the Account Analysis tool. You set conditions in the same way as when you use the Condition Builder tool.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Query Designer Settings

Management Tool Settings

Permissions and Policies

Feedback

Access Management Suite Extension Wizard Permission

Use the Access Management Suite Extension Wizard permission to specify whether users can open the Management Suite Extension Wizard to create a query for accomplishing a specific task.

Location

In the **Navigation** pane, click **Management Tools** > **Query Designer** > **Extension Wizard** > **Access Latitude Management Suite Extension Wizard**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Query Designer Settings

Management Tool Settings

Permissions and Policies

CBR Requester Settings

CBR Requester Settings

Use the CBR Requester settings to specify permissions and policies for Credit Report Requester.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Access CBR Requester Permission

Services Settings

User Restrictions by Conditions Permission

Query Designer Permissions and Policies

Management Tools Permissions and Policies

Permissions and Policies

Access CBR Requester Permission

Use the Access CBR Requester permission to specify whether users can open Credit Report Requester to request credit bureau reports.

Location

In the **Navigation** pane, click **Management Tools** > **Query Designer** > **CBR Requester** > **Access CBR Requester**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

CBR Requester Settings

Query Designer Settings

Management Tool Settings

Permissions and Policies

Multiple CBRs permission

Use the Multiple CBRs permission to specify whether users can request multiple Credit Reports or not.

Location

In the **Navigation** pane, click **Management Tools** > **Query Designer** > **CBR Requester** > **Multiple CBRs Requester**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

CBR Requester Settings

Query Designer Settings

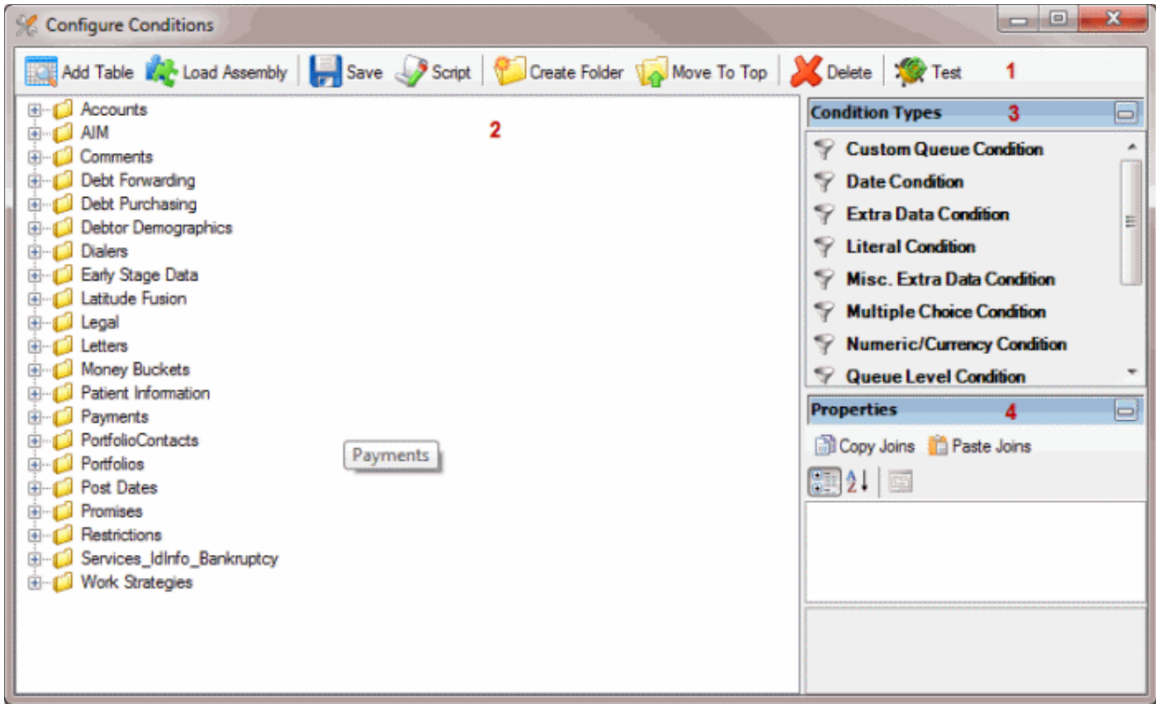
Management Tool Settings

Permissions and Policies

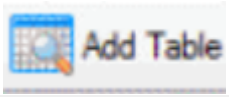
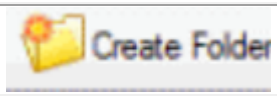
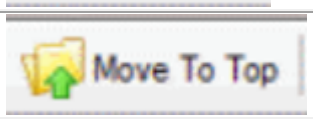
Condition Builder

Condition Builder

Use condition Builder to maintain the list of conditions, users can select when creating queries using a query tool. you must have the Configure Query Designer Permission.



1. **Toolbar** : Provides options for configuring conditions.

Options	Description
	Opens the Add Table Wizard to allow you to map a Latitude database table or view.
	Adds a .dll assembly file containing conditions that Latitude by Genesys created for your organization.
	Saves the condition configuration.
	Allows you to create a SQL files that contains the specified conditions.
	Allows you to create a folder in the condition Selection.
	Allows you to move a folder or condition.
	Allows you to move a delete or condition.
	Allows you to test a condition to ensure its configured properly.

2. **Condition Selection Pane:** Provides a list of conditions that are available to users when they create queries. You can add, modify, configure the conditions.
3. **Condition Type pane:** Allows you to add a condition type to the Data Selection pane.(In condition types , Number is marked as 3. There a new condition type is added.)
4. **Properties pane:** Allows you to view and modify the configuration settings for the condition selected in the Data Selection.

Feedback

Access List Builder Permission

Use the Access List Builder permission to specify whether users can open List Builder to create dialer call lists from List Builder query results.

Location

In the **Navigation** pane, click **Management Tools** > **Query Designer** > **List Builder** > **Access List Builder**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Query Designer Settings

Management Tool Settings

Permissions and Policies

Services Settings

Feedback

Services Settings

Use the Services settings to specify permissions for requesting credit bureau reports using Credit Report Requester.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Equifax DTEC Permission

Equifax Finders Permission

Equifax Full Permission

Experian Collect Permission

Experian Full Permission

Experian SSN Search Permission

TransUnion DTEC Permission

TransUnion Fact Permission

TransUnion Full Permission

CBR Requester Settings

Query Designer Settings

Management Tool Settings

Permissions and Policies

Equifax DTEC Permission

Use the Equifax DTEC permission to specify whether users can request an Equifax DTEC (SSN) report using Credit Report Requester.

Location

In the **Navigation** pane, click **Management Tools** > **Query Designer** > **CBR Requester** > **Services** > **Equifax DTEC**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Services Settings

CBR Requester Settings

Query Designer Settings

Management Tool Settings

Permissions and Policies

Feedback

Equifax Finders Permission

Use the Equifax Finders permission to specify whether users can request an Equifax Finders report using Credit Report Requester.

Location

In the **Navigation** pane, click **Management Tools** > **Query Designer** > **CBR Requester** > **Services** > **Equifax Finders**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Services Settings

CBR Requester Settings

Query Designer Settings

Management Tool Settings

Permissions and Policies

Feedback

Equifax Full Permission

Use the Equifax Full permission to specify whether users can request an Equifax full credit report using Credit Report Requester.

Location

In the **Navigation** pane, click **Management Tools** > **Query Designer** > **CBR Requester** > **Services** > **Equifax Full**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Services Settings

CBR Requester Settings

Query Designer Settings

Management Tool Settings

Permissions and Policies

Feedback

Experian Collect Permission

Use the Experian Collect permission to specify whether users can request an Experian collection report using Credit Report Requester.

Location

In the **Navigation** pane, click **Management Tools** > **Query Designer** > **CBR Requester** > **Services** > **Experian Collect**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Services Settings

CBR Requester Settings

Query Designer Settings

Management Tool Settings

Permissions and Policies

Feedback

Experian Full Permission

Use the Experian Full permission to specify whether users can request an Equifax full credit report using Credit Report Requester.

Location

In the **Navigation** pane, click **Management Tools** > **Query Designer** > **CBR Requester** > **Services** > **Experian Full**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Services Settings

CBR Requester Settings

Query Designer Settings

Management Tool Settings

Permissions and Policies

Feedback

Experian SSN Search Permission

Use the Experian SSN Search permission to specify whether users can request an Experian SSN search report using Credit Report Requester.

Location

In the **Navigation** pane, click **Management Tools** > **Query Designer** > **CBR Requester** > **Services** > **Experian SSN Search**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Services Settings

CBR Requester Settings

Query Designer Settings

Management Tool Settings

Permissions and Policies

Feedback

TransUnion DTEC Permission

Use the TransUnion DTEC permission to specify whether users can request an TransUnion DTEC (SSN) report using Credit Report Requester.

Location

In the **Navigation** pane, click **Management Tools** > **Query Designer** > **CBR Requester** > **Services** > **TransUnion DTEC**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Services Settings

CBR Requester Settings

Query Designer Settings

Management Tool Settings

Permissions and Policies

TransUnion Fact Permission

Use the TransUnion Fact permission to specify whether users can request an TransUnion fact report using Credit Report Requester.

Location

In the **Navigation** pane, click **Management Tools** > **Query Designer** > **CBR Requester** > **Services** > **TransUnion Fact**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Services Settings

CBR Requester Settings

Query Designer Settings

Management Tool Settings

Permissions and Policies

Feedback

TransUnion Full Permission

Use the TransUnion Full permission to specify whether users can request an TransUnion full credit report using Credit Report Requester.

Location

In the **Navigation** pane, click **Management Tools** > **Query Designer** > **CBR Requester** > **Services** > **TransUnion Full**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Services Settings

CBR Requester Settings

Query Designer Settings

Management Tool Settings

Permissions and Policies

Feedback

User Restrictions by Conditions Permission (CBR Requester)

Use the User Restrictions by Conditions permission to restrict the accounts for which the user can request a credit bureau report using Credit Report Requester.

Location

In the **Navigation** pane, click **Management Tools** > **Query Designer** > **CBR Requester** > **Services** > **User Restrictions by Conditions**.

Scope

This permission is available for the following scopes:

- System
- Role

- User
- Branch

Policy

N/A

The policy allows your organization to limit the accounts for which the user can request a credit bureau report using the Credit Report Requester tool. Enable the permission for a scope and then specify the conditions.

Restrict Accounts that can be modified using conditions?: If selected, allows you to restrict the accounts for which the user can request a credit bureau report using the Credit Report Requester tool.

Conditions: Conditions for which accounts the user cannot request a credit bureau report using the Credit Report Requester tool. You set conditions in the same way as when you use the Condition Builder tool.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

CBR Requester Settings

Query Designer Settings

Management Tool Settings

Permissions and Policies

Desk Mover Settings

Desk Mover Settings

Use the Desk Mover settings to specify permissions and policies for Desk Mover.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Access Desk Mover Permission

User Restrictions by Conditions Permission

Query Designer Settings

Management Tool Settings

Permissions and Policies

Access Desk Mover Permission

Use the Access Desk Mover permission to specify whether users can open Desk Mover to change desk assignments.

Location

In the **Navigation** pane, click **Management Tools** > **Query Designer** > **Desk Mover** > **Access Desk Mover**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Desk Mover Settings

Query Designer Settings

Management Tool Settings

Permissions and Policies

Feedback

User Restrictions by Conditions Permission (Desk Mover)

Use the User Restrictions by Conditions permission to restrict the accounts that the user can move to another desk using Desk Mover.

Location

In the **Navigation** pane, click **Management Tools** > **Query Designer** > **Desk Mover** > **User Restrictions by Conditions**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

The policy allows your organization to limit the accounts that the user can move to another desk using the Desk Mover tool. Enable the permission for a scope and then specify the conditions.

Restrict Accounts that can be modified using conditions?: If selected, allows you to restrict the accounts that the user can move to another desk using the Desk Mover tool.

Conditions: Conditions for which accounts the user cannot move to another desk. You set conditions in the same way as when you use the Condition Builder tool.

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Desk Mover Settings

Query Designer Settings

Management Tool Settings

Permissions and Policies

Letter Requester Settings

Letter Requester Settings
Use the Letter Requester settings to specify permissions and policies for Letter Requester.

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Access Letter Requester Permission

SIF Letters Permission

User Restrictions by Conditions Permission

Query Designer Settings

Management Tool Settings

Permissions and Policies

Access Letter Requester Permission
Use the Access Letter Requester permission to specify whether users can open Letter Requester to request letters.

Location

In the **Navigation** pane, click **Management Tools** > **Query Designer** > **Letter Requester** > **Access Letter Requester**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Letter Requester Settings

Query Designer Settings

Management Tool Settings

Permissions and Policies

SIF Letters Permission

Use the SIF Letters permission to specify whether users can create Settled in Full (SIF) letter requests using Letter Requester.

Location

In the **Navigation** pane, click **Management Tools** > **Query Designer** > **Letter Requester** > **SIF Letters**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Letter Requester Settings

Query Designer Settings

Management Tool Settings

Permissions and Policies

User Restrictions by Conditions Permission (Letter Requester)

Use the User Restrictions by Conditions permission to restrict the accounts for which the user can request a letter using Letter Requester.

Location

In the **Navigation** pane, click **Management Tools** > **Query Designer** > **Letter Requester** > **User Restrictions by Conditions**.

Scope

This permission is available for the following scopes:

- System

- Role
- User
- Branch

Policy

N/A

The policy allows your organization to limit the accounts for which the user can request a letter using the Letter Requester tool. Enable the permission for a scope and then specify the conditions.

Restrict Accounts that can be modified using conditions?: If selected, allows you to restrict the accounts for which the user can request a letter using Letter Requester.

Conditions: Conditions for which accounts the user cannot request a letter using Letter Requester. You set conditions in the same way as when you use the Condition Builder tool.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Letter Requester Settings

Query Designer Settings

Management Tool Settings

Permissions and Policies

Feedback

Restrict Conditions Permission

Use the Restrict Conditions permission to specify the conditions available to the user in Query Designer.

Location

In the **Navigation** pane, click **Management Tools** > **Query Designer** > **Restrict Conditions**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

The policy allows your organization to limit the number of conditions that are available to users. Enable the permission for a scope and then specify the conditions to allow. Conditions appear alphabetically within their folders.

Restrict user to only allow the following conditions: If selected, users can select the specified conditions only when using Query Designer.

Conditions: If selected, the condition is available to users.

Select None: Clears all selected items in the list.

Select All: Selects all items in the list.

> **Tip**: To select multiple sequential conditions, press and hold the **Shift** key and then click the first and last sequential condition. To select multiple non-sequential conditions, press and hold the **Ctrl** key and then click each individual condition.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Query Designer Settings

Management Tool Settings

Permissions and Policies

Status Changer Settings

Status Changer Settings

Use the Status Changer settings to specify permissions and policies for Status Changer.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Access Status Changer Permission

User Restrictions by Conditions Permission

Query Designer Settings

Management Tool Settings

Permissions and Policies

Access Status Changer Permission

Use the Access Status Changer permission to specify whether users can open Status Changer to change the status of a group of accounts.

Location

In the **Navigation** pane, click **Management Tools** > **Query Designer** > **Status Changer** > **Access Status Changer**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Status Changer Settings

Query Designer Settings

Management Tool Settings

Permissions and Policies

Feedback

User Restrictions by Conditions Permission (Status Changer)

Use the User Restrictions by Conditions permission to restrict the accounts for which users can change the status using Status Changer.

Location

In the **Navigation** pane, click **Management Tools** > **Query Designer** > **Status Changer** > **User Restrictions by Conditions**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

The policy allows your organization to limit the accounts for which the user can change the status using the Status Changer tool. Enable the permission for a scope and then specify the conditions.

Restrict Accounts that can be modified using conditions?: If selected, allows you to restrict the accounts for which the user can change the status using Status Changer.

Conditions: Conditions that limit the accounts for which the user cannot change the status using Status Changer. You set conditions in the same way as when you use the Condition Builder tool.

Related Topics
Search for a Permission or System Code

Set a Permission and Policy

Status Changer Settings

Query Designer Settings

Management Tool Settings

Permissions and Policies

Feedback

Use Literal Conditions Permission

Use the Use Literal Conditions permission to specify whether users can create a condition in Query Designer called "Literal Condition" and specify a block of SQL to use instead of the predefined conditions.

Location

In the **Navigation** pane, click **Management Tools** > **Query Designer** > **Use Literal Conditions**.

Scope

This permission is available for all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Query Designer Settings

Management Tool Settings

Permissions and Policies

Script Builder Settings

Script Builder Settings

Use the Script Builder settings to specify permissions and policies for Scripts and Script Queries.

Related Topics

Access Script Builder Permission

Access Script Builder Permission

Use the Access Script Builder permission to specify whether users can create, view, modify, and delete the scripts.

Location

In the **Navigation** pane, click **Management Tools** > **Script Builder** > **Access Script Builder**.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Related Topics
Script Builder

Script Query Conditions

Scripts

Application Log

Feedback

Application Log

Use the Application Log to view,display, all system level events and can be filtered by user and event type. Also filter print and export non-account level events.

Feedback

Access Application Log

Use the **Access Application Log** permission specify the user to use the application log activity.

Location

In the **Navigation** pane, click **Management Tools** > **Application Log** > **Access Application Log**

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

NA

Security Settings

Feedback

Security Settings

Use the Security settings to specify permissions and policies for locking user accounts and managing user passwords.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Account Lockout Permission

API Key Manager

Password Complexity Permission

Password Expiration Permission

Permissions and Policies

Feedback

Account Lockout Permission

Use the Account Lockout permission to specify the settings for locking a user's account when the user's attempt to log on to Latitude is unsuccessful.

Location

In the **Navigation** pane, click **Security** > **Account Lock Out Policy**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

The policy allows your organization to specify settings for unsuccessful logon attempts. Enable the permission for a scope and then specify the settings.

Maximum unsuccessful attempts: Maximum number of unsuccessful logon attempts allowed before Latitude locks the user account.

Duration of account lockout (min): Length of time in minutes that the account remains locked after an unsuccessful logon attempt.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Security Settings

Permissions and Policies

API Key Manager

Feedback

API Key Manager

You can generate and assign API keys to users to allow them to use the Latitude Web Service without requiring a user name and password in a configuration file. When a user sends a request to the Web Service using a valid API key, the system logs all activity to the user associated to that key. For example, external developers can send requests from their web application to query the Latitude Web Service for account information. Examples of external applications include web services, Windows services, desktop applications, and anything else that can send an HTTP request to access the Latitude Web Service.

Location

In the **Navigation** pane, click **Security** > **API Key Manager**.

Scope

This permission is available for the system scope only.

Policy

N/A

Related Topics

Add an API Key

Revoke an API Key

Security Settings

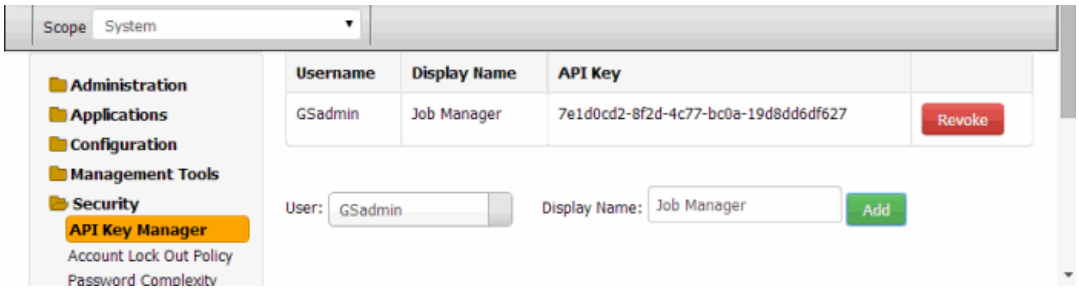
Feedback

Add an API Key

Use the **API Key Manager** panel to generate and assign an API key to a user.

To add an API key

1. In the **Navigation** pane, click **Security** > **API Key Manager**.



User: Latitude User ID to assign to the API key.

Display Name: Name that identifies the API key assignment for internal reference. For example, you can use the display name to identify where to use the key.

2. Complete the information and then click **Add**. The system assigns a unique API key to the user and adds it to the data grid.

Related Topics

API Key Manager

Security Settings

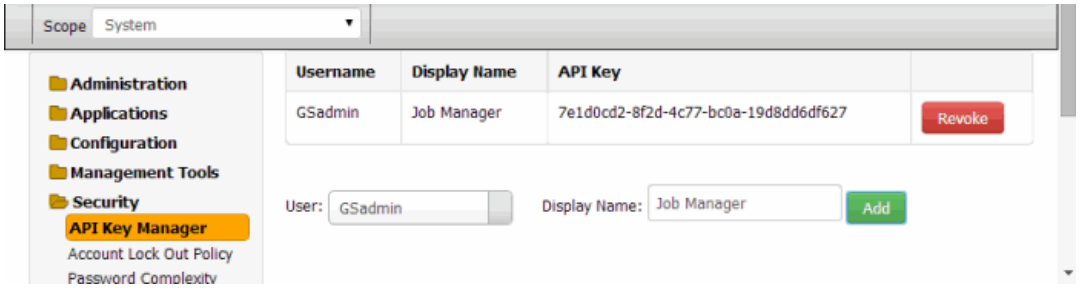
Feedback

Revoke an API Key

Use the **API Key Manager** panel to revoke an API key assigned to a user. Once revoked, the system denies requests to the Latitude Web Service using that API key.

To revoke an API key

1. In the **Navigation** pane, click **Security** > **API Key Manager**.



2. In the data grid, click **Revoke**. The system revokes the API key and removes it from the data grid.

Related Topics

API Key Manager

Security Settings

Feedback

Password Complexity Permission

Use the Password Complexity permission to specify the requirements for creating a user password for Latitude.

Location

In the **Navigation** pane, click **Security** > **Password Complexity**.

Scope

This permission is available for the following scopes:

- System
- Role
- User

- Branch

Policy

The policy allows your organization to specify requirements for creating passwords. Enable the permission for a scope and then specify the requirements.

Minimum characters: Minimum number of characters required when creating a password.

Minimum character classes: Minimum number of different types of characters required when creating a password. Character classes include:

- Uppercase letters (A-Z)
- Lowercase letters (a-z)
- Numbers (0-9)
- Special characters (for example, ~!@#$%)
- Control characters (for example, LF, TAB)

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Security Settings

Permissions and Policies

Feedback

Password Expiration Permission

Use the Password Expiration permission to specify the settings for the expiration of user passwords in Latitude.

Location

In the **Navigation** pane, click **Security** > **Password Expiration**.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

The policy allows your organization to specify settings for the expiration of passwords. Enable the permission for a scope and then specify the settings.

Maximum password age (days): Maximum number of days that users can use a password before it expires. If you set this value to zero, passwords never expire.

Minimum password age (days): Minimum number of days required to use a password before a user can change it. If you set this value to zero, users can change their password any time.

Enforce password history: Number of unique new passwords required before a user can reuse an old password.

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Security Settings

Permissions and Policies

Feedback

Access Services Permission

Use the Access Services permission to specify whether users can view the Services menu in Fusion.

Location

In the **Navigation** pane, click **Services** > **Access Services**.

Scope

This permission is available for the all scopes.

Policy

N/A

Related Topics

Search for a Permission or System Code

Set a Permission and Policy

Permissions and Policies

System Codes and Settings

Feedback

System Codes and Settings

Users with the System Codes and Settings Permission can customize codes and settings in the Latitude suite of products. For example, you can set up money buckets for storing money amounts related to an account. You can also set up letter types, claim types, status codes, payment methods, and various other codes.

For information about sorting and filtering data, see Data Grids.

Related Topics

Account Codes

Financial Codes

General Settings

Organization Groups

Party Codes

System Codes and Settings Permission

Search for a Permission or System Code

Data Grids

Account Codes

Feedback

Account Codes

You can set up and configure system account-related codes.

Related Topics

Anchor Cards

Anchors

Care Types

Claim Types

Classes of Business

Clients

Complaint Categories

Courts

Desks

Dispute Types

Documentation Categories

Extra Data Codes

Fee Schedules

Hardship Types

Legal Court Case Statuses

Letter Types

List Codes

Manual Process Stages

Note Action Codes

Note Result Codes

Process Stages

Queue Levels

Responsible Party Codes

Status Codes

System Configuration

System Codes and Settings

Anchor Cards

Anchor Cards

You can search for, add, and modify anchor cards to display in anchors. Anchors allow you to group anchor cards. For more information, see Delinquency or Recovery Anchor.

Related Topics

Add an Anchor Card

Modify an Anchor Card

Search for a Permission or System Code

Data Grids

Account Codes

Anchors

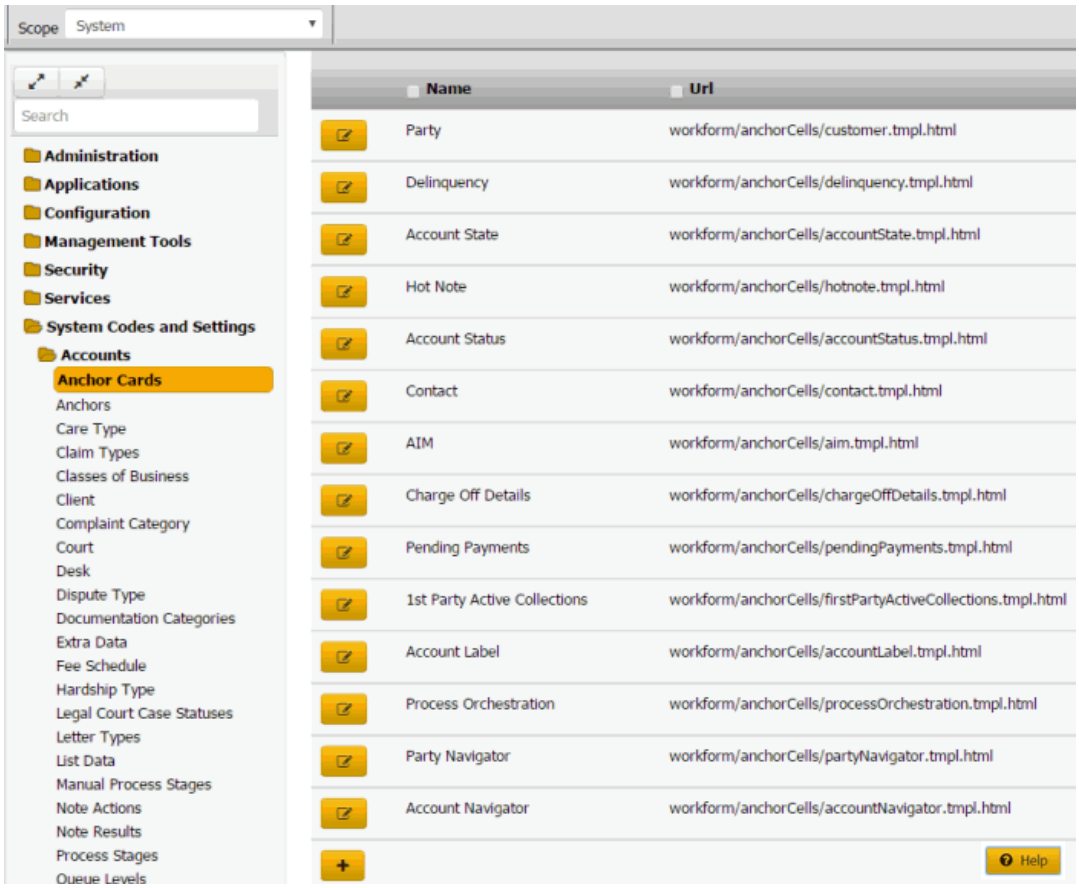
Delinquency or Recovery Anchor

Add an Anchor Card

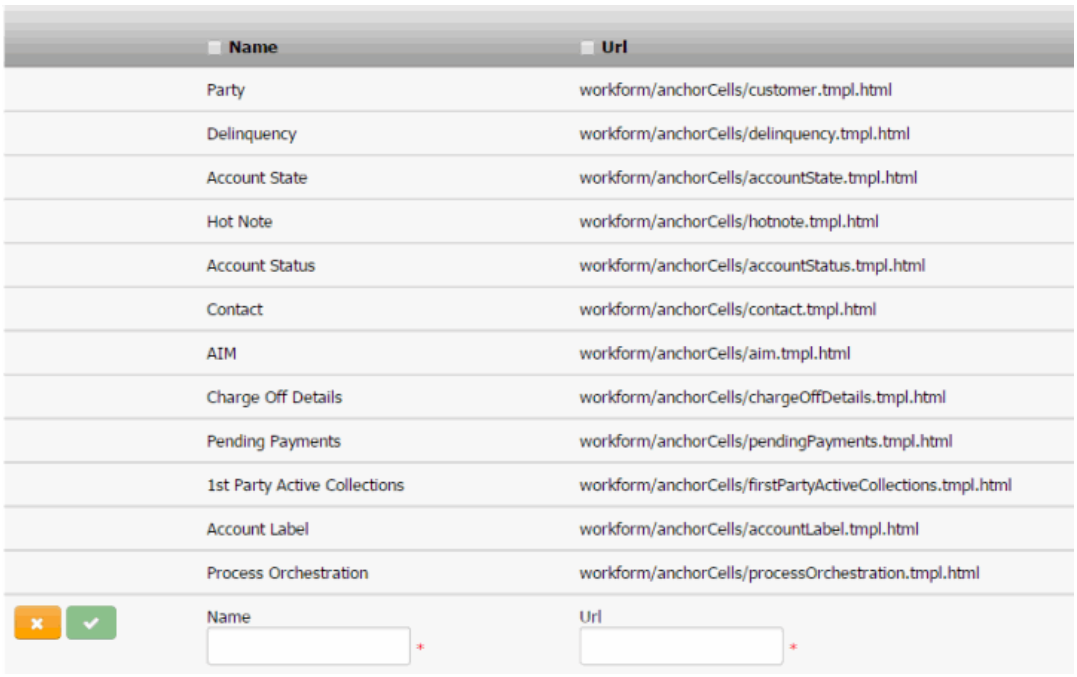
Use the **Anchor Cards** panel to add an anchor card.

To add an anchor card

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Anchor Cards**.



2. Click the plus sign (+). A blank row appears in the data grid.



3. In the **Name** box, type the name of the anchor card.

4. In the **URL** box, type the path to the anchor card application page. For example, "workform/anchorCells/customer.tmpl.html."
5. Click the check mark.

Related Topics

Search for a Permission or System Code

Data Grids

Anchor Cards

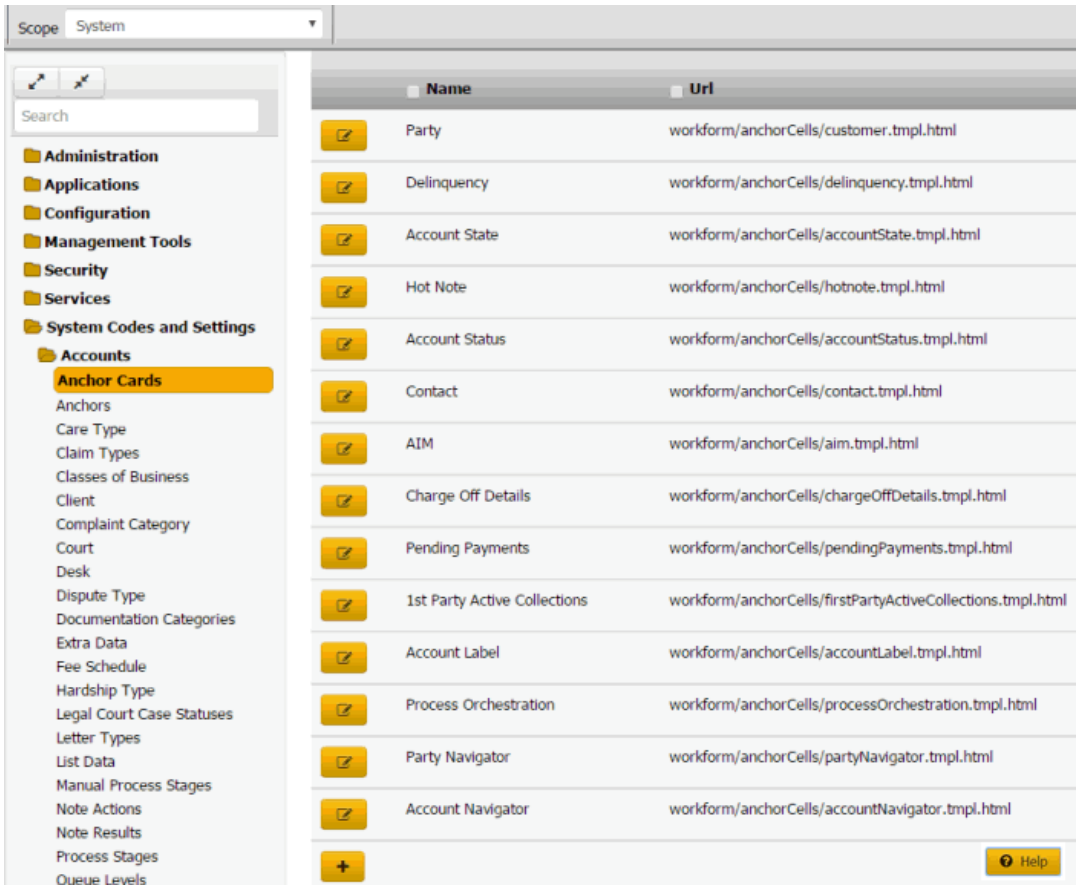
Feedback

Modify an Anchor Card

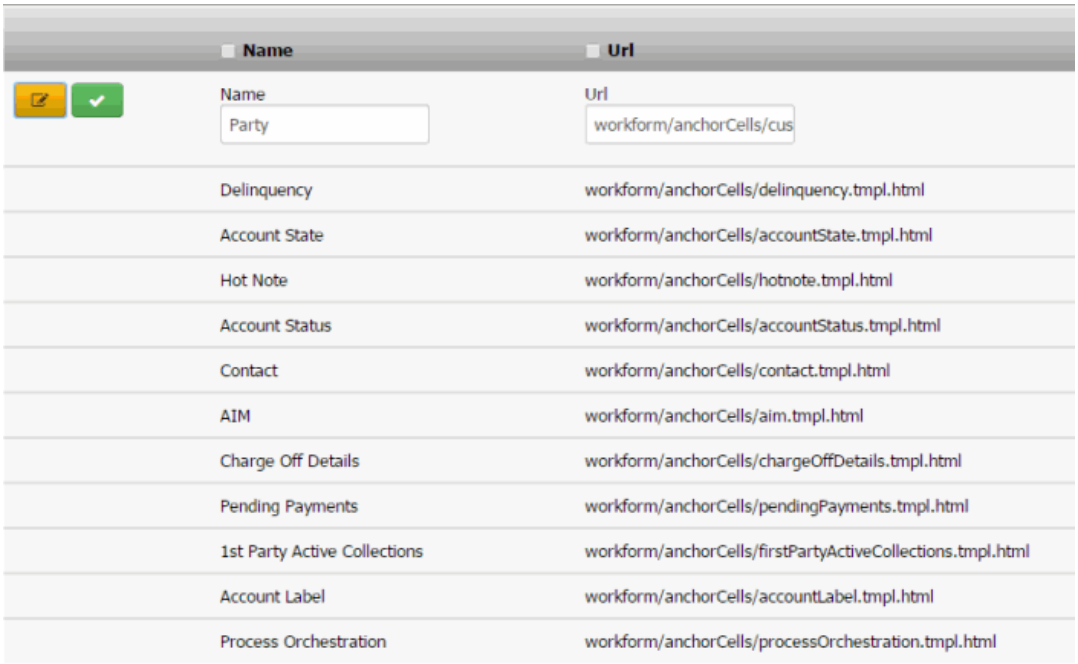
Use the **Anchor Cards** panel to modify an anchor card.

To modify an anchor card

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Anchor Cards**.



2. Click the Edit icon. The anchor card appears in edit mode.



Name	Url
Name: Party	Url: workform/anchorCells/cus
Delinquency	workform/anchorCells/delinquency.tmpl.html
Account State	workform/anchorCells/accountState.tmpl.html
Hot Note	workform/anchorCells/hotnote.tmpl.html
Account Status	workform/anchorCells/accountStatus.tmpl.html
Contact	workform/anchorCells/contact.tmpl.html
AIM	workform/anchorCells/aim.tmpl.html
Charge Off Details	workform/anchorCells/chargeOffDetails.tmpl.html
Pending Payments	workform/anchorCells/pendingPayments.tmpl.html
1st Party Active Collections	workform/anchorCells/firstPartyActiveCollections.tmpl.html
Account Label	workform/anchorCells/accountLabel.tmpl.html
Process Orchestration	workform/anchorCells/processOrchestration.tmpl.html

3. Modify the information and then click the check mark.

Related Topics

Search for a Permission or System Code

Data Grids

Anchor Cards

Anchors

Feedback

Anchors

You can add anchors, delete anchors, add anchor cards to an anchor, and remove anchor cards from an anchor. Anchors allow you to group anchor cards for display. For more information, see Delinquency or Recovery Anchor.

Related Topics

Add an Anchor

Delete an Anchor

Add an Anchor Card to an Anchor

Delete an Anchor Card From an Anchor

Account Codes

Anchor Cards

Delinquency or Recovery Anchor

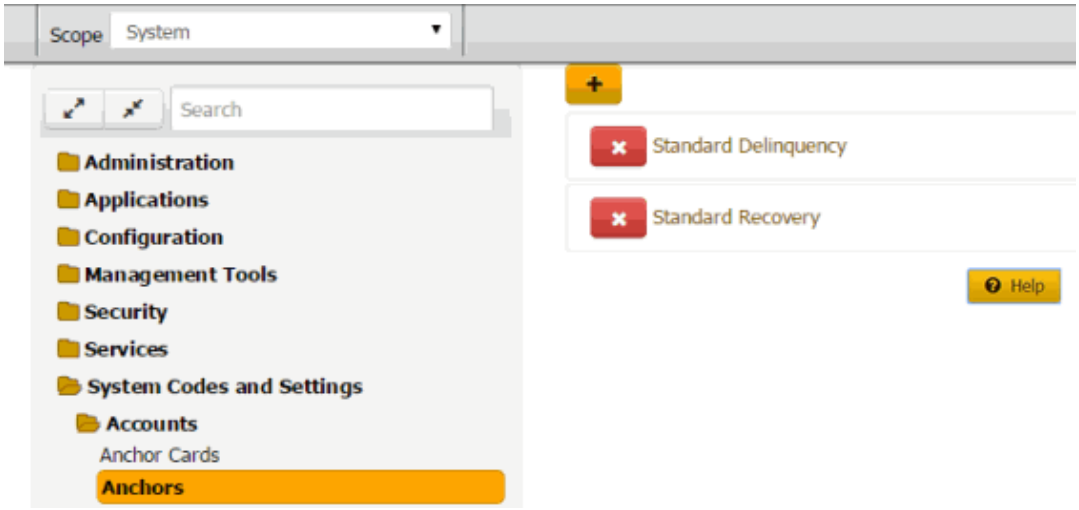
Feedback

Add an Anchor

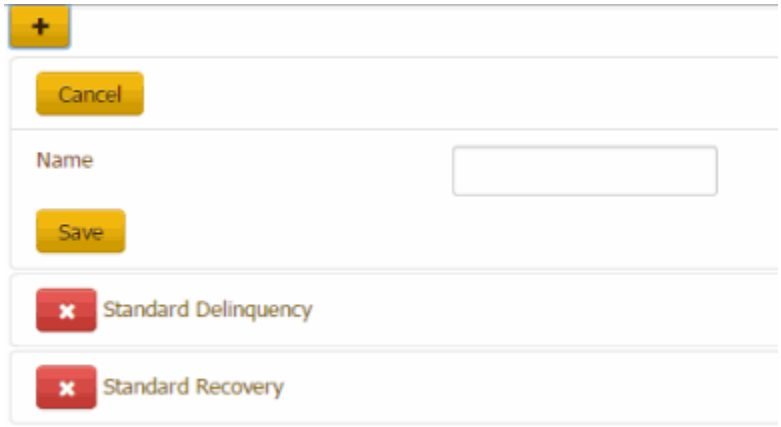
Use the **Anchors** panel to add an anchor.

To add an anchor

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Anchors**.



2. Click the plus sign (+). The panel appears in add mode.



3. In the **Name** box, type the name of the anchor and then click **Save**.

Related Topics

Search for a Permission or System Code

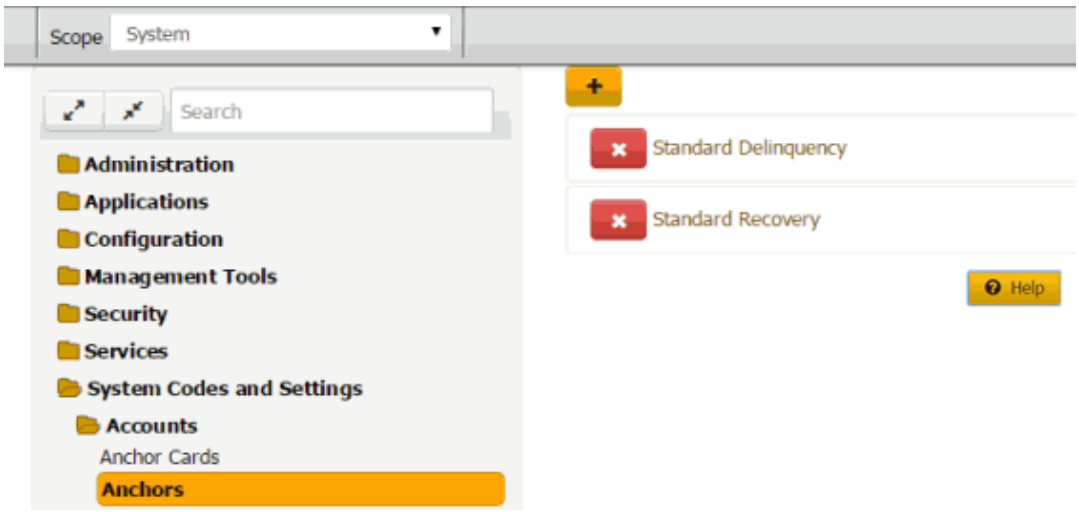
Anchors

Delete an Anchor

Use the **Anchors** panel to delete an anchor.

To delete an anchor

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Anchors**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Search for a Permission or System Code

Anchors

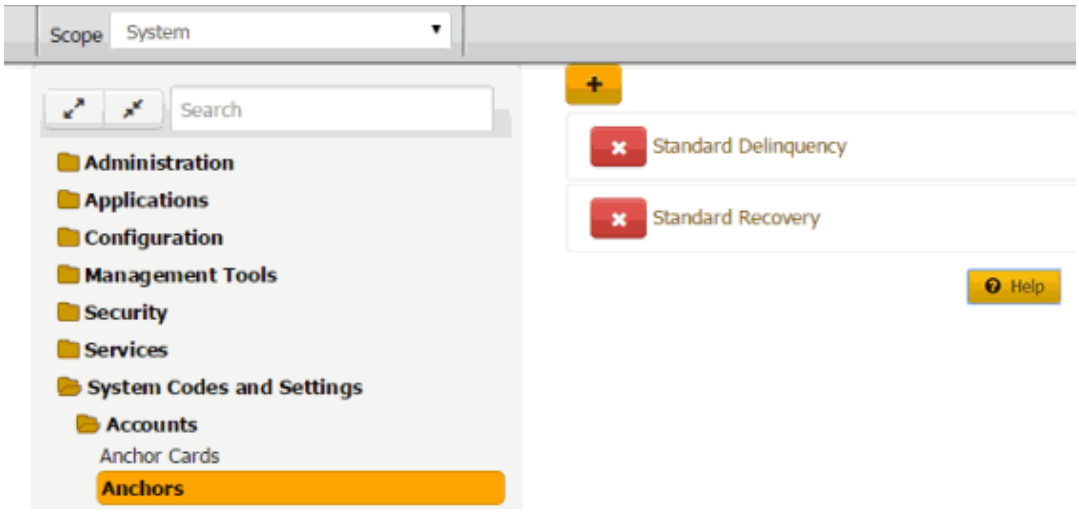
Feedback

Add an Anchor Card to an Anchor

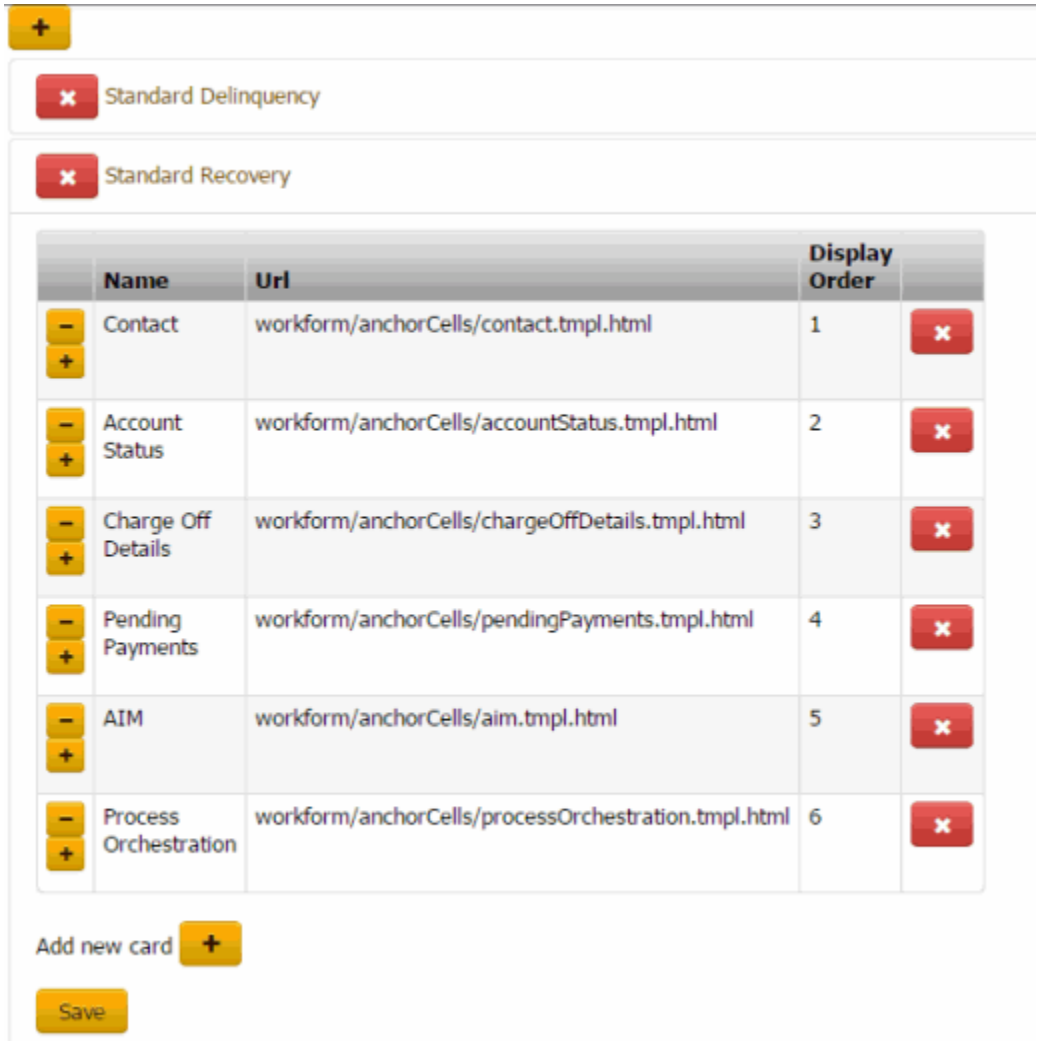
Use the **Add Anchor Cell** dialog box to add an anchor card to an anchor.

To add an anchor card to an anchor

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Anchors**.



2. Click the anchor to which to add an anchor card. The anchor expands.



3. Under the data grid, click the plus sign (+). The **Add Anchor Cell** dialog box appears.

4. In the list box, click the anchor card to add to the anchor and then click **Save**. The system adds the anchor card to the data grid.

5. To change the card's display order, click the minus sign (-) to move up the card in the list. Click the plus sign (+) to move down the card in the list.

6. Click **Save**.

Related Topics

Search for a Permission or System Code

Anchors

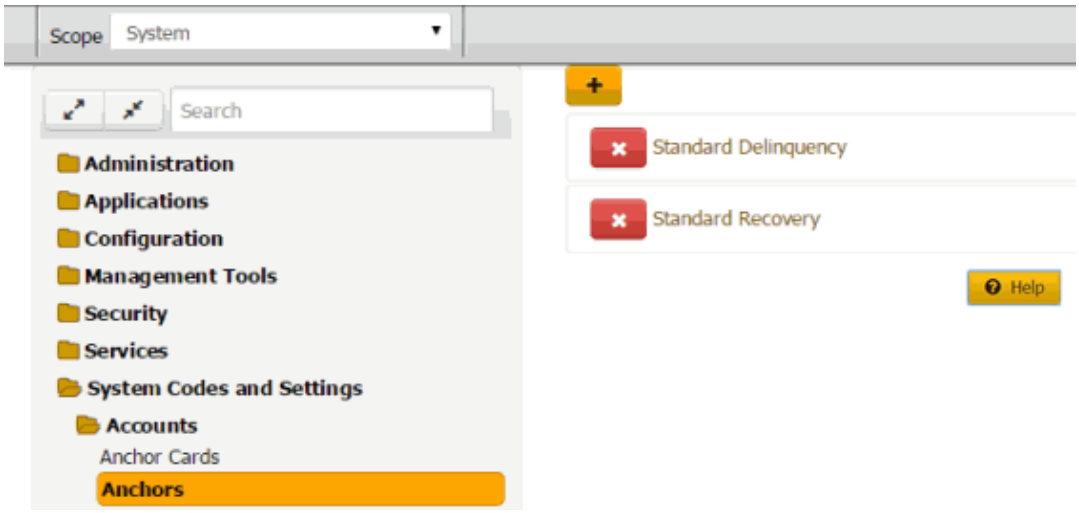
Feedback

Delete an Anchor Card From an Anchor

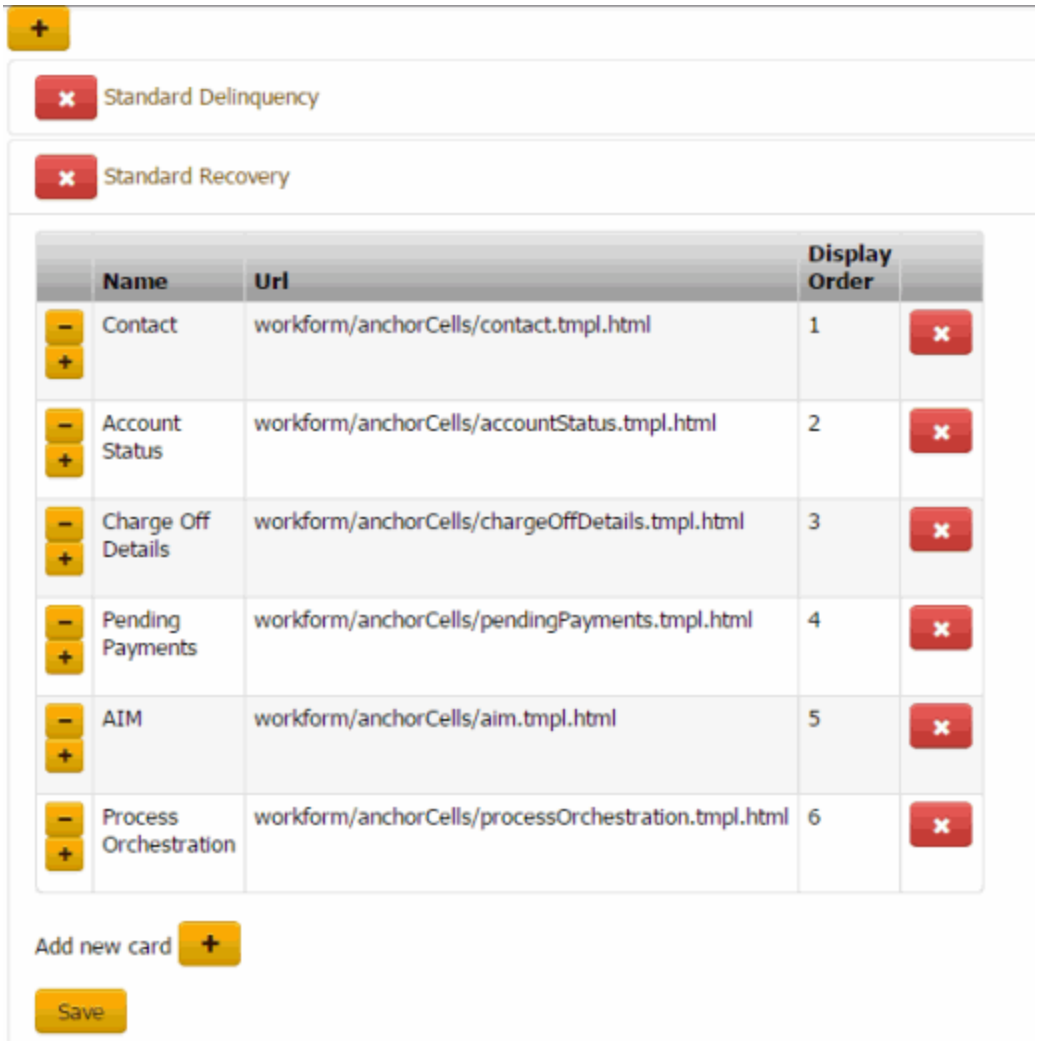
Use the **Anchor Card** panel to delete an anchor card from an anchor.

To delete an anchor card from an anchor

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Anchors**.



2. Click the anchor to modify. The anchor expands.



3. In the data grid, click the Delete icon and then click **OK**.

Related Topics

Search for a Permission or System Code

Anchors

API Defaults

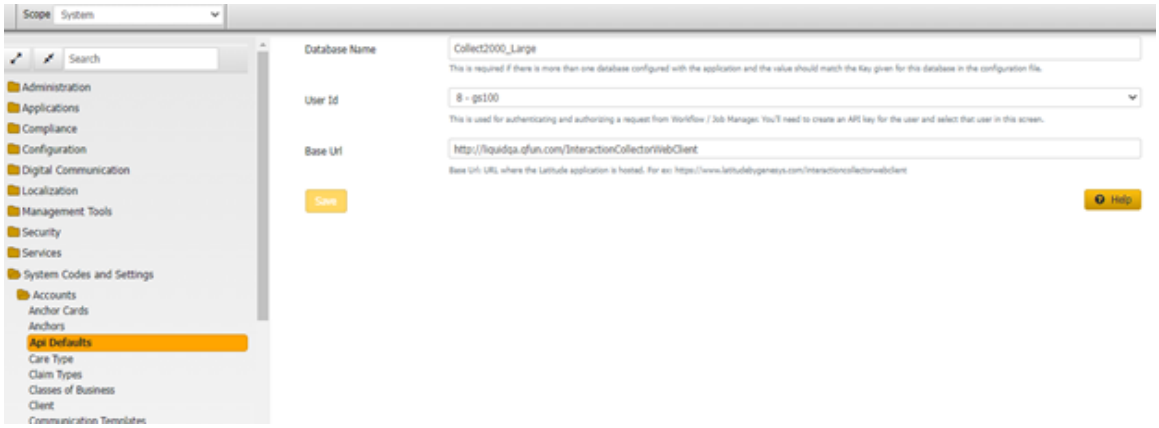
Feedback

API Defaults

This tab is used to show the record in [dbo].[apidefaults] It will show ONLY ONE RECORD. If there is no record, then there will be an option to add a record

To Select API Defaults

- In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **API Defaults**.



- **Database Name:** This is required if there is more than one database configured with the application and the value should match the Key given for this database in the configuration file.
- **User Id:** This is used for authenticating and authorizing a request from Workflow / Job Manager. You'll need to create an API key for the user and select that user on this screen.
- **Base Url:** URL where the Latitude application is hosted. For ex: https://www.latitudebygenesys.com/interactioncollectorwebclient

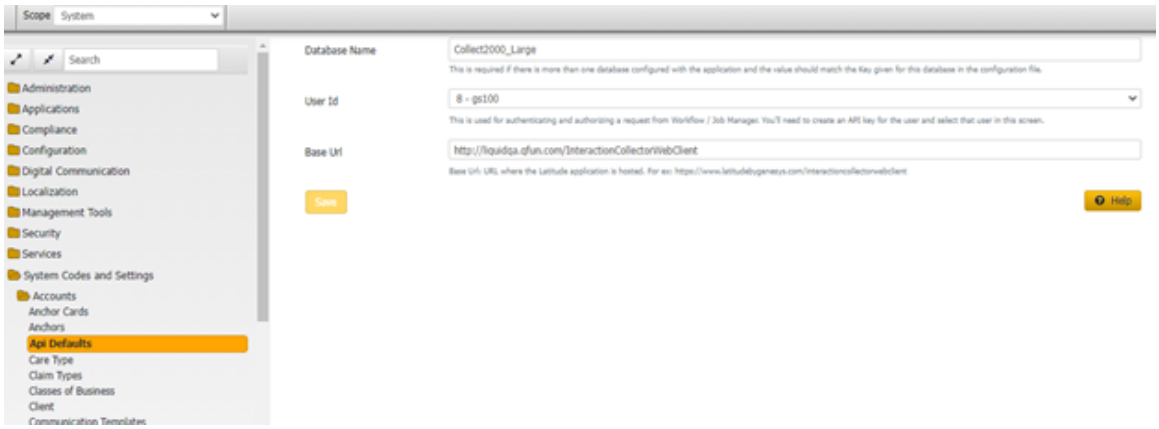
Feedback

API Defaults

This tab is used to show the record in [dbo].[apidefaults] It will show ONLY ONE RECORD. If there is no record, then there will be an option to add a record

To Select API Defaults

- In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **API Defaults**.



- **Database Name:** This is required if there is more than one database configured with the application and the value should match the Key given for this database in the configuration file.

- **User Id:** This is used for authenticating and authorizing a request from Workflow / Job Manager. You'll need to create an API key for the user and select that user on this screen.
- **Base Url:** URL where the Latitude application is hosted. For ex: https://www.latitudebygenesys.com/interactioncollectorwebclient

Care Types

Feedback

Care Types

You can add, modify, and delete customer care types, such as armed forces, prison, and family bereavement. Users specify a care type when creating care cases. For more information, see Add a Care or Financial Hardship Case.

Related Topics

Add a Care Type
Modify a Care Type

Delete a Care Type

Add a Care or Financial Hardship Case

Modify a Care or Financial Hardship Case

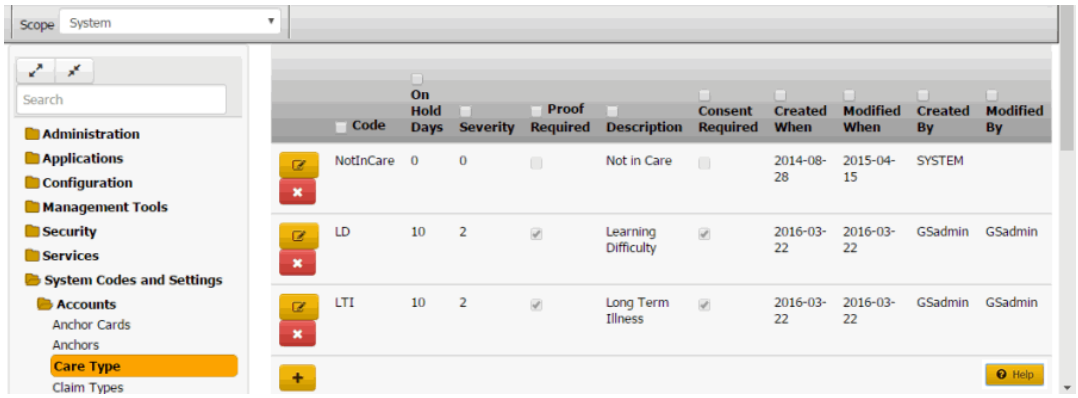
Feedback

Add a Care Type

Use the **Care Type** panel to add a care type.

To add a care type

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Care Type**.



Code: Code that identifies the type of care, such as long-term illness or literacy issues.

On Hold Days: Default number of days to place the account on hold to suspend collection activity.

Severity: Level of severity (1-10) for the care type.

Proof Required: If selected, your organization requires proof of the need for care.

Description: Description of the care type.

Consent: If selected, you have consent from the customer to discuss care and financial hardship information.

2. Click the plus sign (+). A blank row appears in the data grid.
3. Complete the information and then click the check mark.

Related Topics
Care Types

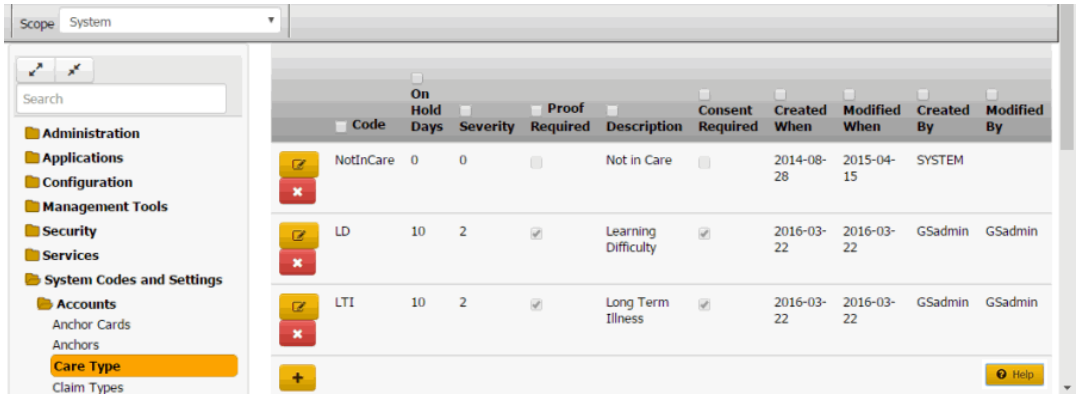
Account Codes

Feedback

Modify a Care Type
Use the **Care Type** panel to modify a care type.

To modify a care type

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Care Type**.



Code: Code that identifies the type of care, such as long-term illness or literacy issues.

On Hold Days: Default number of days to place the account on hold to suspend collection activity.

Severity: Level of severity (1-10) for the care type.

Proof Required: If selected, your organization requires proof of the need for care.

Description: Description of the care type.

Consent: If selected, you have consent from the customer to discuss care and financial hardship information.

2. Click the Edit icon. The care type appears in edit mode.
3. Modify the information and then click the check mark.

Related Topics

Care Types

Account Codes

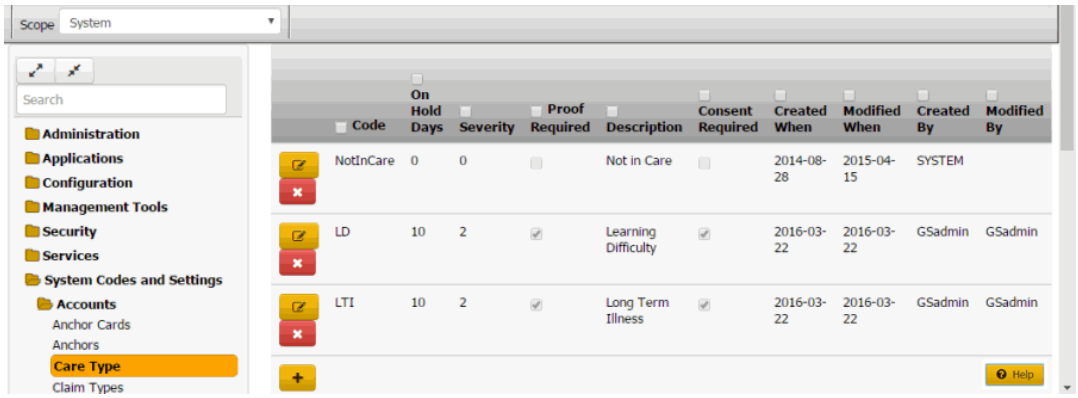
Feedback

Delete a Care Type

Use the **Care Type** panel to delete a care type.

To delete a care type

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Care Type**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Care Types

Account Codes

Claim Types

Feedback

Claim Types

You can search for, add, modify, and delete claim types. You can assign claim types to accounts that your organization handles. The system uses claim types to determine the statute of limitations.

Related Topics

Add a Claim Type

Modify a Claim Type

Delete a Claim Type

Search for a Permission or System Code

Data Grids

Account Codes

View Additional Account Information

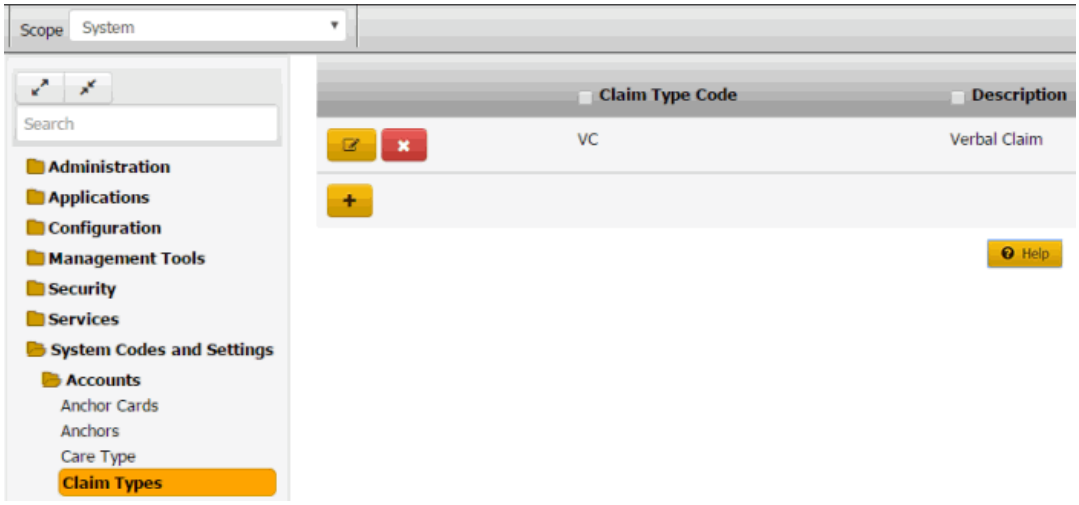
Feedback

Add a Claim Type

Use the **Claim Types** panel to add a claim type.

To add a claim type

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Claim Types**.



2. Click the plus sign (+). A blank row appears in the data grid.

3. In the **Claim Type Code** box, type a unique code for the claim type.
4. In the **Description** box, type a description of the claim type.
5. Click the check mark.

Related Topics

Search for a Permission or System Code

Data Grids

Claim Types

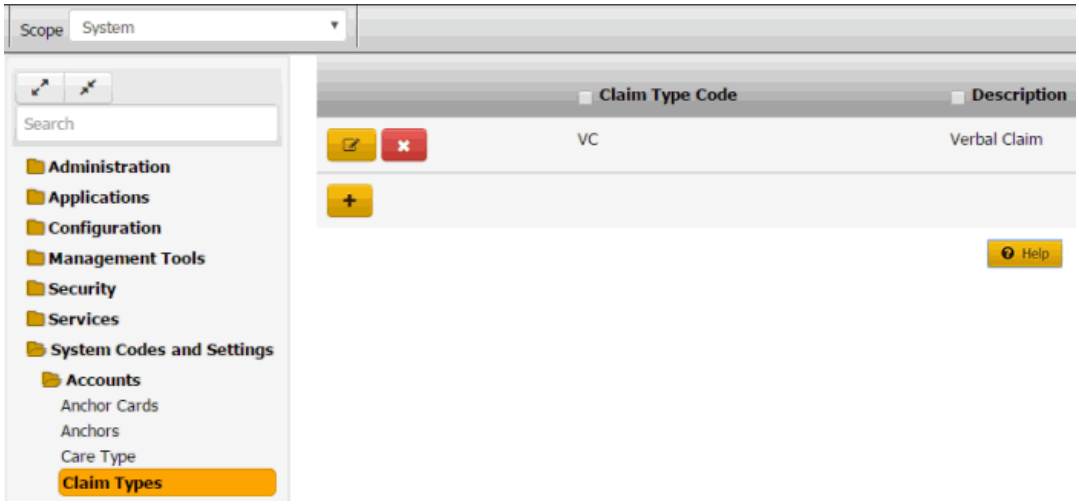
Feedback

Modify a Claim Type

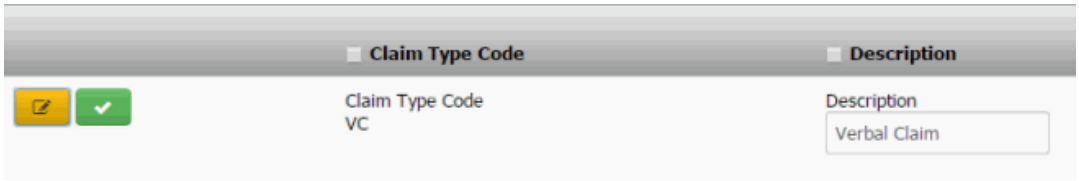
Use the **Claim Types** panel to modify a claim type.

To modify a claim type

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Claim Types**.



2. Click the Edit icon. The claim type appears in edit mode.



3. Modify the information and then click the check mark.

Related Topics

Search for a Permission or System Code

Data Grids

Claim Types

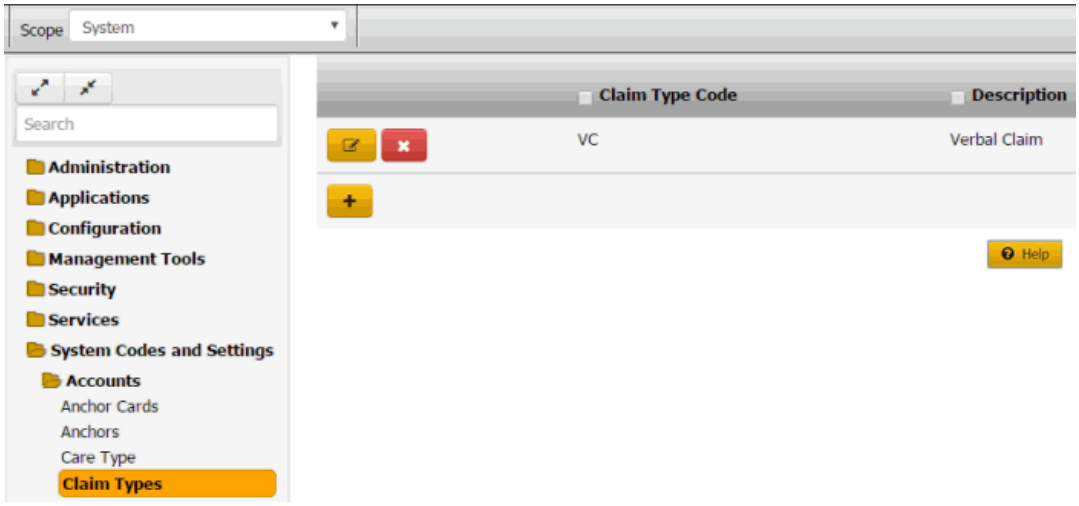
Feedback

Delete a Claim Type

Use the **Claim Types** panel to delete a claim type.

To delete a claim type

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Claim Types**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Search for a Permission or System Code

Data Grids

Claim Types

Classes of Business

Feedback

Classes of Business

You can search for, add, modify, and delete classes of business. You assign classes of business to clients to group them according to the type of company each of your clients represents. For more information, see Maintain Client Account Information. For imported accounts, Latitude assigns the class of business.

Related Topics

Add a Class of Business

Modify a Class of Business

Delete a Class of Business

Search for a Permission or System Code

Data Grids

Account Codes

Maintain Client Account Information

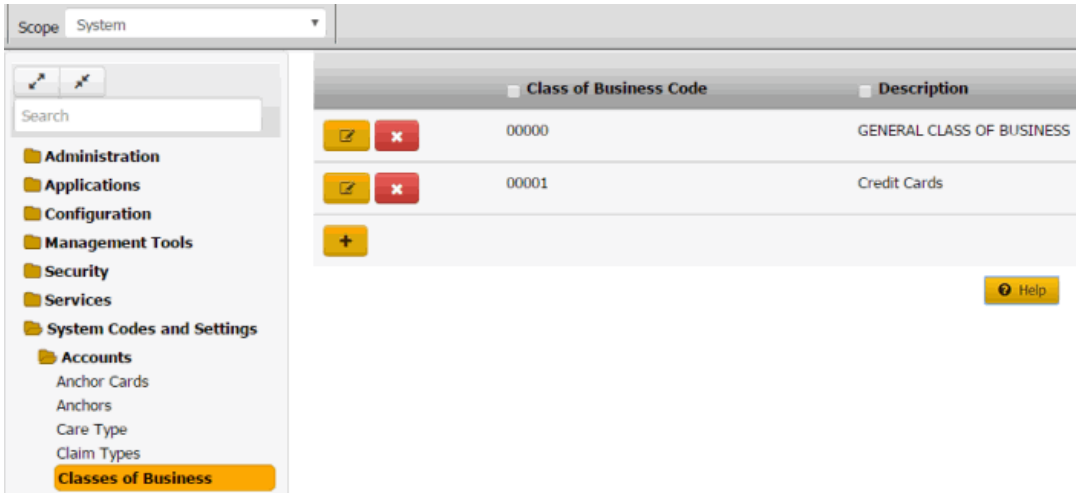
Feedback

Add a Class of Business

Use the **Classes of Business** panel to add a class of business.

To add a class of business

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Classes of Business**.



2. Click the plus sign (+). A blank row appears in the data grid.

3. In the **Class of Business Code** box, type a unique code for the class of business.
4. In the **Description** box, type a description of the class of business.
5. Click the check mark.

Related Topics

Search for a Permission or System Code

Data Grids

Classes of Business

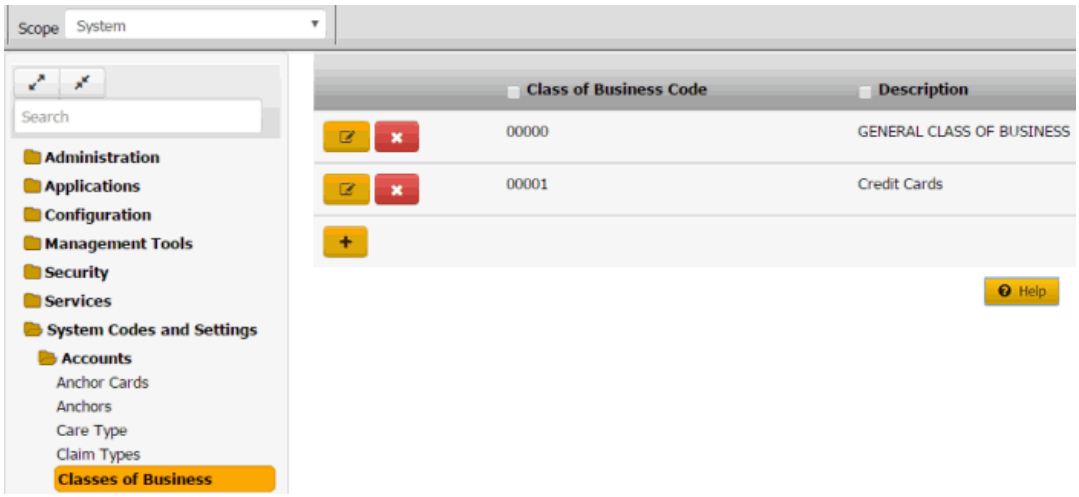
Feedback

Modify a Class of Business

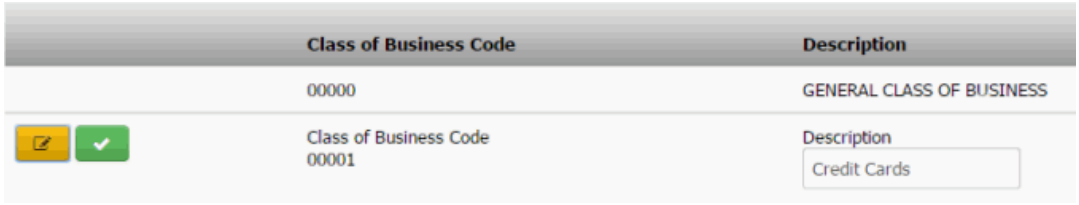
Use the **Classes of Business** panel to modify a class of business.

To modify a class of business

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Classes of Business**.



2. Click the Edit icon. The class of business appears in edit mode.



3. Modify the description and then click the check mark.

Related Topics

[Search for a Permission or System Code]

[Data Grids]

[Classes of Business]

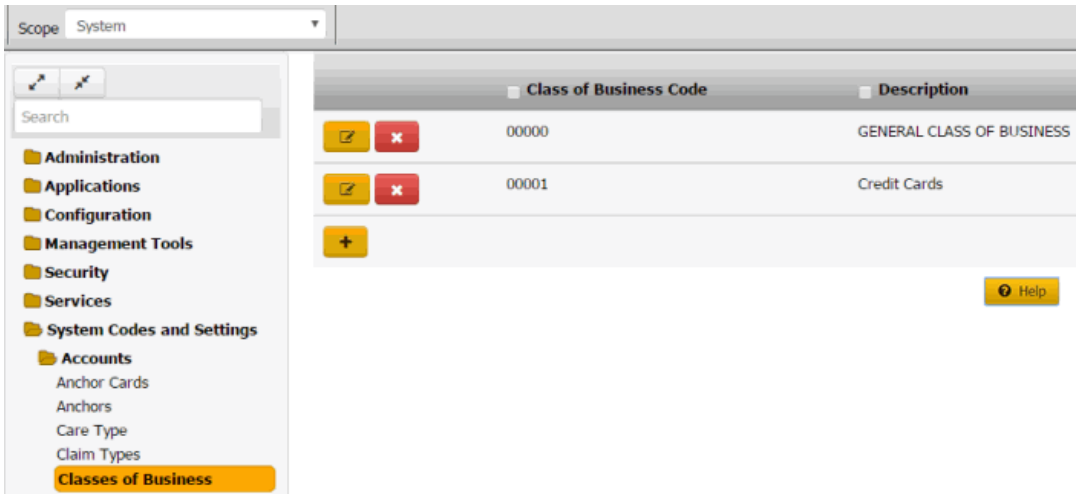
Feedback

Delete a Class of Business

Use the **Classes of Business** panel to delete a class of business.

To delete a class of business

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Classes of Business**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Search for a Permission or System Code

Data Grids

Classes of Business

Clients

Feedback

Clients

You can add and modify clients, but you cannot delete them.

Note: To add a client to a client group, use Latitude Console. For more information, see *Customer Groups* in the Latitude Console documentation. Clients are still referred to as "customers" in Latitude Console.

Related Topics

Add a Client

Maintain General Client Information

Maintain Client Account Information

Maintain Client Fees

Maintain Client Invoice Settings

Maintain Client Guidelines

Custom Data

Client Interest

Account Codes

Classes of Business

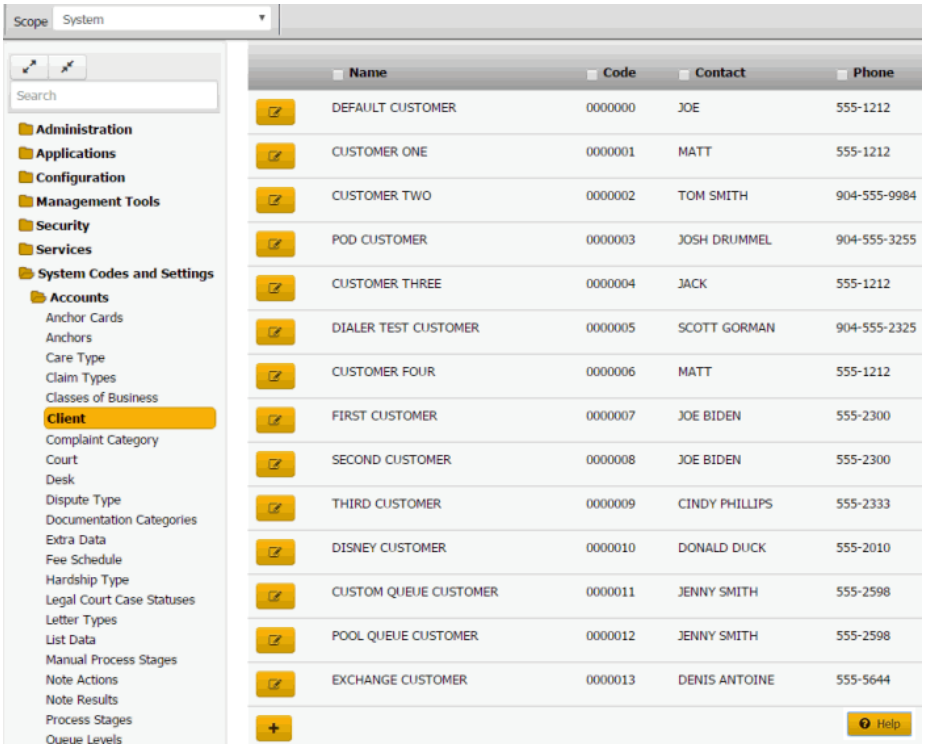
Feedback

Add a Client

Use the **General** tab in the **Client** dialog box to maintain general information for a client.

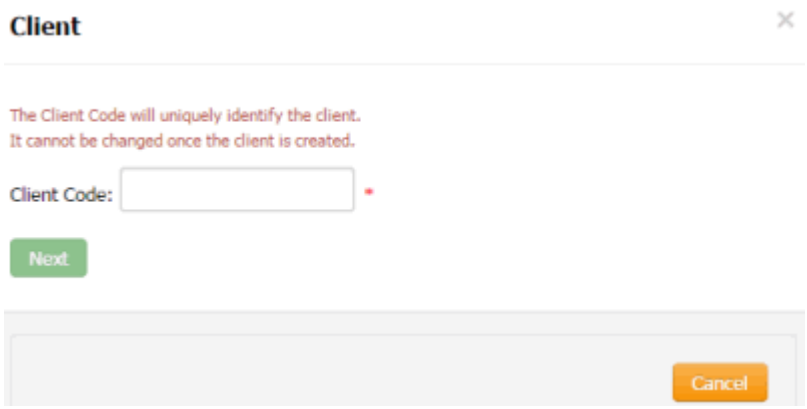
To maintain general client information

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Client**.

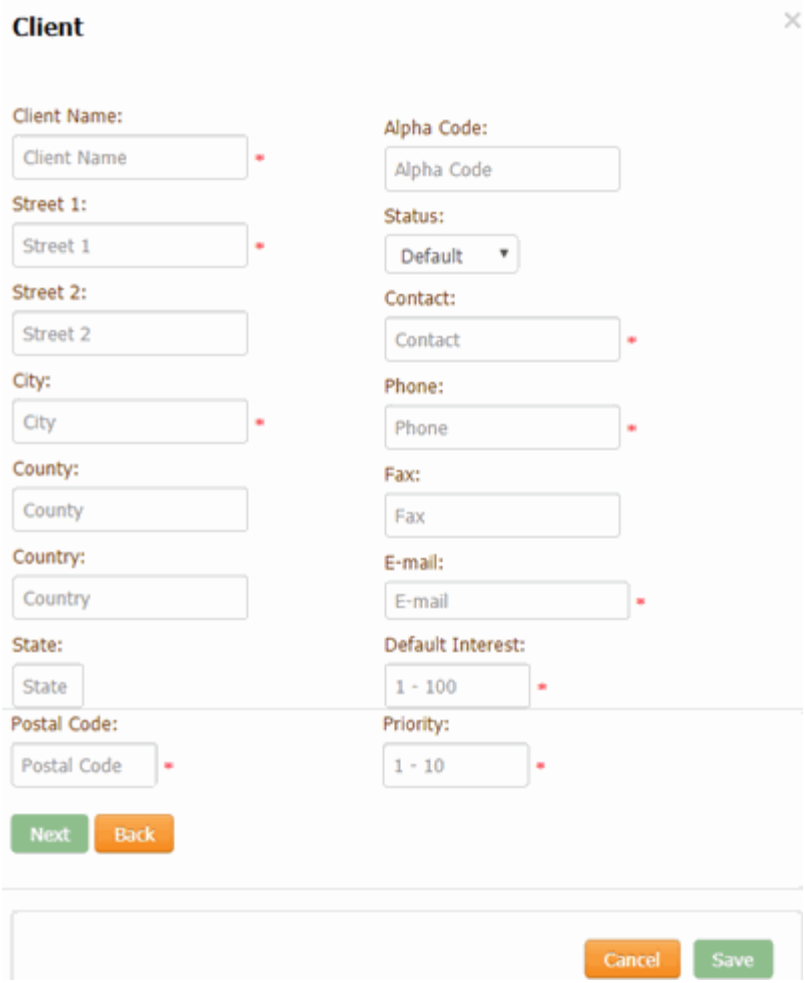


Tip: To limit the clients that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

2. Click the plus sign (+).



3. In the **Client Code** box, type a unique code to identify the client and then click **Next**.



Client Name: Full name of the client.

Street 1: First line of the client's street address.

Street 2: Second line of the client's street address.

City: Client's city.

County: Client's county.

Country: Client's country.

State: Client's state.

Postal Code: Client's postal code.

Alpha Code: Generic code used for conversions from other systems. Allows your organization to reference any code associated to the client previously.

Status: Status of the account.

Contact: Full name of the contact person.

Phone: Contact person's phone number.

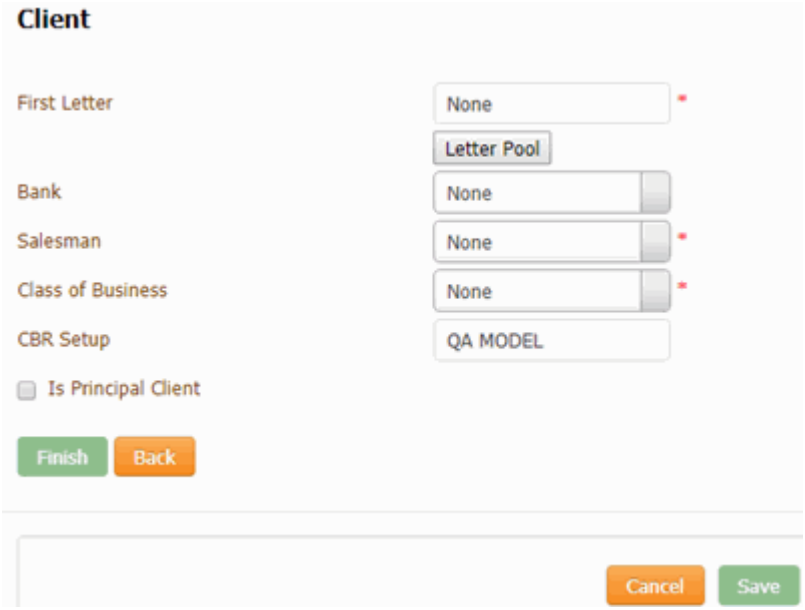
Fax: Contact person's fax number.

Email: Contact person's email address.

Default Interest: Interest rate to assign to new accounts imported for this client. You can override the rate using Exchange or manually. For more information, see Maintain General Client Information.

Priority: Sets the priority when spreading payments across linked accounts. Generally, the values are 1-10 (with 10 being the highest priority). You can assign the same priority to clients. Maximum settings allow up to 255 priorities.

4. Complete the information and then click **Next**.



First Letter: First letter to generate for new accounts. For information about managing letters, see the *Letter Console* documentation.

Bank: If your organization prints checks for the client, this value is the trust account your organization uses for this client. For information about setting up trust accounts and printing checks, see the *Invoices* documentation.

Salesman: Salesman handling this client account. For more information, see Salesman.

Class of Business: Class of business to assign to this client account. For more information, see Classes of Business.

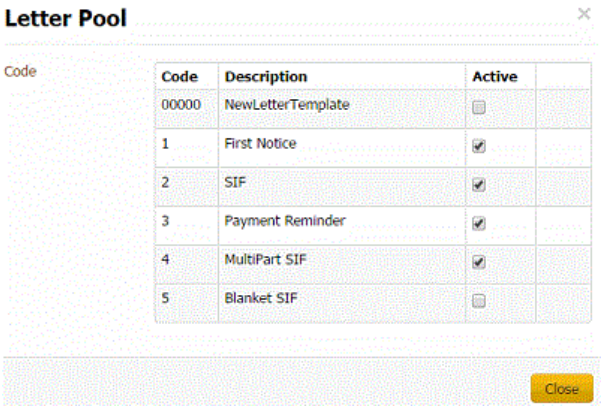
CBR Setup: Credit Bureau Reporting method.

Is Principle Client: If selected, your organization owns the accounts that this client holds. If cleared, your organization holds this client's accounts for collection purposes only.

5. To specify one or more letters to populate the **First Letter** list box, do the following:

a. Click **Letter Pool**.

Note: Only the letters with a time restriction set in Letter Console to either "Allow Always" or "Only Allow in First 30 Days" appear in this dialog box.



b. Select the check box for each letter you want to display in the **First Letter** list box.

b. Clear the check box for each letter you don't want to display in the **First Letter** list box.

b. Click **Close**.

6. In the **First Letter** list box, click the first letter to send to customers.

7. Complete the remaining information and then click **Finish**.

Related Topics

Search for a Permission or System Code

Data Grids

Clients

Maintain General Client Information

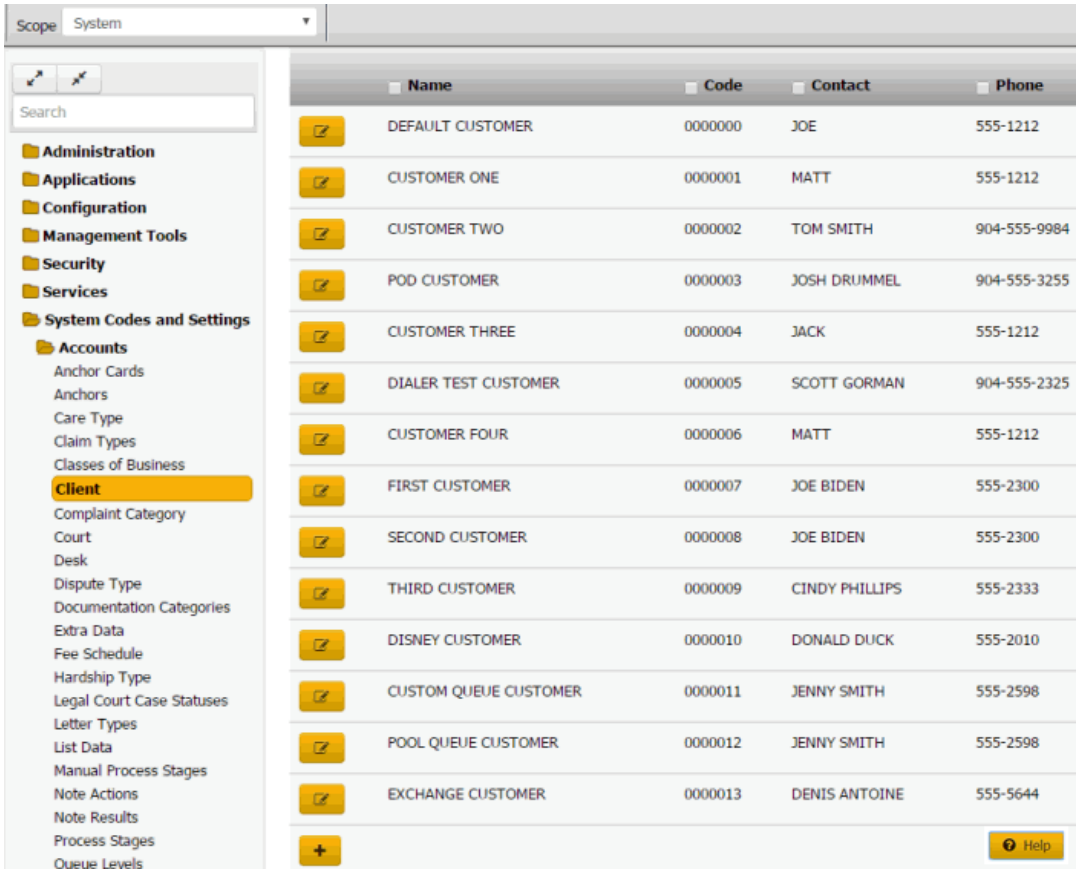
Feedback

Maintain General Client Information

Use the **General** tab in the **Client** dialog box to maintain general information for a client.

To maintain general client information

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Client**.



Tip: To limit the clients that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

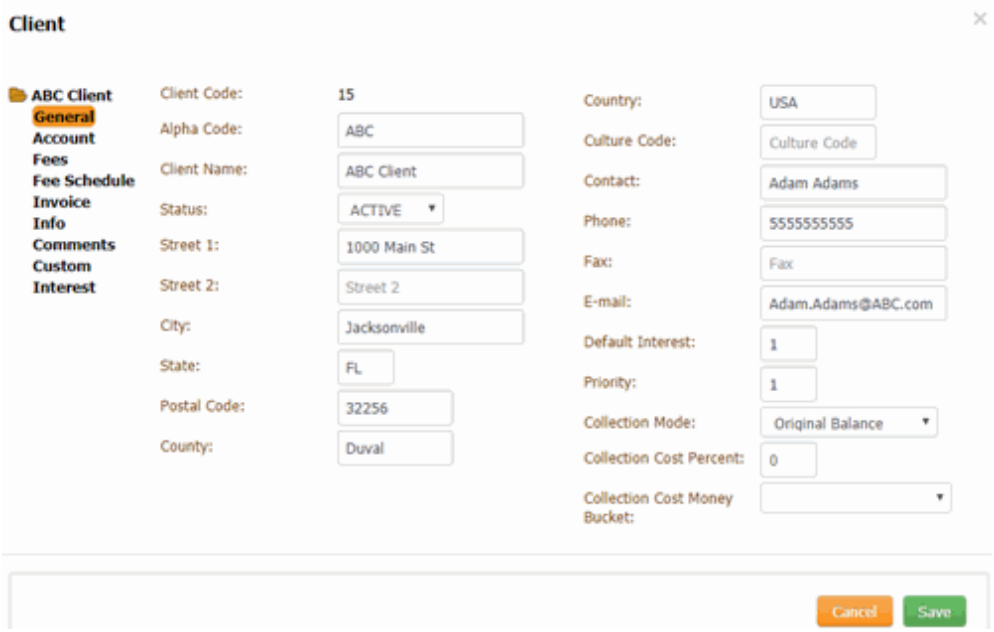
2. To search for a client, do the following:

    a. Click one or more check boxes next to a column heading.

    b. In the **Filter** box for each check box selected, type the criteria for which to search.

    c. Click the Refresh icon. The system displays clients that match the specified criteria only.

3. In the data grid, click the Edit icon and then click **General**.



Client Code: Unique code that your organization assigned to identify the client.

Alpha Code: Generic code used for conversions from other systems. Allows your organization to reference any code associated to the client previously.

Client Name: Full name of the client.

Status: Status of the account.

Street 1: First line of the client's street address.

Street 2: Second line of the client's street address.

City: Client's city.

State: Client's state.

Postal Code: Client's postal code.

County: Client's county.

Country: Client's country.

Culture Code: Code that indicates the region where the client is located. For example, "en-US" indicates the client is in an English-speaking country, and the country is the United States of America. Latitude uses this information for things such as determining which currency symbol to use.

Contact: Full name of the contact person.

Phone: Contact person's phone number.

Fax: Contact person's fax number.

E-mail: Contact person's email address.

Default Interest: Interest rate to assign to new accounts imported for this client. You can override the rate using Exchange or manually.

Priority: Sets the priority when spreading payments across linked accounts. Generally, the values are 1-10 (with 10 being the highest priority). You can assign the same priority to clients. Maximum settings allow up to 255 priorities.

Collection Mode: Method to use to calculate the portion of a payment to apply toward collection costs. Latitude allocates a portion of the payment toward the Collection Cost money bucket before applying the remaining payment amount to the other money buckets.

Original Balance: Calculates the collection cost on the original account balance. The formula is: Original account balance x Collection Cost Percent.

Current Gross: Calculates the collection cost on the current gross account balance. The formula is: ((1/(1-(Collection Cost Percent)))-1) x (Principal + Interest + Other fees).

Collection Cost Percent: Percent to use to calculate collection costs.

Collection Cost Money Bucket: Money bucket for storing collection costs. Latitude calculates the collection cost and adds it to this bucket when users add accounts manually for this client.

4. Complete the information and then click **Save**.

Related Topics

Search for a Permission or System Code

Data Grids

Clients

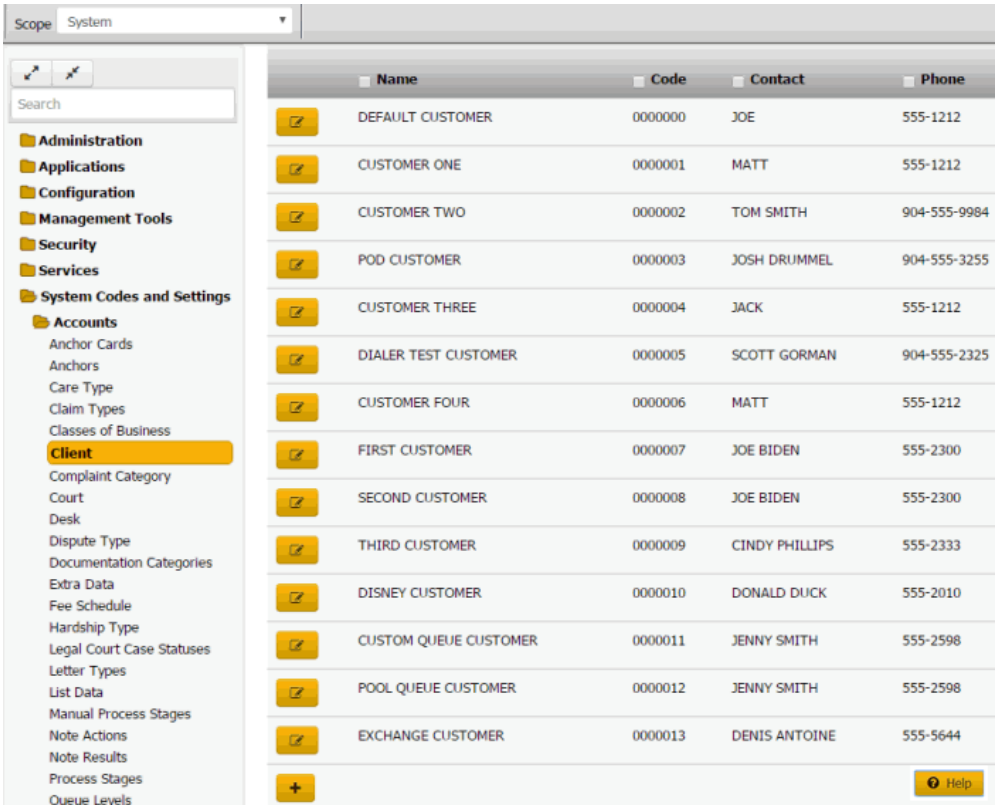
Feedback

Maintain Client Account Information

Use the **Account** tab in the **Client** dialog box to maintain account information for a client.

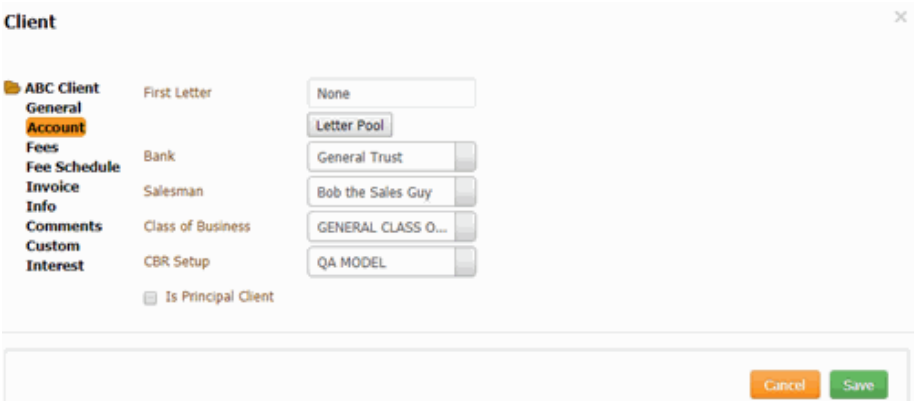
To maintain client account information

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Client**.



Tip: To limit the clients that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

2. In the data grid, click the Edit icon and then click **Account**.



First Letter: First letter to generate for new accounts. For information about managing letters, see the *Letter Console* documentation.

Bank: If your organization prints checks for the client, this value is the trust account your organization uses for this client. For information about setting up trust accounts and printing checks, see the *Invoices* documentation.

Salesman: Salesman handling this client account. For more information, see Salesman.

Class of Business: Class of business to assign to this client account. For more information, see Classes of Business.

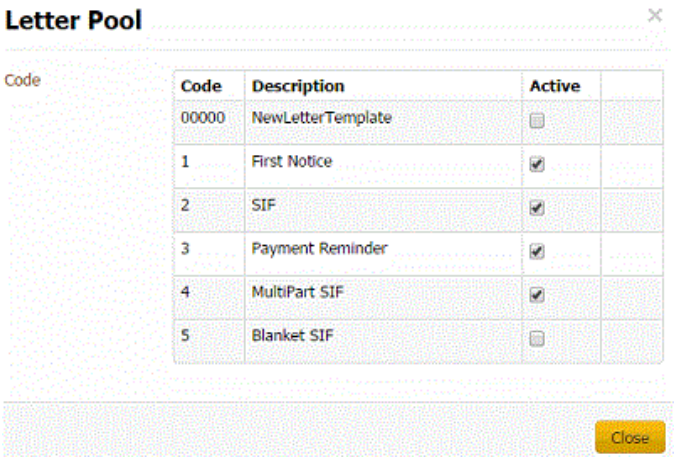
CBR Setup: Credit Bureau Reporting method.

Is Principle Client: If selected, your organization owns the accounts that this client holds. If cleared, your organization holds this client's accounts for collection purposes only.

3. To specify one or more letters to populate the **First Letter** list box, do the following:

    a. Click **Letter Pool**.

Note: Only the letters with a time restriction set in Letter Console to either "Allow Always" or "Only Allow in First 30 Days" appear in this dialog box.



    b. Select the check box for each letter you want to display in the **First Letter** list box.

    b. Clear the check box for each letter you don't want to display in the **First Letter** list box.

    b. Click **Close**.

4. In the **First Letter** list box, click the first letter to send to customers.

5. Complete the remaining information and then click **Save**.

Related Topics

Search for a Permission or System Code

Data Grids

Classes of Business

Salesman

Clients

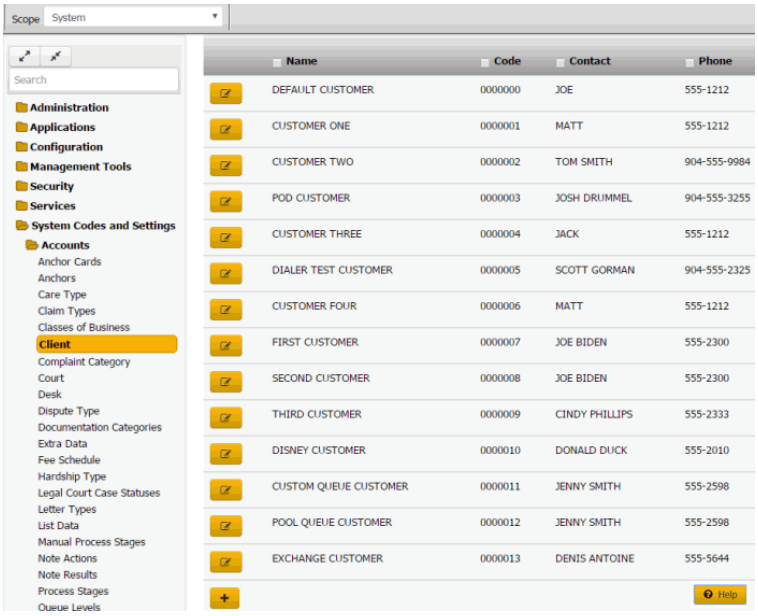
Feedback

Maintain Client Fees

Use the **Fees** tab in the **Client** dialog box to maintain fees for a client.

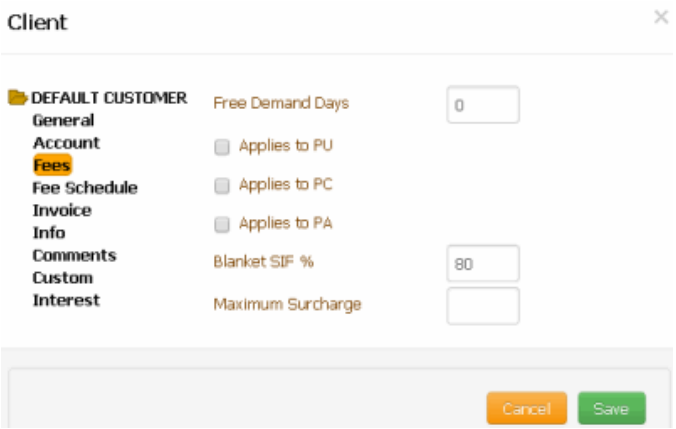
To maintain client fees

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Client**.



Tip: To limit the clients that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

2. In the data grid, click the Edit icon and then click **Fees**.



Free Demand Days: Number of "grace" days to grant to a client when receiving new business.

Applies to PU: If selected, Latitude doesn't apply fees to the "Paid Us" payment type for the number days indicated in the **Free Demand Days** box.

Applies to PC: If selected, Latitude doesn't apply fees to the "Paid Client" payment type for the number days indicated in the **Free Demand Days** box.

Applies to PA: If selected, Latitude doesn't apply fees to the "Paid Agency" payment type for the number days indicated in the **Free Demand Days** box.

Blanket SIF %: Percentage of the account balance that the client requires as a minimum to consider an account settled in full.

Maximum Surcharge: Maximum surcharge amount on payments received. For more information, see Surcharge Rules.

Use Fee Schedule: Default fee schedule to use for this client's accounts.

Legal Fee Schedule: Fee schedule to use for accounts that have an attorney or forwarder.

Collector Fee Schedule: Fee schedule to display to users who do not have permissions to view fees.

Fee Cap %: If selected, indicates that you want to stop applying fees to buckets after reaching the specified fee cap percentage.

Fee Cap $: If selected, indicates that you want to stop applying fees to buckets after reaching the specified fee cap amount.

Note: If you specified a fee cap percent and a fee cap amount, or you set a fee cap on the fee schedule assigned to the account, Latitude uses the lowest cap amount. Latitude only uses applicable buckets in calculations and only caps applicable buckets. Currently, only the principal bucket is applicable.

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

Related Topics

Search for a Permission or System Code

Data Grids

Surcharge Rules

Clients

Client Fee Schedule

Feedback

Client Fee Schedule

You can add, modify, and delete fee schedules for a client. For more information, see Fee Schedules.

Related Topics

Add a Client Fee Schedule

Modify a Client Fee Schedule

Delete a Client Fee Schedule

Fee Schedules

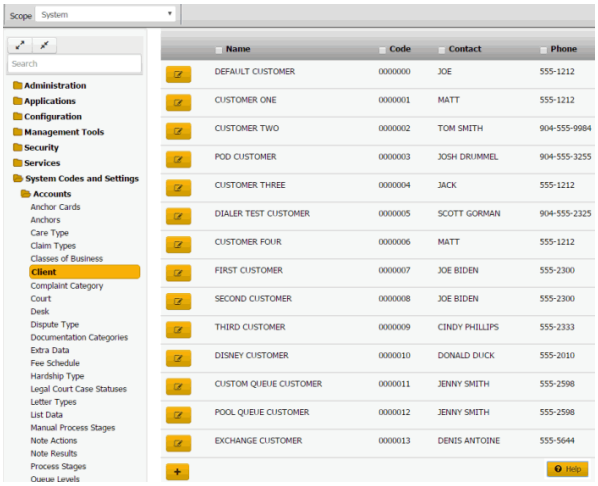
Feedback

Add a Client Fee Schedule

Use the **Fee Schedule Detail** dialog box to add a fee schedule for a client. The fee schedule takes effect on the date you specify and remains in effect until you add a fee schedule with a later effective date.

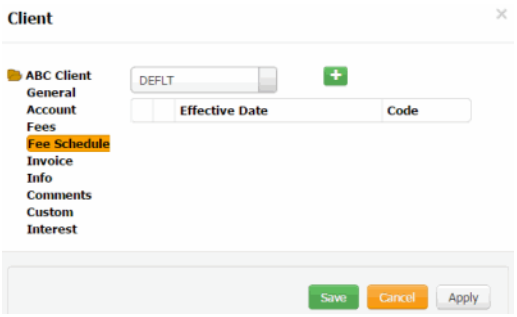
To add a client fee schedule

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Client**.

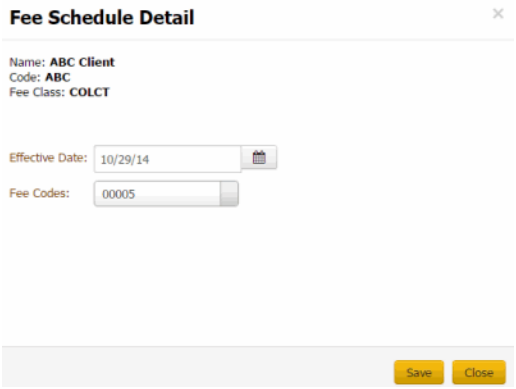


Tip: To limit the clients that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

2. In the data grid, click the Edit icon and then click **Fee Schedule**.



3. In the list box, click the fee class and then click the plus sign (+).



Name: Client's name.

Code: Unique code that identifies the client.

Fee Class: Category of fee schedule.

Effective Date: Date the fee schedule takes effect.

Fee Code: Unique number that identifies the fee schedule to use.

4. Complete the information and then click **Save**.

Related Topics

Search for a Permission or System Code

Data Grids

Client Fee Schedule

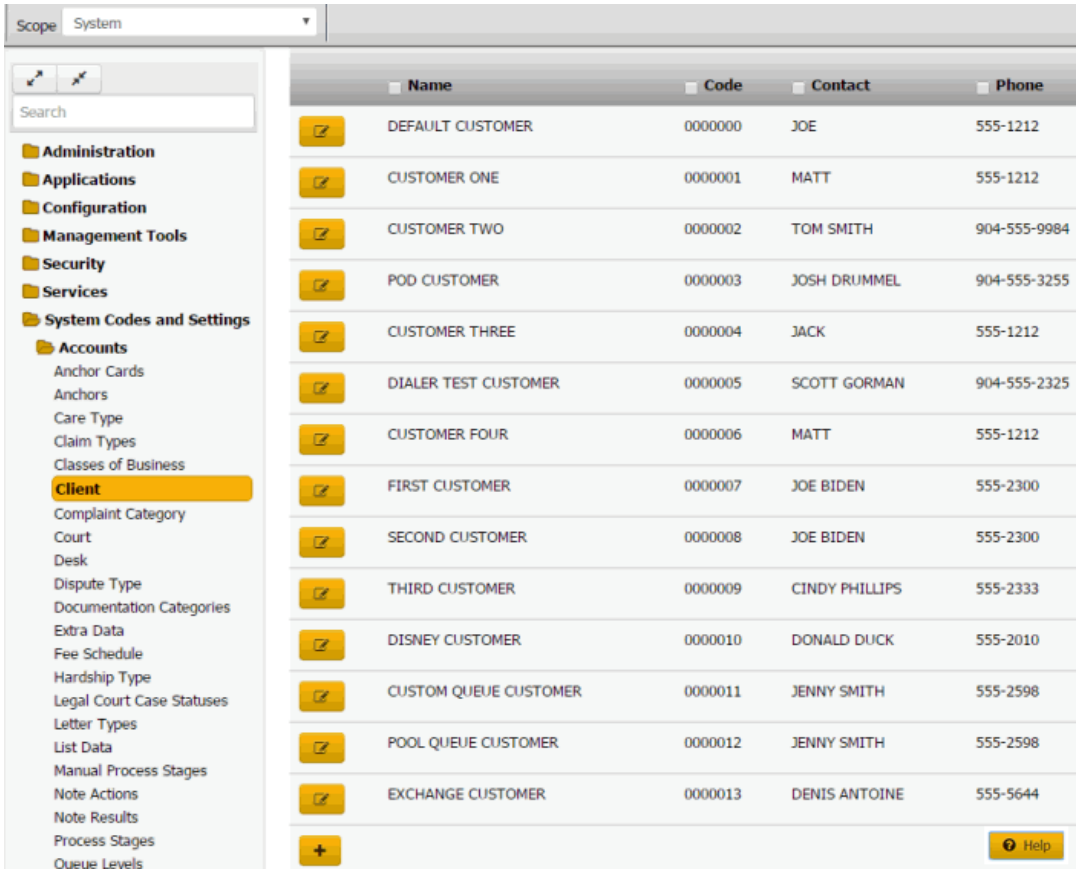
Feedback

Modify a Client Fee Schedule

Use the **Fee Schedule Detail** dialog box to modify a fee schedule for a client. You cannot modify a fee schedule that has an effective date that is earlier than the current date.

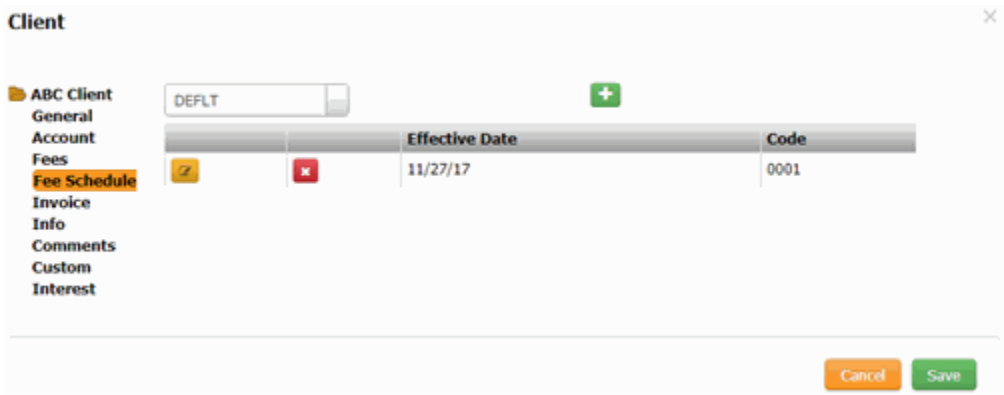
To modify a client fee schedule

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Client**.

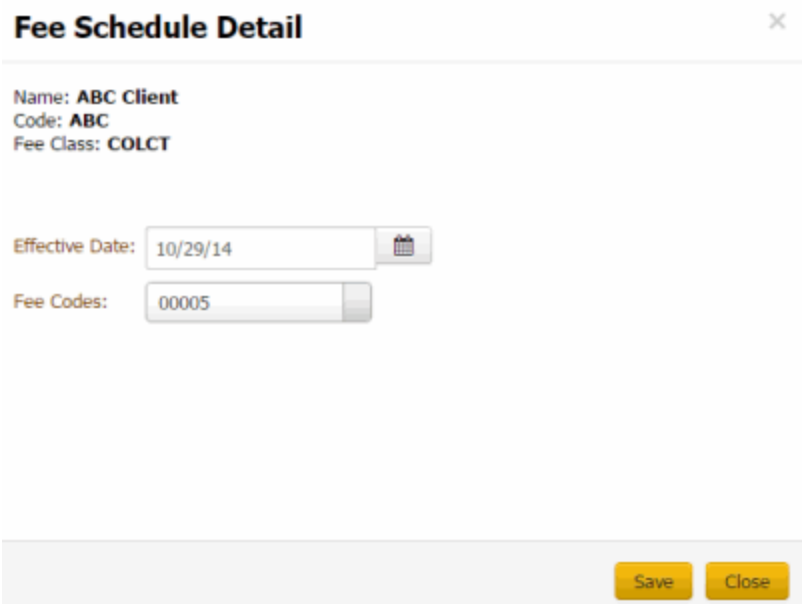


Tip: To limit the clients that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

2. In the data grid, click the Edit icon and then click **Fee Schedule**.



3. In the list box, click the fee class and then, in the data grid, click the Edit icon.



Name: Client's name.

Code: Unique code that identifies the client.

Fee Class: Category of fee schedule. Valid values are:

COLCT = Collector Fee Schedule.

DEFLT: = Client Fee Schedule.

Effective Date: Date the fee schedule takes effect.

Fee Code: Unique number that identifies the fee schedule to use.

4. Modify the information and then click **Save**.

Related Topics

Search for a Permission or System Code

Data Grids

Client Fee Schedule

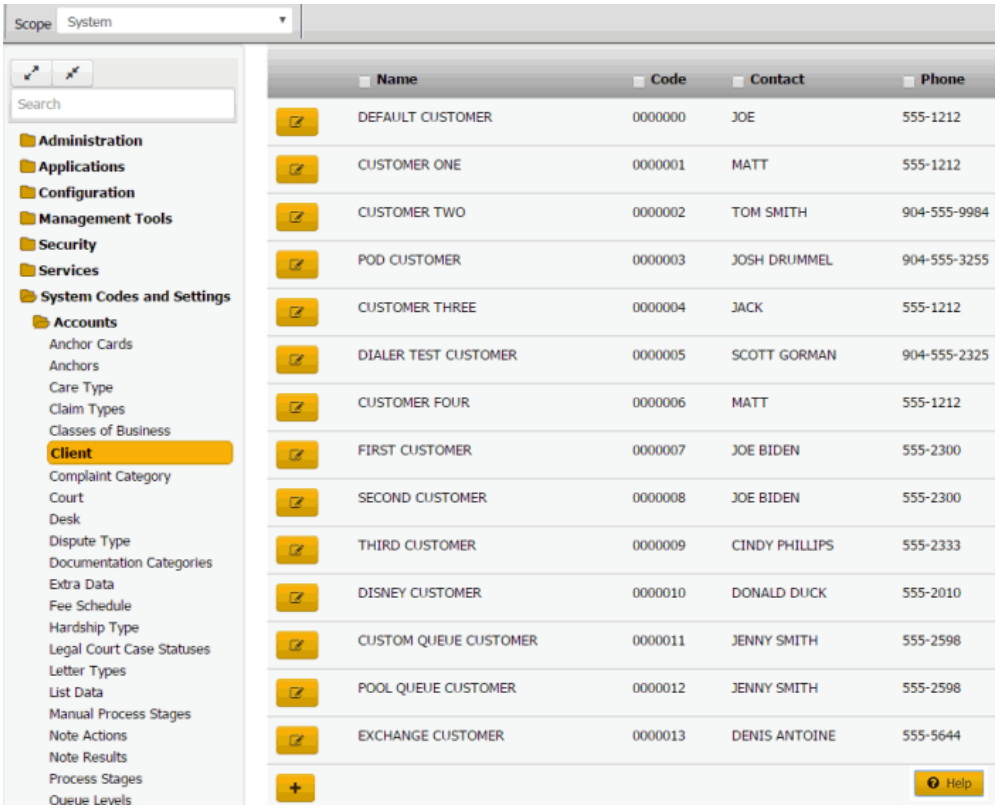
Feedback

Delete a Client Fee Schedule

Use the **Fee Schedule** tab in the **Client** dialog box to delete a fee schedule for a client.

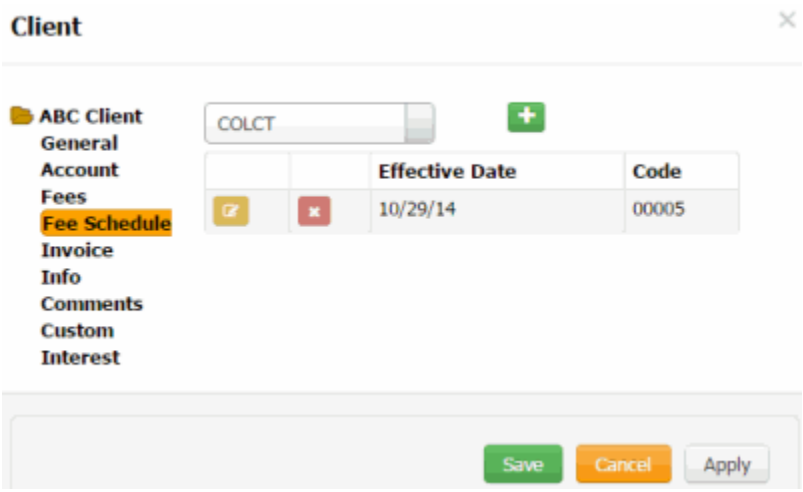
To delete a client fee schedule

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Client**.



Tip: To limit the clients that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

2. In the data grid, click the Edit icon and then click **Fee Schedule**.



3. In the data grid, click the Delete icon and then click **Yes**.

Related Topics

Search for a Permission or System Code

Data Grids

Client Fee Schedule

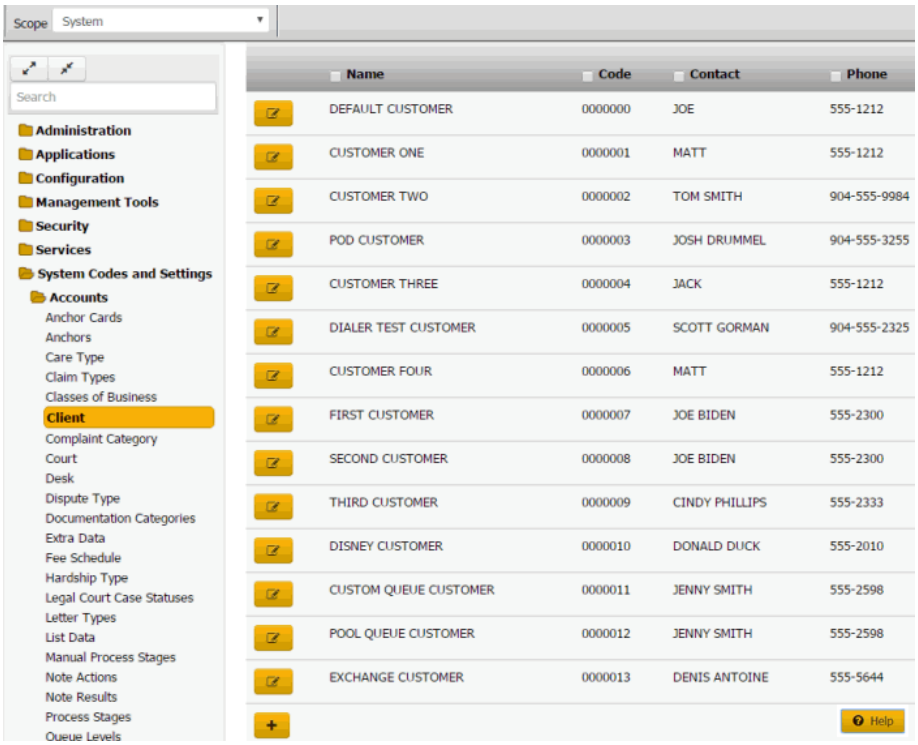
Feedback

Maintain Client Invoice Settings

Use the **Invoice** tab in the **Client** dialog box to maintain invoice settings for a client. These settings apply when invoicing clients using the Invoices program.

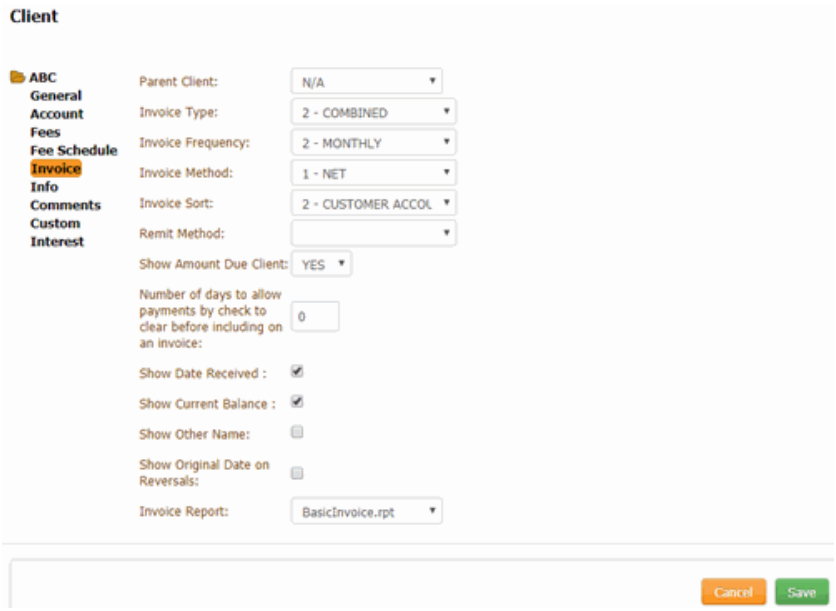
To maintain client invoice settings

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Client**.



Tip: To limit the clients that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

2. In the data grid, click the Edit icon and then click **Invoice**.



Parent Client: Parent client associated to this client for invoicing purposes.

Invoice Type: Type of invoices to create. Valid values are:

> **Combined:** Creates one invoice for all payment types (PA, PC, PU, PAR, PCR, and PUR).
>
> **Separate:** Creates one invoice for PC and PCR, one invoice for PA and PU, and one invoice for PAR and PUR payment types.
>
> **Separate Direct:** Creates one invoice for PC and PCR payment types and a separate invoice for PA, PAR, PU, and PUR payment types.

Invoice Frequency: Indicates how often to invoice the client.

Invoice Method: Method for invoicing the client.

> **Net:** Doesn't include your organization's fee on client invoices.
>
> **Gross:** Includes your organization's fee on client invoices.

Invoice Sort: Order to sort the invoices.

> **Remit Method:** Determines the method for remitting invoices.
>
> **Manual:** Your organization writes checks for the client manually.
>
> **Check**: Your organization uses the Invoices program to print checks for the client.
>
> **ACH Transfer:** Your organization uses the Invoices program to create ACH wire transfers for the client.

Show Amount Due Client: Indicates whether to include the amount due to the client on the invoice.

Number of days to allow payments by check to clear before including on invoice: Number of days to wait before including payments on a client invoice. If the customer's check does not clear, use this option to avoid sending payment information to a client.

Show Date Received, **Current Balance**, **Amount Due Client**, **Other Name**, **Original Date on Reversals:** If selected, the information prints on the client's invoices.

Invoice Report: File to use when creating invoices for the client. This option allows you to use custom invoices for each customer. The default file is **BasicInvoice.rpt**. Import the reports into Latitude to make them available for selection from the list box.

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

Related Topics

Search for a Permission or System Code

Data Grids

Clients

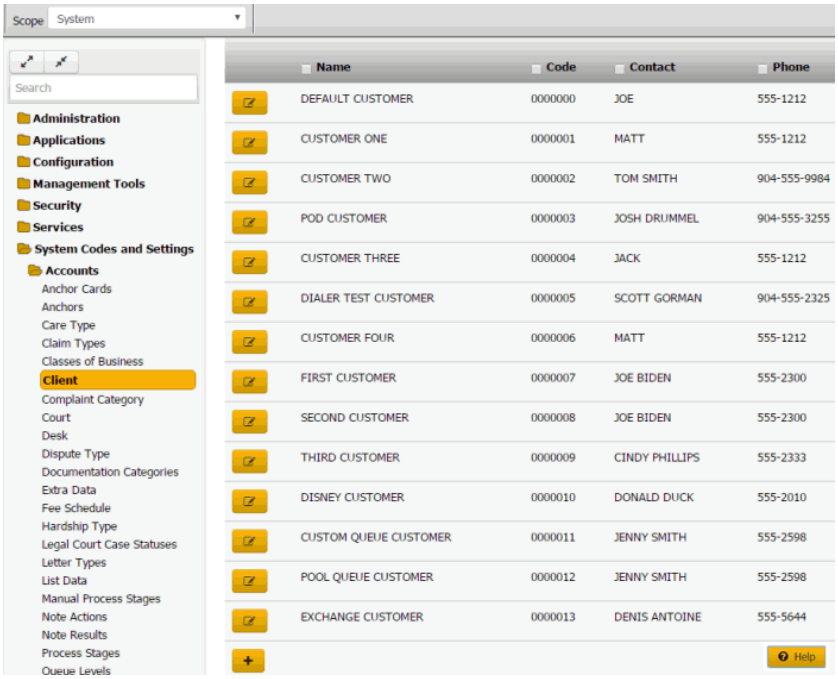
Feedback

Maintain Client Guidelines

Use the **Info** tab in the **Client** dialog box to maintain the work plan, settlement guidelines, and miscellaneous information to display to users working a client's accounts. For more information, see View Client Guidelines.

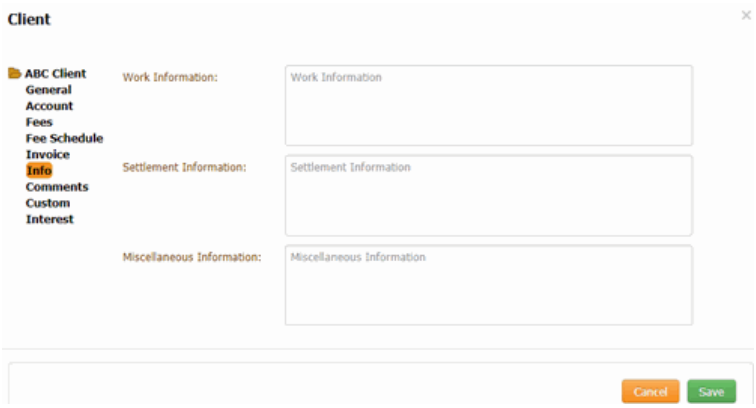
To maintain client guidelines

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Client**.



Tip: To limit the clients that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

2. In the data grid, click the Edit icon and then click **Info**.



Work Information: Information for working this client's accounts.

Settlement Information: Information on what constitutes a settlement on this client's accounts.

Miscellaneous Information: Miscellaneous information such as special client requirements.

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

Related Topics

Search for a Permission or System Code

Data Grids

Clients

View Client Guidelines

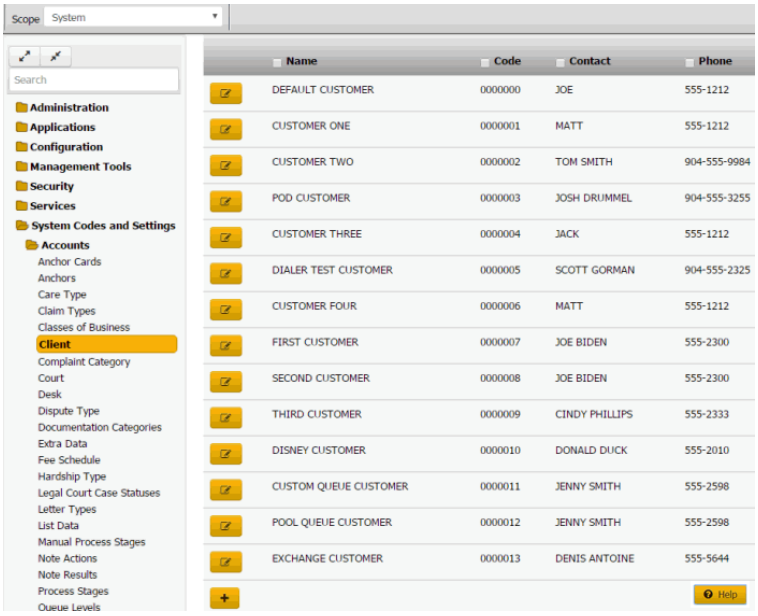
Feedback

Add a Client Comment

Use the **Comments** tab in the **Client** dialog box to add a client comment. Latitude creates comments for changes to client information and flags the comments as "Created by AUDIT." You cannot modify or delete client comments.

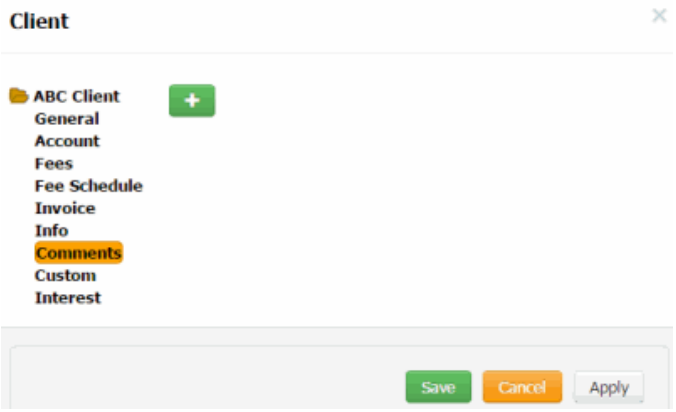
To add a client comment

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Client**.

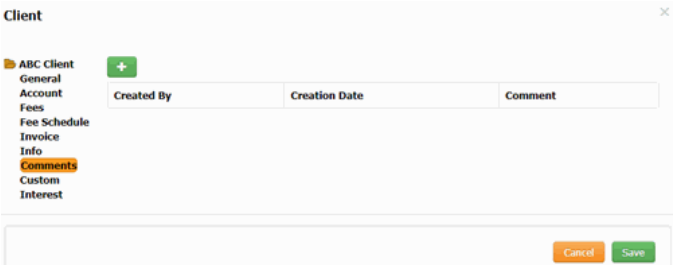


Tip: To limit the clients that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

2. In the data grid, click the Edit icon and then, in the **Client** dialog box, click **Comments**.



3. Click the plus sign (+).



4. Type a comment and then click the **Save** under the **Comment** box.

5. Click **Save**.

Related Topics

Search for a Permission or System Code

Data Grids

Custom Data

Feedback

Custom Data

You can add or modify custom data for a client. This feature allows your organization to capture information for the client that you cannot include elsewhere in Latitude. Custom data includes dates, check box options, numeric values, and text. If your organization configured custom labels, you can add or modify custom data. For more information, see Client Titles.

Related Topics

Maintain Custom Dates

Maintain Custom Options

Maintain Custom Text

Maintain Custom Values

Clients

Client Titles

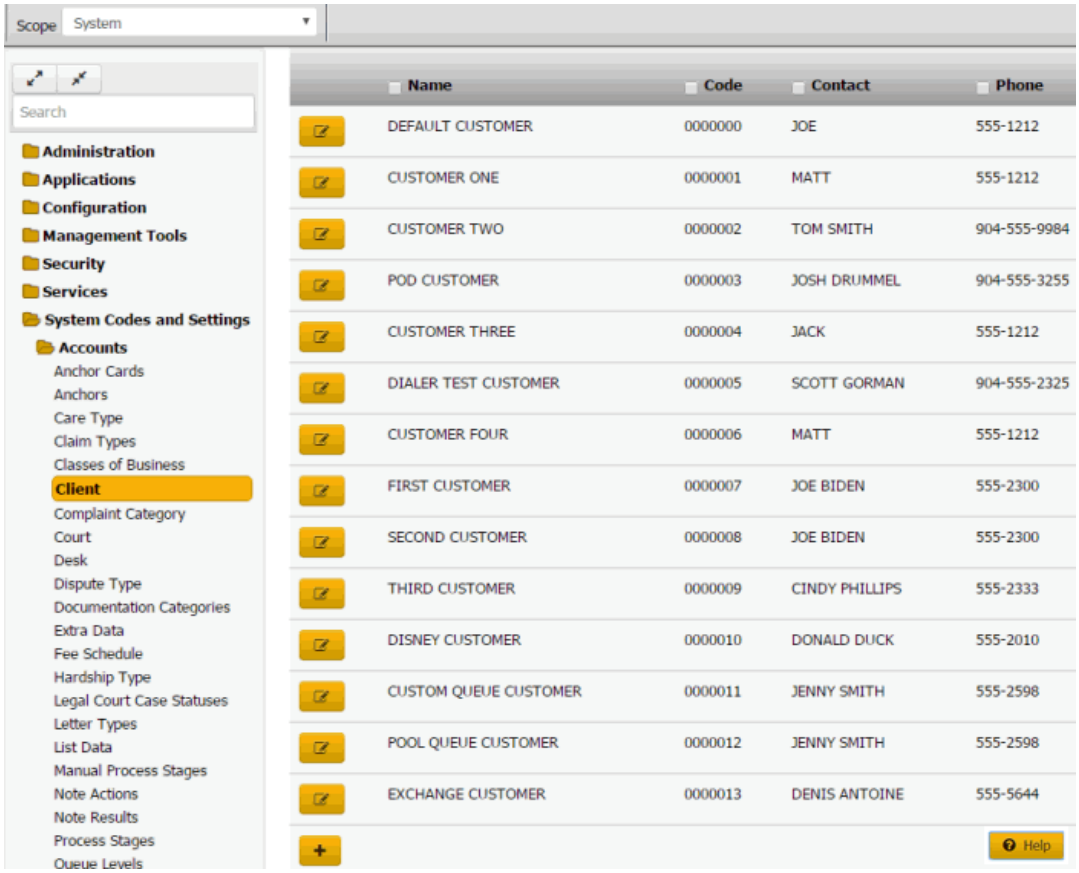
Feedback

Maintain Custom Dates

Use the **Dates** tab in the **Client** dialog box to maintain custom dates for a client. For more information, see Maintain Client Date Titles.

To maintain custom dates

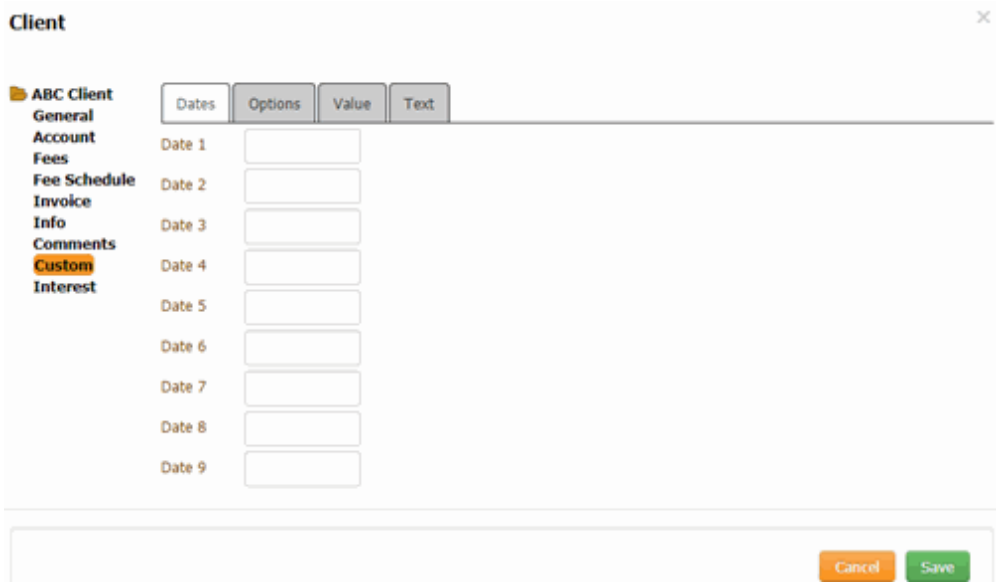
1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Client**.



Tip: To limit the clients that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

2. In the data grid, click the Edit icon and then click **Custom**.

3. Click the **Dates** tab.



4. For each box with a custom label to the right, type a date and then click **Save**.

Related Topics

Search for a Permission or System Code

Data Grids

Custom Data

Maintain Client Date Titles

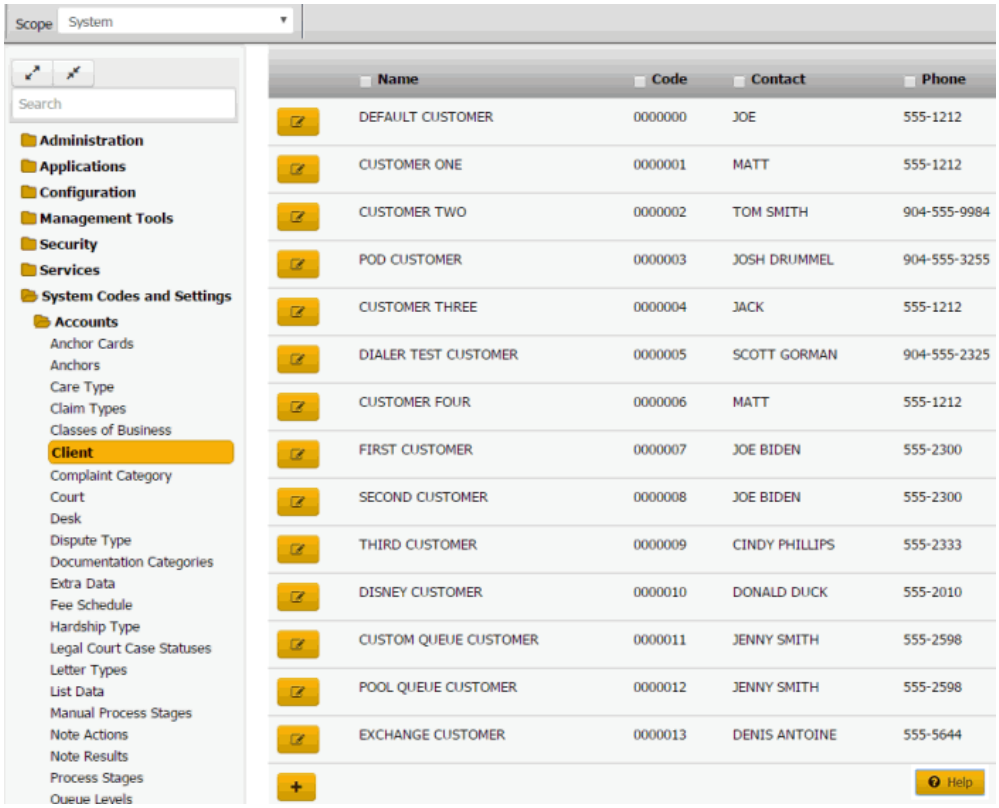
Feedback

Maintain Custom Options

Use the **Options** tab in the **Client** dialog box to maintain custom options for a client. For more information, see Maintain Client Option Titles.

To maintain custom options

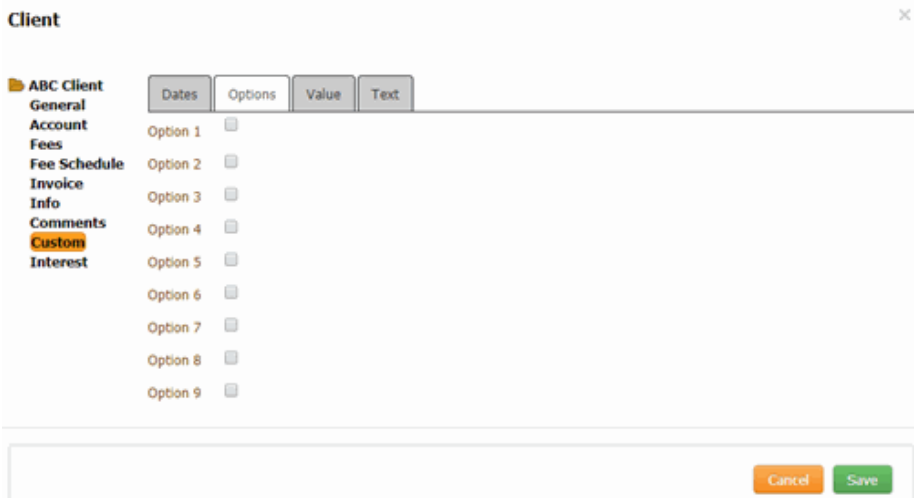
1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Client**.



Tip: To limit the clients that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

2. In the data grid, click the Edit icon and then click **Custom**.

3. Click the **Options** tab.



4. For each check box with a custom label to the right, do one of the following:
    - To indicate a true statement, select the check box.
    - To indicate a false statement, clear the check box.
5. Click **Save**.

Related Topics

[Search for a Permission or System Code]

[Data Grids]

[Custom Data]

[Maintain Client Option Titles]

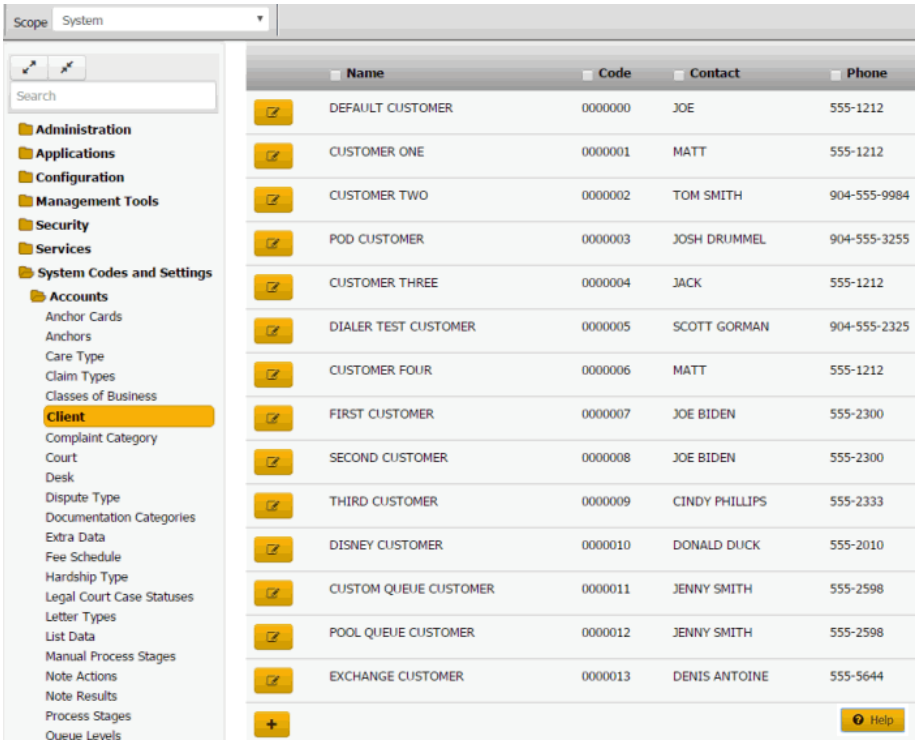
[Feedback]

Maintain Custom Text

Use the **Text** tab in the **Client** dialog box to maintain custom alphanumeric values for a client. For more information, see [Maintain Client Text Titles].

To maintain custom text

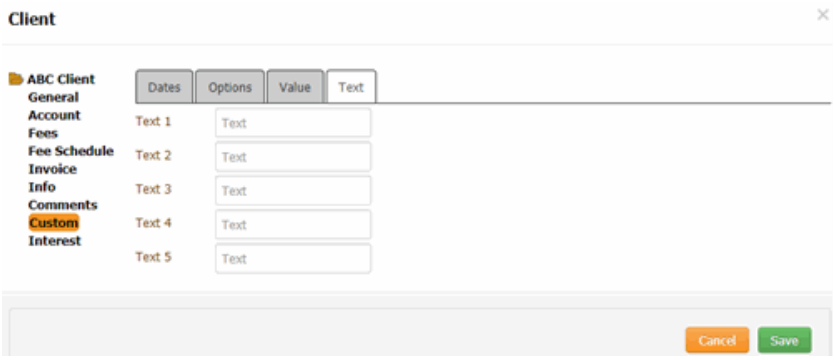
1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Client**.



Tip: To limit the clients that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

2. In the data grid, click the Edit icon and then click **Custom**.

3. Click the **Text** tab.



4. For each box with a custom label to the right, type information and then click **Save**.

Related Topics

Search for a Permission or System Code

Data Grids

Custom Data

Maintain Client Text Titles

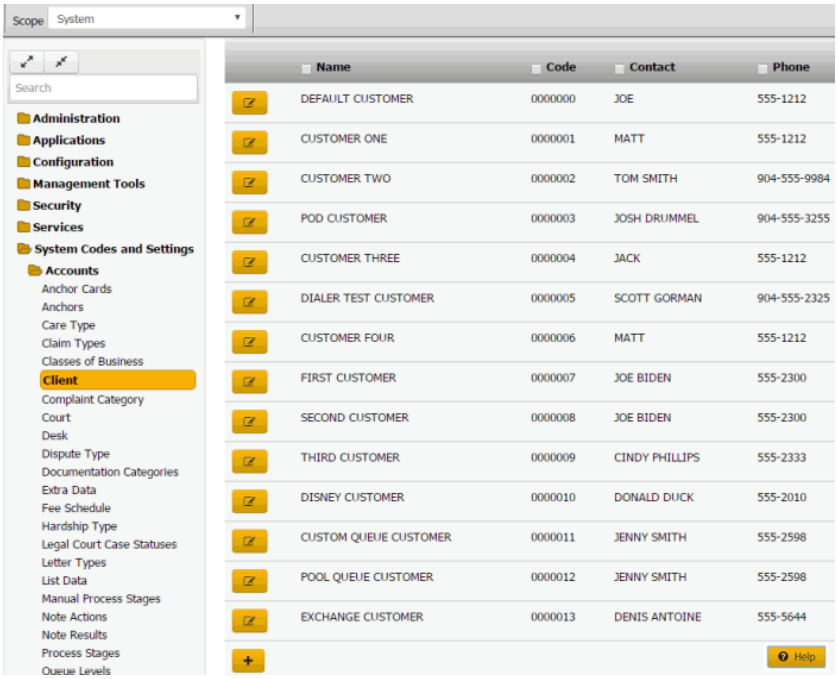
Feedback

Maintain Custom Values

Use the **Values** tab in the **Client** dialog box to maintain custom numeric values for a client. For more information, see Maintain Client Value Titles.

To maintain custom values

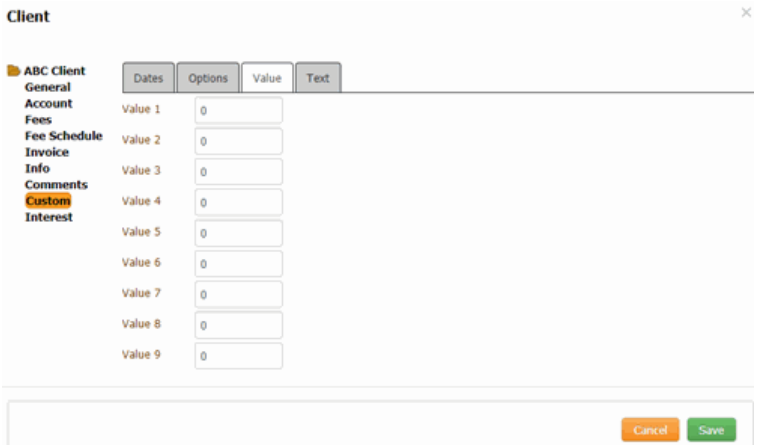
1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Client**.



Tip: To limit the clients that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

2. In the data grid, click the Edit icon and then click **Custom**.

3. Click the **Values** tab.



4. For each box with a custom label to the right, type a numeric value and then click **Save**.

Related Topics

Search for a Permission or System Code

Data Grids

Custom Data

Maintain Client Value Titles

Client Interest

Feedback

Client Interest

You can add, modify, and delete interest for a client. If a user starts interest for an account, Latitude uses the client interest rate instead of the account-level interest rate. If a user stops interest on an account, Latitude uses the account-level interest rate instead of the client interest rate. For more information, see Manage Interest.

Related Topics

Add Client Interest

Modify Client Interest

Delete Client Interest

Clients

Manage Interest

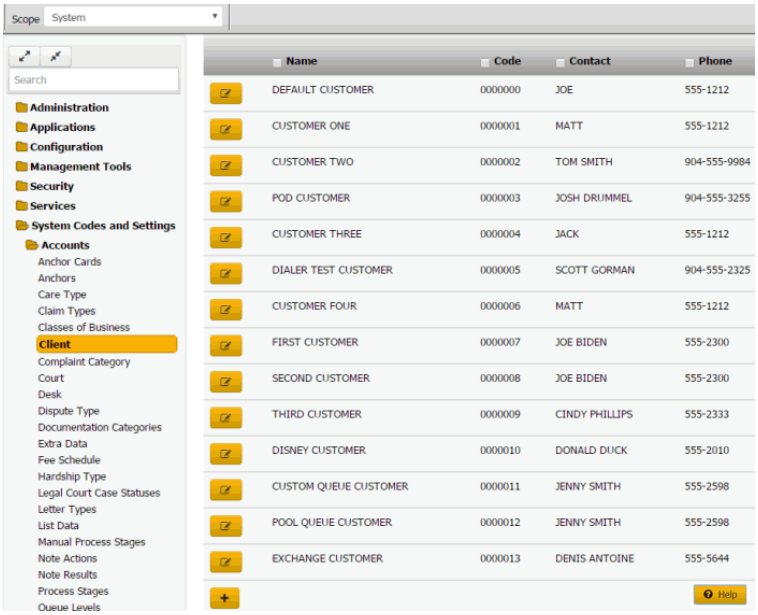
Feedback

Add Client Interest

Use the **Interest Detail** dialog box to add an interest rate used to calculate interest for a client.

To add client interest

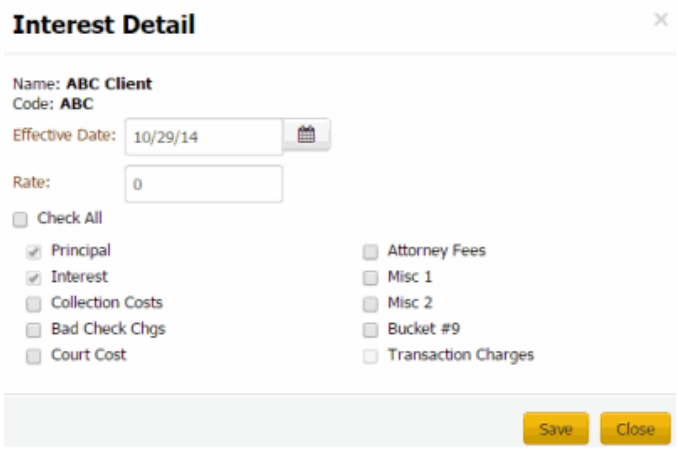
1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Client**.



Tip: To limit the clients that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

2. In the data grid, click the Edit icon and then click **Interest**.

3. Click the plus sign (+).



Name: Client's name.

Code: Unique code that identifies the client.

Effective Date: Date the interest rate takes effect.

Rate: Interest rate as a whole number. For example, if the interest rate is 7 percent, type "7" in the box.

Check All: If selected, Latitude selects all the money bucket check boxes.

Principal: If selected, Latitude includes principal when calculating interest.

Collection Costs: If selected, Latitude includes collection costs when calculating interest.

Bad Check Charges: If selected, Latitude includes bad check charges when calculating interest.

Court Costs: If selected, Latitude includes court costs when calculating interest.

Attorney Fees: If selected, Latitude includes attorney fees when calculating interest.

Misc 1 and **Misc 2:** If selected, Latitude includes miscellaneous costs when calculating interest.

Bucket #9: If selected, Latitude includes the amount in this money bucket when calculating interest.

Transaction Charges: If selected, Latitude includes transaction charges when calculating interest.

4. Complete the information and then click **Save**.

Related Topics

Search for a Permission or System Code

Data Grids

Client Interest

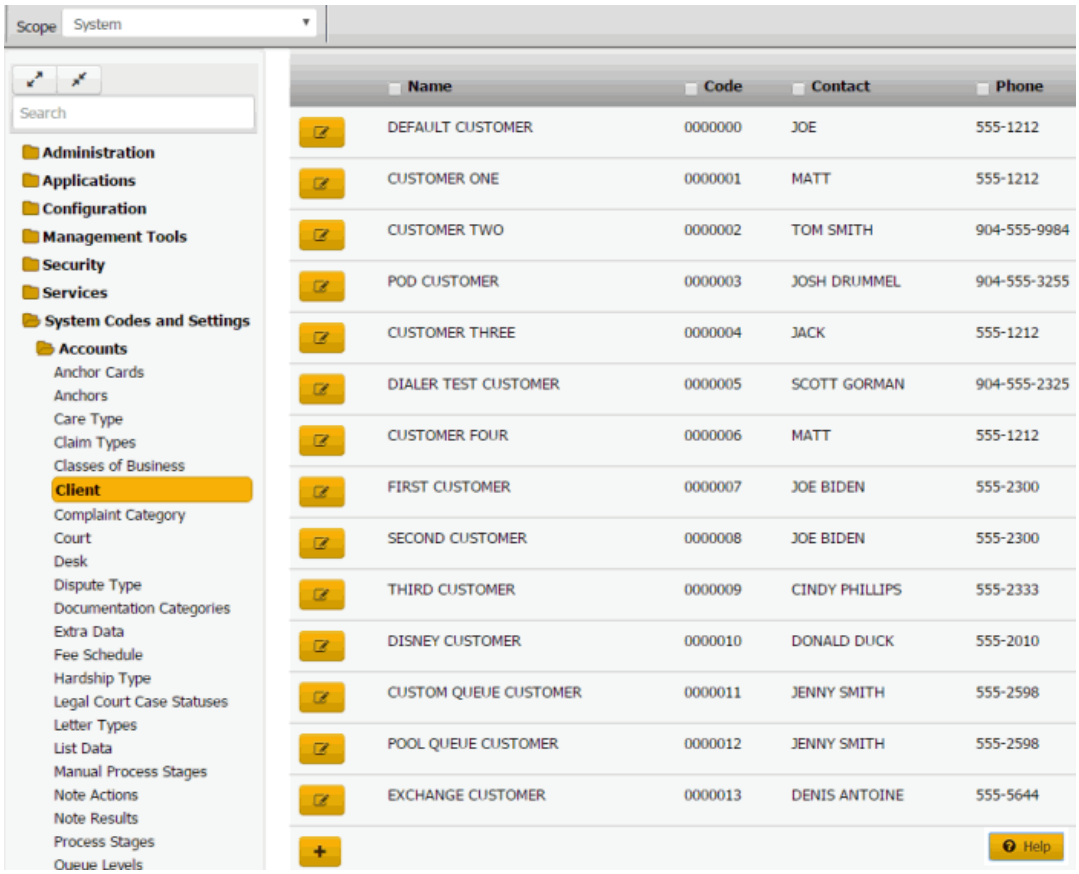
Feedback

Modify Client Interest

Use the **Interest Detail** dialog box to modify an interest rate for a client. You can modify the effective date, interest rate, and money buckets to include in interest calculations.

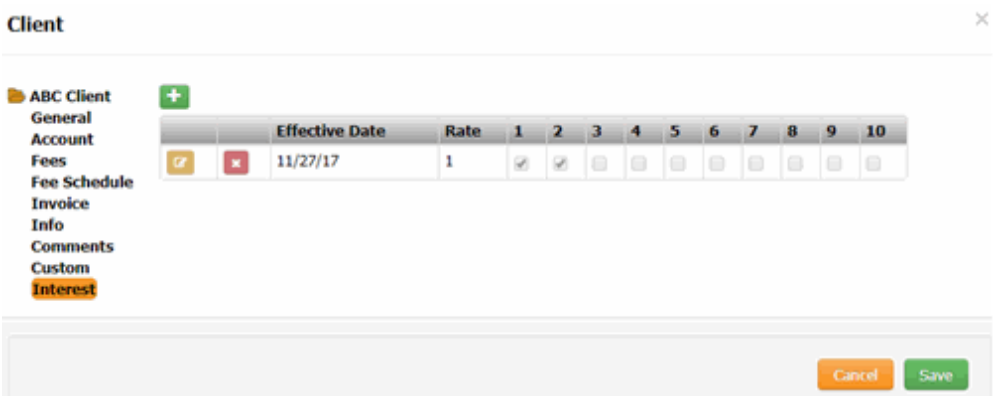
To modify client interest

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Client**.

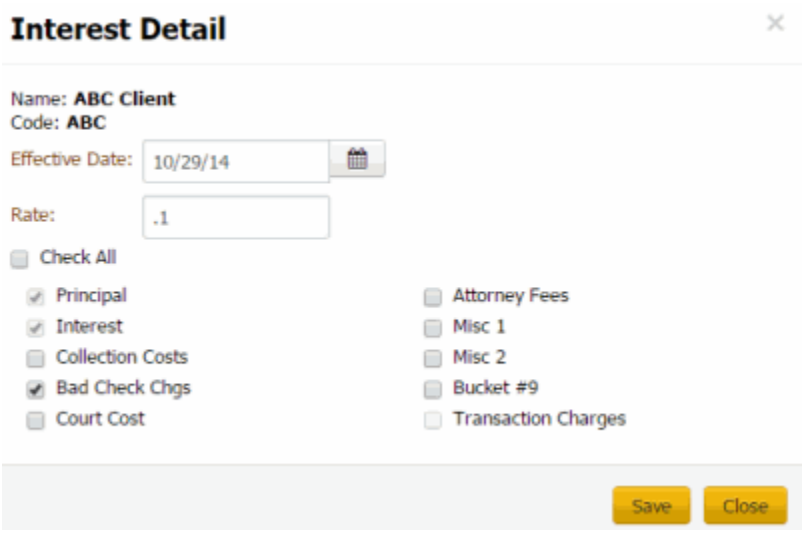


Tip: To limit the clients that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

2. In the data grid, click the Edit icon and then click **Interest**.



3. In the data grid, click the Edit icon.



Name: Client's name.

Code: Unique code that identifies the client.

Effective Date: Date the interest rate takes effect.

Rate: Interest rate as a whole number. For example, if the interest rate is 7 percent, type "7" in the box.

Check All: If selected, Latitude selects all the money bucket check boxes.

Principal: If selected, Latitude includes principal when calculating interest.

Collection Costs: If selected, Latitude includes collection costs when calculating interest.

Bad Check Charges: If selected, Latitude includes bad check charges when calculating interest.

Court Costs: If selected, Latitude includes court costs when calculating interest.

Attorney Fees: If selected, Latitude includes attorney fees when calculating interest.

Misc 1 and **Misc 2:** If selected, Latitude includes miscellaneous costs when calculating interest.

Bucket #9: If selected, Latitude includes the amount in this money bucket when calculating interest.

Transaction Charges: If selected, Latitude includes transaction charges when calculating interest.

4. Modify the information and then click **Save**.

Related Topics

Search for a Permission or System Code

Data Grids

Client Interest

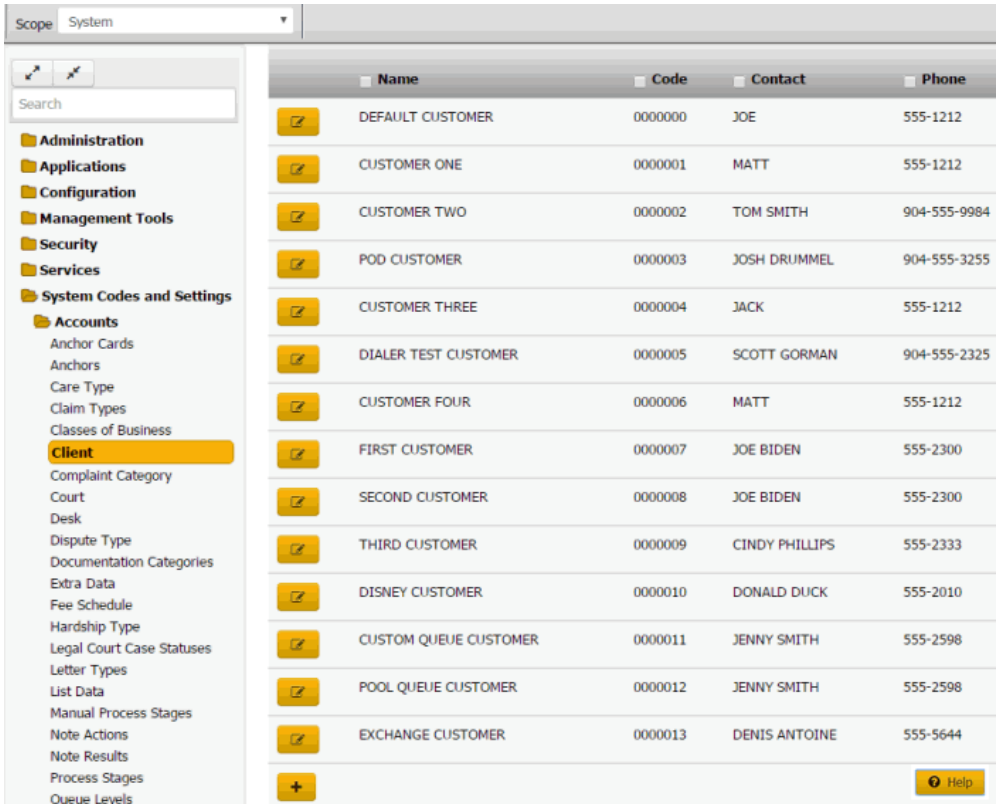
Feedback

Delete Client Interest

Use the **Interest** tab in the **Client** dialog box to delete an interest rate for a client.

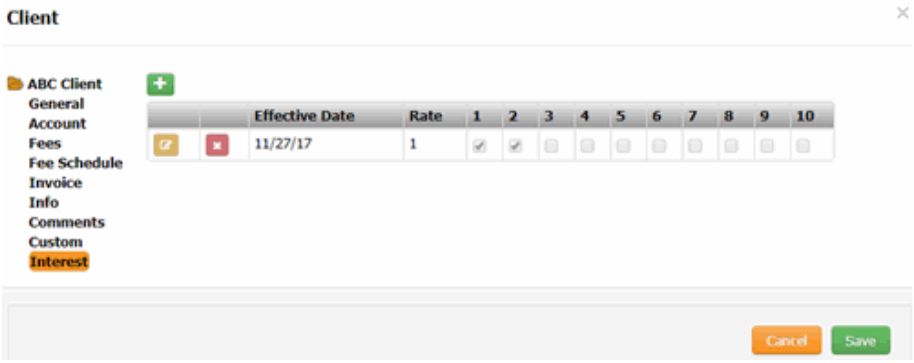
To modify client interest

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Client**.



Tip: To limit the clients that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

2. In the data grid, click the Edit icon and then click **Interest**.



3. In the data grid, click the Delete icon and then click **Yes**.

Related Topics

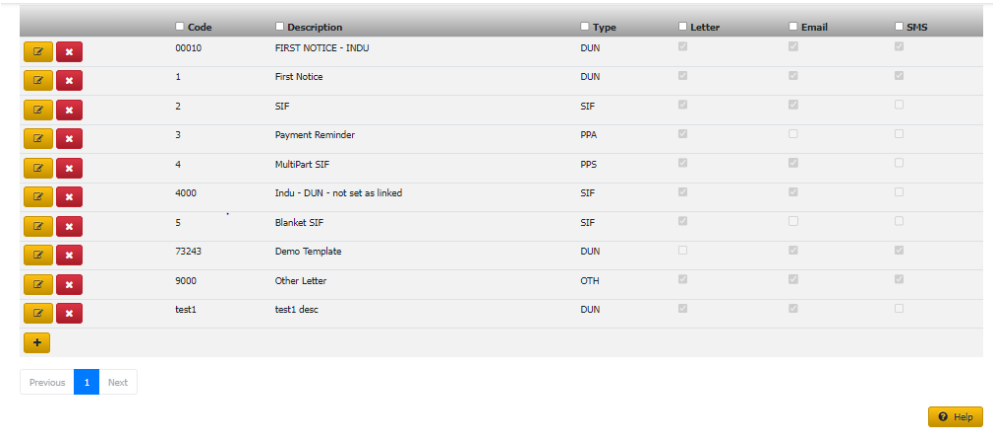
Search for a Permission or System Code

Data Grids

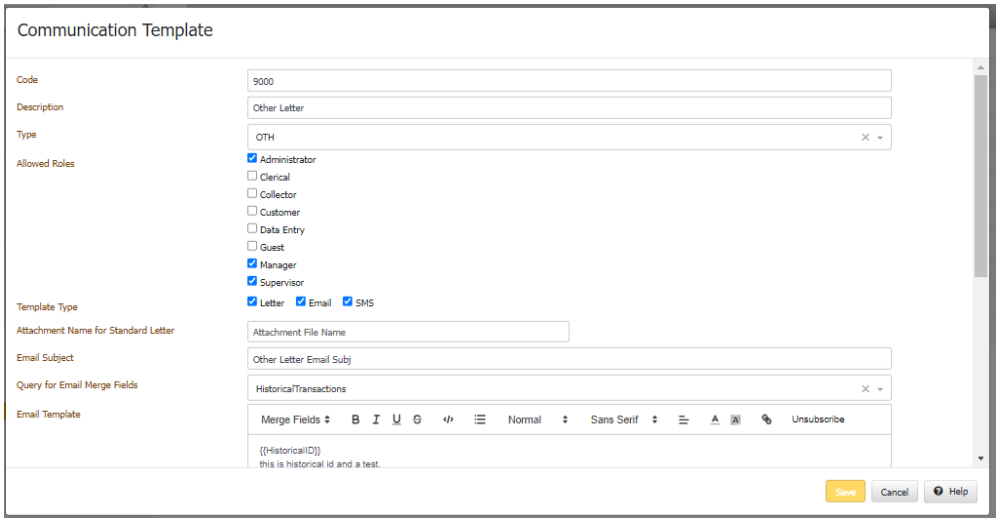
Client Interest

Communication Templates

A New **Communication Templates** setting has been created using which users can configure **Email** and **SMS** templates for each letter code. **Letter codes** which existed before this change can only be configured as **Letters** and option to send by **Email or SMS** will be disabled**.**



A New letter configuration called **Communication Templates** has been created to configure if a letter code can be sent has **Letter, Email, SMS**. Different templates can be set for **Letter, Email** and **SMS** and all the templates support mail merge functionality.



A new **Communication Templates** setting has been created using which users can configure **Email** and **SMS** templates for each letter code. Letter codes that existed before this change can only be configured as Letters and the option to send by Email or SMS will be disabled.

Using **Communication Templates**, we can provide an option in outbound Emails and SMS using which debtors can **unsubscribe** from such communications.

New setting "**Attachment Name for Standard Letter**" added for Email Template Type. This is the name that will be given to the **PDF** of a standard letter template when sent as an attachment in an outbound email.

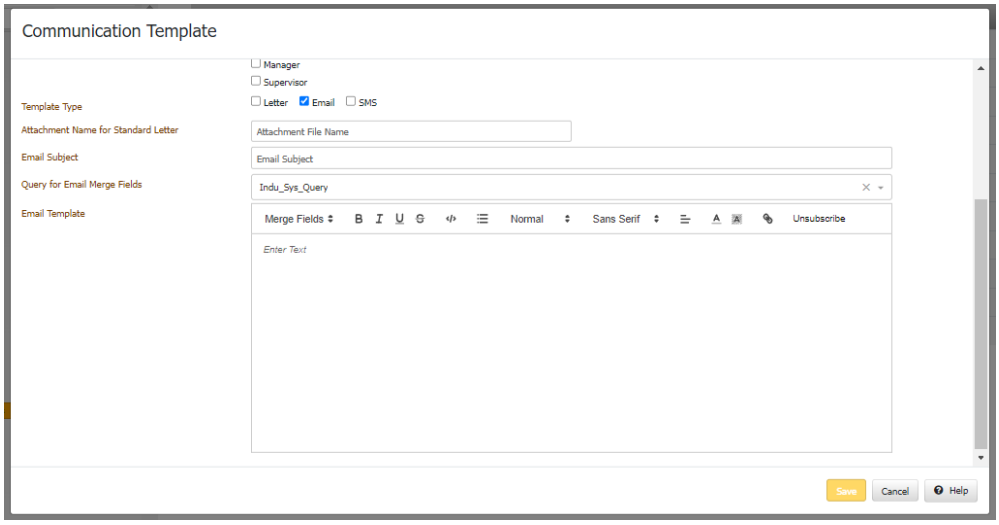
Communication Templates **Add/Edit** dialog for Email and SMS now has a new **Query Name drop down** that can be used to populate additional fields in the **Merge Fields drop down**.

Merge Fields drop down will have some account and letter request related fields populated by default. So a template can also be created by using only the default merge fields as well.

The **Query Name drop down** is populated with System Queries created using the Account Analysis application.

If the selected query has any columns from the **Debtors table**, the data for these columns will be fetched for the Recipient to whom the **Email/SMS** is to be sent out.

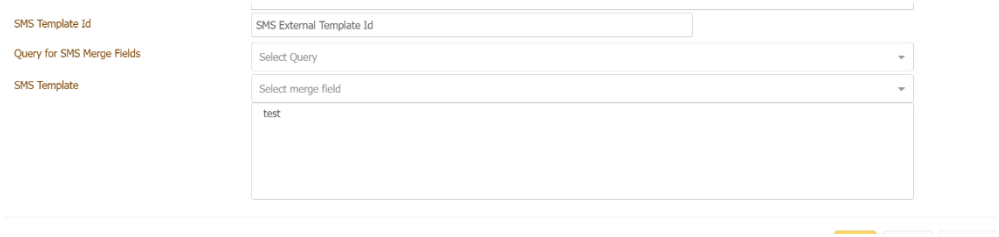
Once the system receives the **unsubscribe message**, the consent for that email id/phone number will be removed and unless it's reset no communication will be sent to those **Email id/Phone Number**.



SMS Template Id: This needs to be configured only for SMS templates and only when the actual template has been configured externally on the SMS vendor side. In such a scenario, our SMS template will contain a list of custom fields that need to be populated in the external template. Each field will be in a separate line in the template and will be a key-value pair where the key is the custom field name and the value is the custom field value. The key and value will be separated by a colon

Query for SMS Merge Fields: It will have some account and letter request related fields populated by default. So a template can also be created by using only the default merge fields as well.

SMS Template: It has list of default fields selected based on query.



Complaint Categories

Complaint Categories

You can add, modify, and delete complaint categories, such as contact strategy, regulatory, and service. Users specify a complaint category when adding complaints. For more information, see Add a Complaint.

Related Topics

Add a Complaint Category

Modify a Complaint Category

Delete a Complaint Category

Add a Complaint

Modify a Complaint

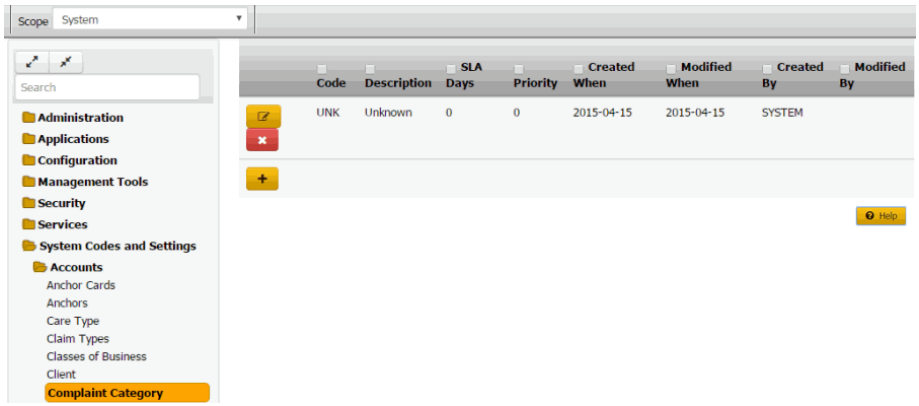
Feedback

Add a Complaint Category

Use the **Complaint Category** panel to add a complaint category.

To add a complaint category

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Complaint Category**.



Code: Code that identifies the complaint category.

Description: Description of the complaint category.

SLA Days: Number of days after receiving the complaint that you have to resolve it before breaching the Service Level Agreement (SLA).

Priority: Priority level that determines when the Complaint Department works the complaint.

Created When: Date and time a user created this complaint category.

Modified When: Date and time a user last modified this complaint category.

Created By: User who created this complaint category.

Modified By: User who last modified this complaint category.

2. Click the plus sign (+). A blank row appears in the data grid.
3. Complete the information and then click the check mark.

Related Topics

Complaint Categories

Account Codes

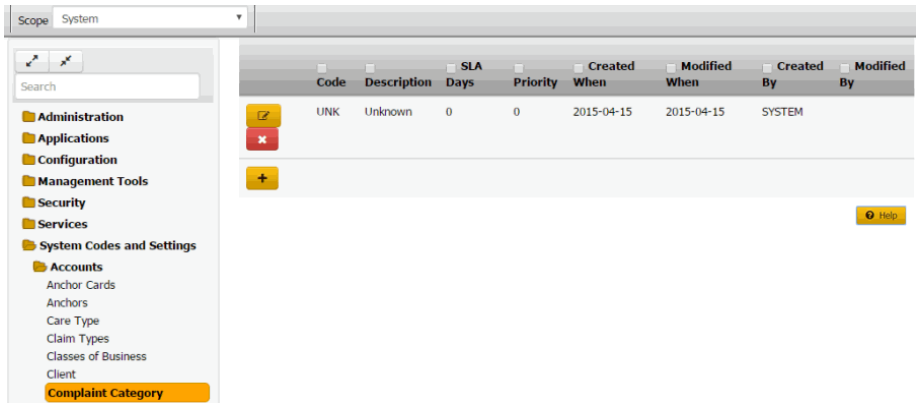
Feedback

Modify a Complaint Category

Use the **Complaint Category** panel to modify a complaint category.

To modify a complaint category

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Complaint Category**.



   Code: Code that identifies the complaint category.

   Description: Description of the complaint category.

   SLA Days: Number of days after receiving the complaint that you have to resolve it before breaching the Service Level Agreement (SLA).

   Priority: Priority level that determines when the Complaint Department works the complaint.

   Created When: Date and time a user created this complaint category.

   Modified When: Date and time a user last modified this complaint category.

   Created By: User who created this complaint category.

   Modified By: User who last modified this complaint category.

2. Click the Edit icon. The complaint category appears in edit mode.

3. Modify the information and then click the check mark.

Related Topics

Complaint Categories

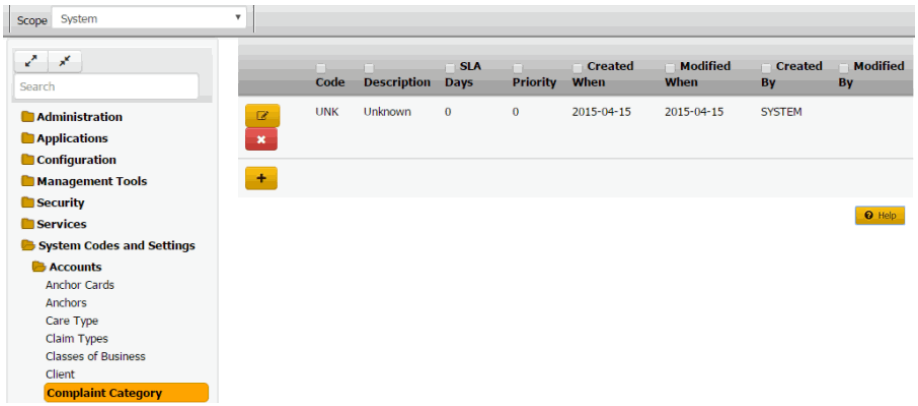
Account Codes

Delete a Complaint Category

Use the **Complaint Category** panel to delete a complaint category.

To delete a complaint category

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Complaint Category**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Complaint Categories

Account Codes

Courts

Feedback

Courts

You can search for, add, modify, and delete courts of law. Users specify a court when assigning a court to a legal case. For more information, see Assign a Court.

Related Topics

Add a Court of Law

Modify a Court of Law

Delete a Court of Law

Search for a Permission or System Code

Data Grids

Account Codes

Assign a Court

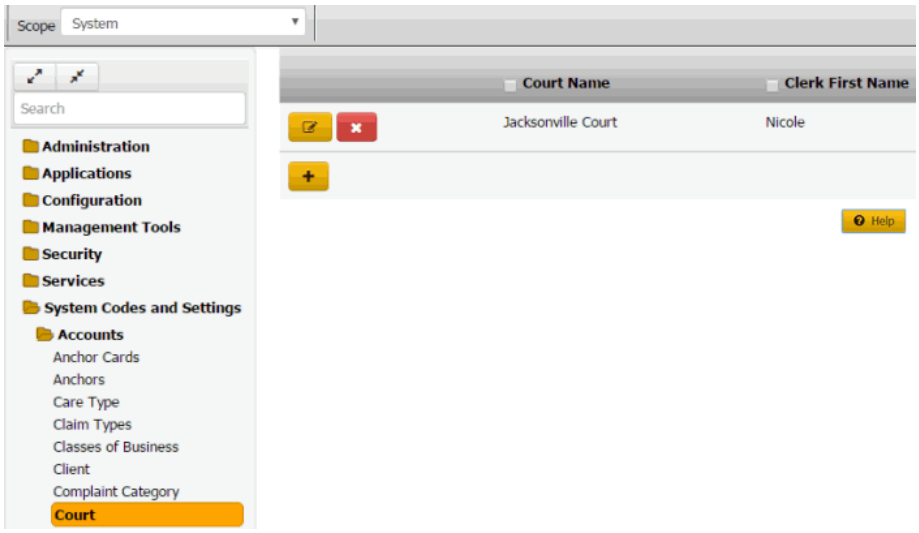
Feedback

Add a Court of Law

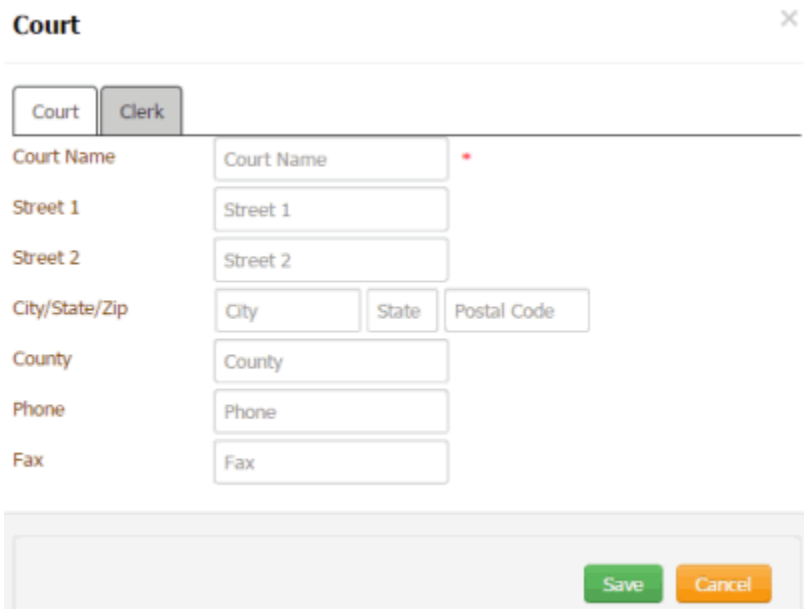
Use the **Court** dialog box to add a court of law.

To add a court of law

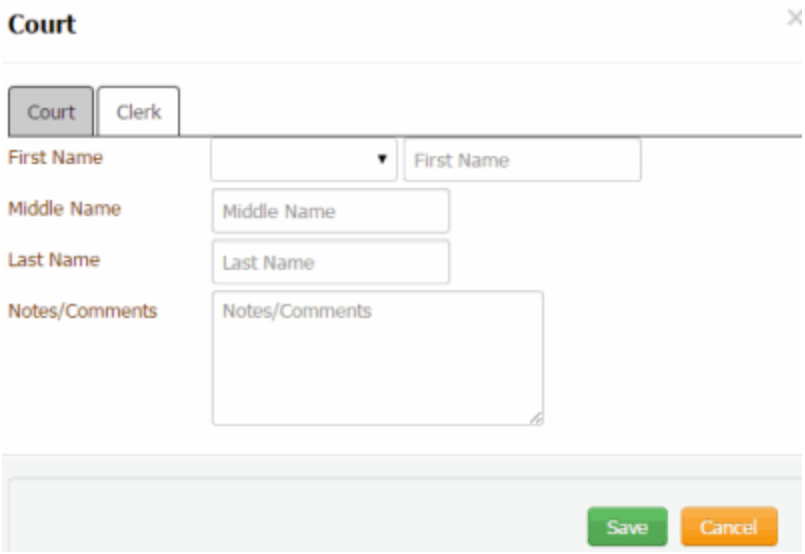
1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Court**.



2. Click the plus sign (+). The **Court** dialog box appears.



3. Complete the information and then click the **Clerk** tab.



4. Complete the information and then click **Save**.

Related Topics

Search for a Permission or System Code

Data Grids

Courts

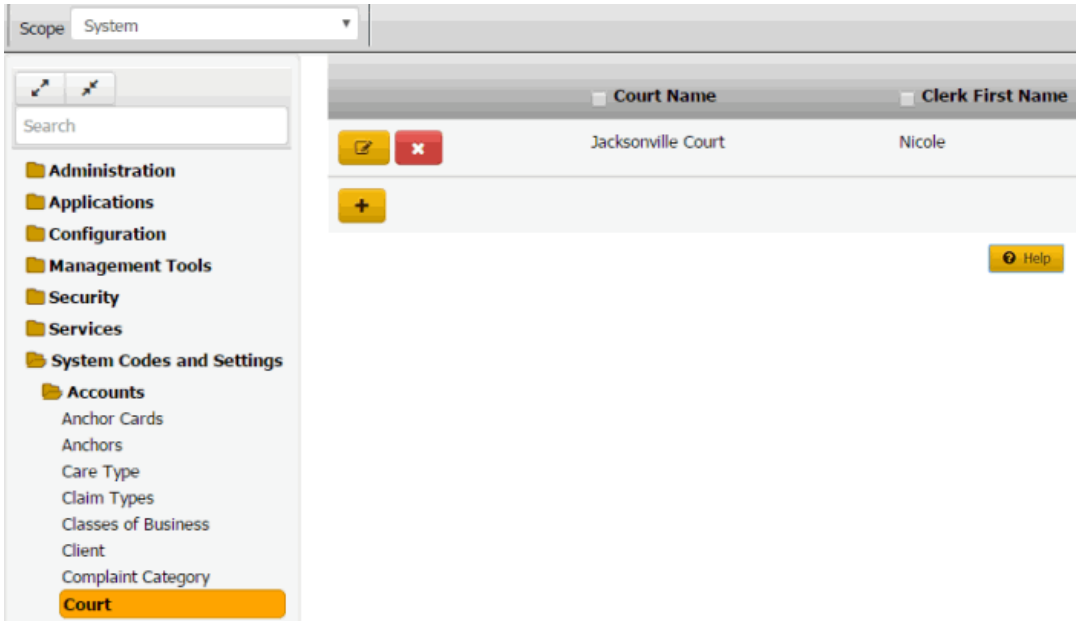
Feedback

Modify a Court of Law

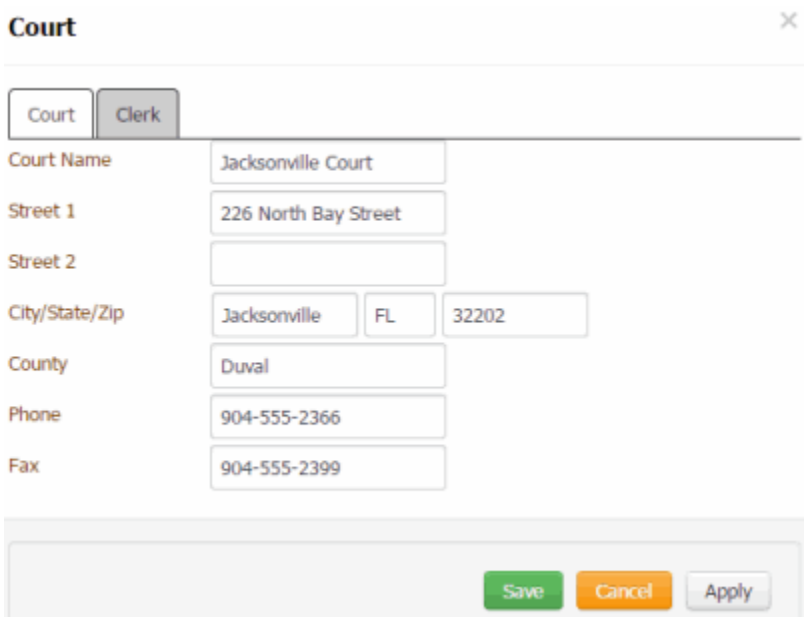
Use the **Court** dialog box to modify a court of law.

To modify a court of law

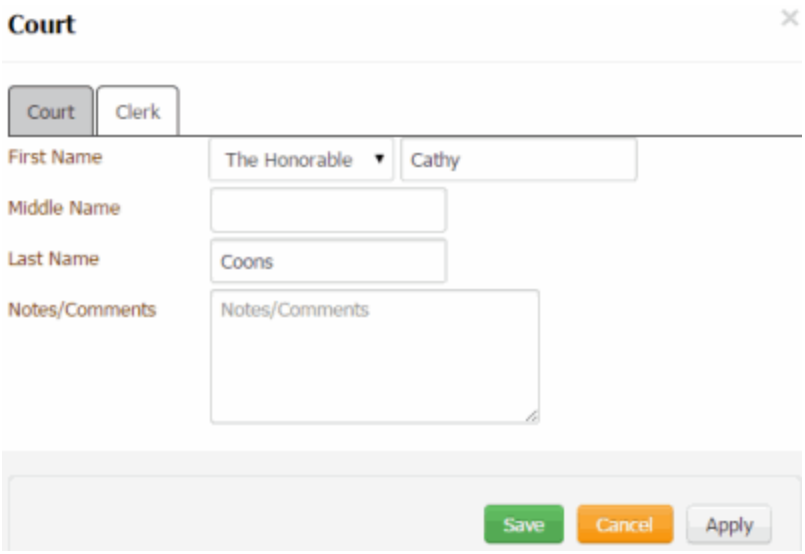
1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Court**.



2. Click the Edit icon . The **Court** dialog box appears.



3. Modify the information and then click the **Clerk** tab.



4. Modify the information and then click **Save**.

Related Topics

Search for a Permission or System Code

Data Grids

Courts

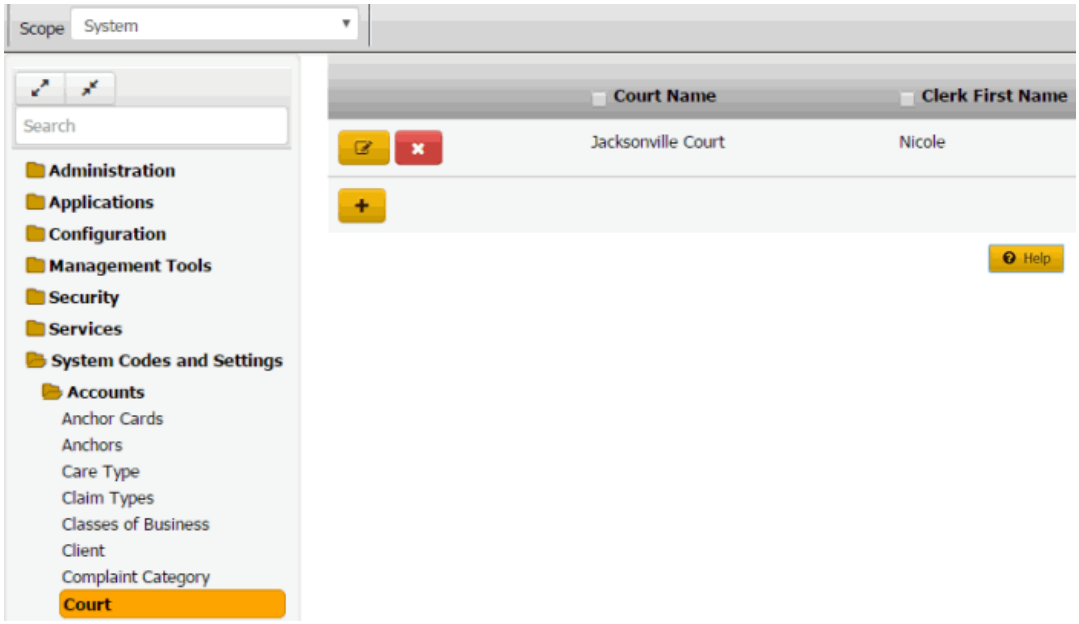
Feedback

Delete a Court of Law

Use the **Court** panel to delete a court of law.

To delete a court of law

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Court**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Search for a Permission or System Code

Data Grids

Courts

Custom Panel Mapping

Feedback

Custom Panel Mapping

You can search for, add, modify, and delete custom anchor cards and reference panels. You map a custom anchor card or reference panel to a query that specifies the data to display in the card or panel. You can map a single query to one anchor card and one reference panel only.

For more information about creating queries for custom anchor cards or reference panels, see "Custom Panel Query Creator" in the Latitude Console documentation.

Related Topics

Search for a Custom Anchor Card or Reference Panel

Add a Custom Anchor Card or Reference Panel

Modify a Custom Anchor Card or Reference Panel

Delete a Custom Anchor Card or Reference Panel

Search for a Permission or System Code

Data Grids

Account Codes

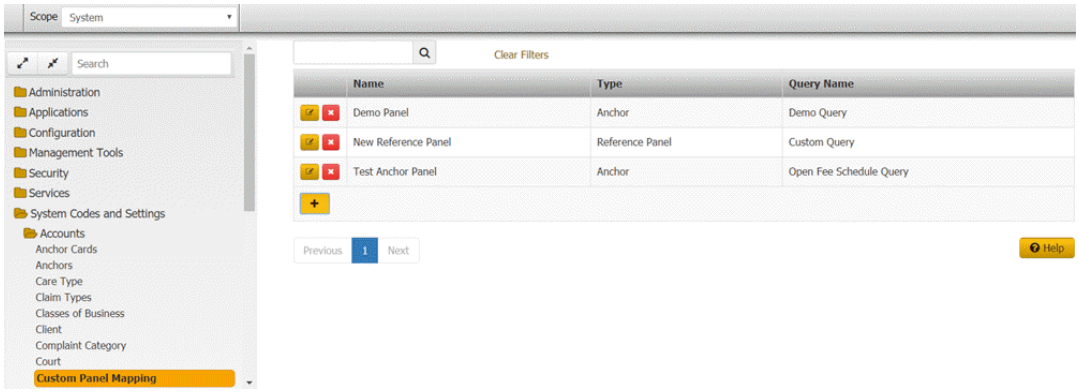
Feedback

Search for a Custom Anchor Card or Reference Panel

Use the **Custom Panel Mapping** panel to search for a custom anchor card or reference panel.

To search for a custom anchor card or reference panel

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Custom Panel Mapping**.



2. In the **Search** box in the **Custom Panel Mapping** panel, type one or more characters to search and then press **Enter** or click the Search icon. The system searches the custom anchor card or reference panel name, type, and query name for a match. It displays only the custom anchor cards and reference panels that match your search criteria.

3. To clear the search criteria, click **Clear Filters**. The system displays all custom panel mappings.

Related Topics

Custom Panel Mapping

Data Grids

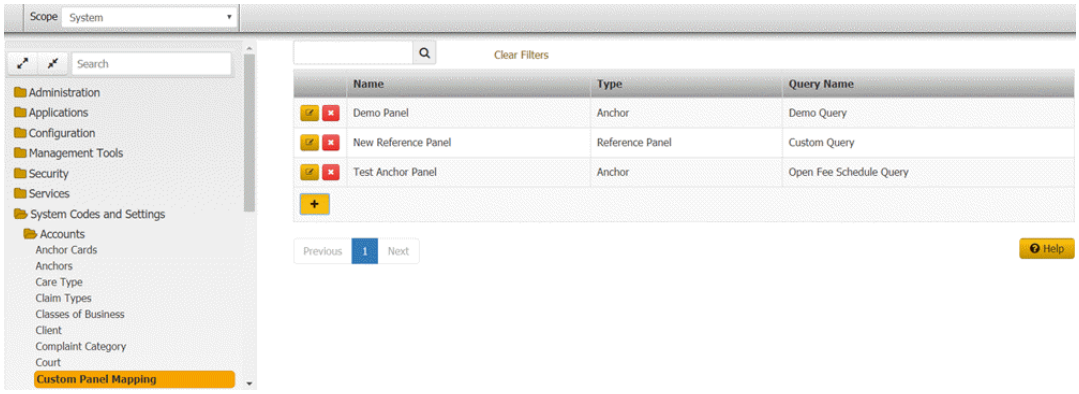
Feedback

Add a Custom Anchor Card or Reference Panel

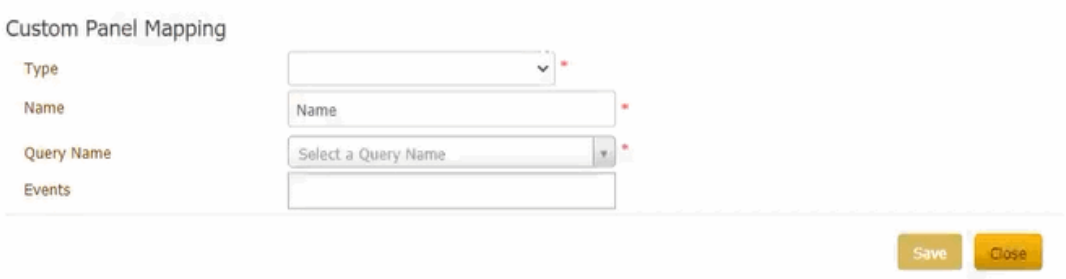
Use the **Custom Panel Mapping** panel to add a custom anchor card or reference panel.

To add a custom anchor card or reference panel

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Custom Panel Mapping**.



2. Click the plus sign (+). The **Custom Panel Mapping** dialog box appears.



Type: Type of display to use for the mapped content. Valid values are:

- **Anchor:** Displays the mapped content in a custom anchor card.
- **Reference Panel:** Displays the mapped content in a custom reference panel.
- **Reference Panel with URL:** Opens the web page for the specified URL inside the custom reference panel and displays the mapped content within the web page.
- **Task Panel with URL:** Opens the web page for the specified URL inside the custom task panel and displays the mapped content within the web page.
- **Anchor Panel with URL:** Opens the web page for the Micro Angular App URL inside the custom anchor panel and displays the mapped content within the web page.
    - Note: Use **Anchor Panel with URL** option for Using Micro Angular App.

Name: Name to assign to the custom anchor card or reference panel.

Query Name: Name of the query to map to the custom anchor card or reference panel.

Note: You can map a single query to one anchor card and one reference panel only.

Events: Events that, when triggered, refresh the custom anchor card or reference panel. If you selected **Reference Panel with URL** from the **Type** list box, the **URL** box displays instead of the **Events** box.

URL: URL of the web page to display inside the custom reference panel. (just up to "documents". Latitude picks up the value and appends it.) If you selected **Anchor** or **Reference Panel** from the **Type** list box, the **Events** box displays instead of the **URL** box. If you select **Anchor Panel with URL** from the **Type** list box, then **Events** and **URL** boxes display.

Note: While Using Micro Angular App, you must add the App location URL.

Column name: Field specified in the query to display in the custom anchor card or reference panel.

Display Name: Data type to assign to the field.

Parameter:

Field: Field specified in the query to display in the custom anchor card or reference panel. If the value is "TheData" (which represents a miscellaneous extra field), you can modify the value in this box.

Param Name: Name of the field (without spaces) to display in the custom anchor card or reference panel.

3. Complete the information and then click **Save**. One of the following occurs:

- If you mapped a custom anchor card, the system adds the custom anchor card to the list of available anchor cards that you can associate to an anchor. For more information about anchor cards, see Anchor Cards.

- If you mapped a custom reference panel, the system adds the custom reference panel to the list of available reference panels in the Reference Panels permission. For more information about the permission, see Reference Panels Permission.

4. Do one of the following:

   - If you mapped a custom anchor card, add the anchor card to an anchor to allow users to view the card. For more information, see Add an Anchor Card to an Anchor.

   - If you mapped a custom reference panel, select the reference panel in the Reference Panels permission to allow users to view the panel. For more information, see Reference Panels Permission.

Related Topics

Custom Panel Mapping

Account Codes

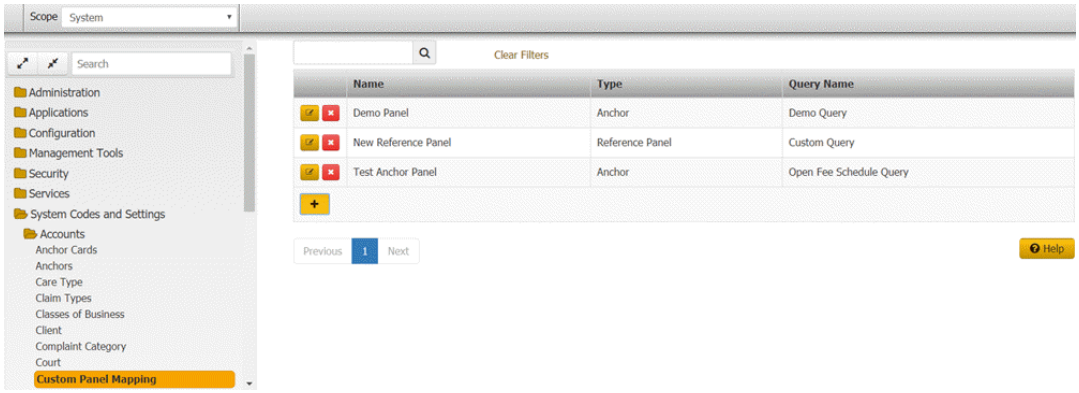
Feedback

Modify a Custom Anchor Card or Reference Panel

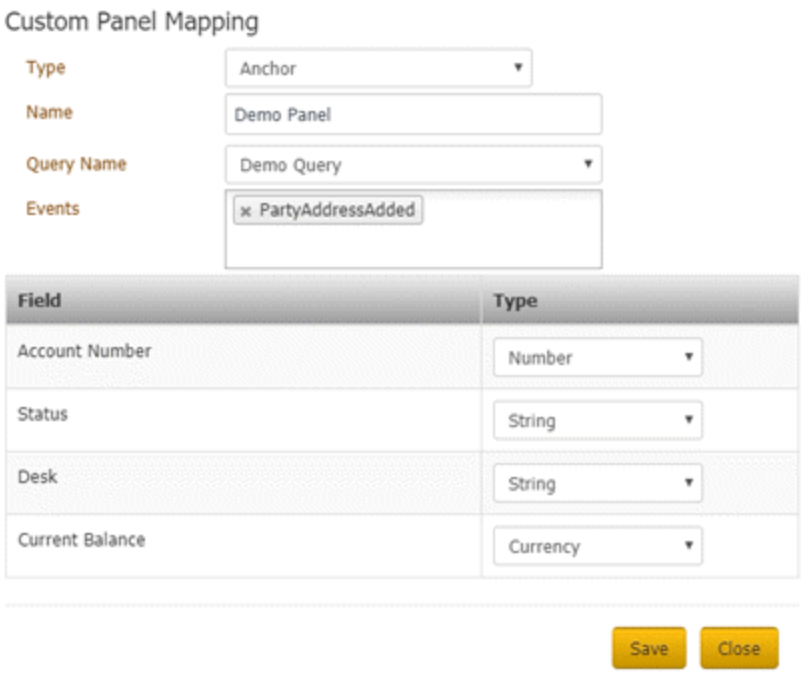
Use the **Custom Panel Mapping** panel to modify a custom anchor or reference panel.

To modify a custom anchor card or reference panel

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Custom Panel Mapping**.



2. Click the Edit icon. The **Custom Panel Mapping** dialog box appears.



Type: Type of display to use for the mapped content. Valid values are:

- **Custom anchor card:** Displays the mapped content in an anchor card.
- **Reference panel:** Displays the mapped content in a reference panel.
- **Reference panel URL:** Displays the mapped content in a reference panel along with a URL.

Name: Name of the custom anchor card or reference panel.

Query Name: Name of the query mapped to the custom anchor card or reference panel.

Note: You can map a single query to one anchor card and one reference panel only.

Events: Events that, when triggered, refresh the custom anchor card or reference panel.

Field: Field specified in the query to display in the custom anchor card or reference panel.

Type: The field's data type.

3. Modify the information and then click **Save**. One of the following occurs:
   - If you changed the mapping from a custom reference panel to a custom anchor card, the system adds the card to the list of available anchor cards. The system removes the custom reference panel from the list of available reference panels in the Reference Panels permission.
   - If you changed the mapping from a custom anchor card to a custom reference panel, the system adds the panel to the list of available reference panels in the Reference Panels permission. The system removes the custom anchor card from the list of available anchor cards and removes it from the associated anchor.
4. Do one of the following:
   - If you changed the mapping from a custom reference panel to a custom anchor card, add the anchor card to an anchor to allow users to view the card. For more information, see Add an Anchor Card to an Anchor.

- If you changed the mapping from a custom anchor card to a custom reference panel, select the reference panel in the Reference Panels permission to allow users to view the panel. For more information, see Reference Panels Permission.

Related Topics

Custom Panel Mapping

Account Codes

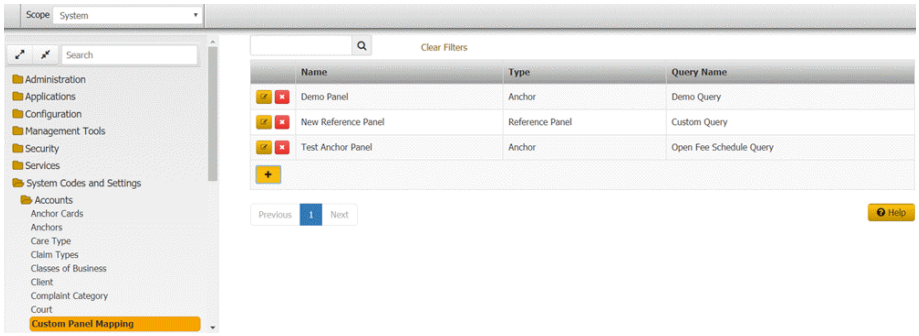
Feedback

Delete a Custom Anchor Card or Reference Panel

Use the **Custom Panel Mapping** panel to delete a custom anchor card or reference panel.

To delete a custom anchor card or reference panel

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Custom Panel Mapping**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Custom Panel Mapping

Account Codes

Micro Angular App

Micro Angular App

You can create, deploy a Micro Angular App into the Server.

Related Topics

Using Micro Angular App

Create a Micro Angular App

Deploy Micro Angular App into the Server

Micro Angular App Design Recommendations

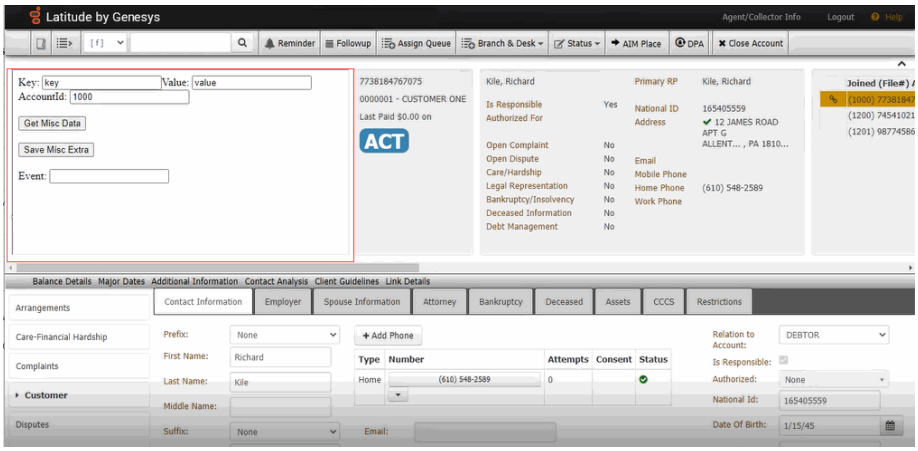
Using Micro Angular App

To use micro angular app, do the following:

1. Add a custom anchor card. For more information, see Add a Custom Anchor Card or Reference Panel.
2. Add an Anchor. For more information, see Add an Anchor.

3. In the **Latitude by Genesys** page, click **Agent Desktop** tab. The **Open Interactions** panel appears.
4. Click the required file number in the **Open Interactions** panel, Micro Angular App appears.

Below shown is the sample Micro Angular App



This Micro Angular App is designed so that it works with the Events using the admin settings.

- To save miscellaneous extra data using the sample app, type **Key** and **Value** information in their respective boxes and then click **Save Misc Extra** button. The information gets saved in the **Misc Extra** panel and the **Events** panel also.
- To view the previous miscellaneous information, click Get Misc Data button, the information gets displayed in the **Key** and **Value** boxes.

Related Topics

Custom Panel Mapping

Account Codes

Anchors

Create a Micro Angular App

1. Create a new project by running **ng new CustomPanelTestApp**
2. Create a new component **ng generate component CustomPanelTest**
3. Add HTML code that you want to see on the Anchor Panel. Refer to Micro Angular App Design Recommendations.
4. Create a new service in Custom Panel folder. In that service, call the existing APIs. (GET, SAVE).

```
import { Injectable } from '@angular/core';
import { HttpClient, HttpHeaders } from '@angular/common/http';


@Injectable({ providedIn: 'root' })
export class CustomPanelTestService {
  constructor(private httpClient: HttpClient) {}


  public getMiscExtra(accountId: number) {
    return this.httpClient.get(`latapi/accountapi/MiscExtra?accountId=${accountId}`);
  }
  public saveMiscData(data :any) {

    return this.httpClient.post(`latapi/accountapi/SaveMisc`,data);
  }
  }
```

5. Call the APIs in the component and verify if you are receiving the response or not.
6. Create a new folder **API-Interceptor** and create a new service in that folder. In this service, write the code to change the URL and then send the authorization key values in the request header.

```
import { HttpEvent, HttpHandler, HttpInterceptor, HttpRequest } from "@angular/common/http";
import { Injectable } from "@angular/core";
import { Observable } from "rxjs";

@Injectable({
  providedIn :'root'
})
export class ApiInterceptorService implements HttpInterceptor {
  constructor(){}

  intercept(req:HttpRequest<any> ,next :HttpHandler):Observable<HttpEvent<any>>{
    const uri=document.location.href;
    const clean_uri =uri.substring(0,uri.indexOf('?'));
    const baseUri=clean_uri.replace('/custom/customPanelTestApp/','');
    req.headers.append('Lat-ApiKey','585a525a-3c47-4871-89f4-7f7d6e5a5d06');
    const apiReq = req.clone({url:`${baseUri}/${req.url}`});
    return next.handle(apiReq);
  }

}
```

7. Add reference of the interceptor service in the app.module. Also, add the reference for CustomPanelTestComponent.

```
src > app > app.module.ts > ...
import { AppRoutingModule } from './app-routing.module';
import { AppComponent } from './app.component';
import { CustomPanelTestComponent } from './custom-panel-test/custom-panel-test.component';
import {  HttpClientModule, HTTP_INTERCEPTORS } from '@angular/common/http';
import { ApiInterceptorService } from './api-interceptor/api-interceptor.service';
import { FormsModule } from '@angular/forms';


@NgModule({
  declarations: [
    AppComponent,
CustomPanelTestComponent
  ],
  imports: [
    BrowserModule,
    AppRoutingModule,
    HttpClientModule,
    FormsModule
  ],
  providers: [{provide: HTTP_INTERCEPTORS, useClass: ApiInterceptorService, multi: true}],
  bootstrap: [AppComponent],
})
export class AppModule { }
```

8. Using the below code, you will be able to access/use the events triggered from the application, inside the custom anchor panel. This will receive the details of the events posted from the application.

```
export class CustomPanelTestComponent implements OnInit {
  postedData: any;

  constructor(
    private customService: CustomPanelTestService,

  ) {
    window.addEventListener("message", (event) => {
      alert(event.data);
      this.Event=event.data._data;
    }, false);

  }
```

9. Now the MicroApp is ready.
10. Run **ng serve** and verify if the Micro App is running properly.
11. Run **ng build --base-href /custom/custom Panel TestApp/**. This will create a **dist** folder in the project.
12. Inside **dist** folder, there will be a folder with the same name as project name.
13. You can use this folder to deploy the Micro App in the server.

Deploy Micro Angular App on the Server

The following steps help you in deploying the Micro Angular App on the Server:

1. In the IIS, right-click the **Interaction Collector Web Client** and click **Explore**.
2. Create a new folder (custom). Copy the folder from the **dist** and paste it in the custom folder.
3. To verify if you are able to browse the Micro Angular App, right-click the folder in IIS and then click the **Browse**.
4. When you browse the Micro Angular App, URL can be obtained. Copy the URL.
5. In the Custom Panel Mapping page, paste the URL in the URL box. Then the anchor Panel with URL gets mapped to the Micro Angular App.
6. Verify the functionality of the Micro Angular App by checking if the Micro Angular App is able to access or use the events triggered from the application.

Micro Angular App Design Recommendations

The following recommendations help you design the Micro Angular App, while retaining the look and feel of new anchor panel with the existing anchor panel.

- **Height:** Should be less than or equal to 275px.
- **Width:** Should be less than or equal to 500px.
- **Font-Size:** Should be 13px
- **Font-family:** Tahoma, Geneva, Sans-serif
- **Font Color:** #333333
- **Background-Color:** #f 5f 5f 5
- **Border:** 1px solid #e3e3e3

Desks

Desks

You can search for, add, modify, copy, and delete desks. You can also set limits for desks. You assign users to desks and then assign accounts to desks. Users work the accounts assigned to their desk.

Related Topics

Search for a Desk

Add a Desk

Modify a Desk

Delete a Desk

Search for a Permission or System Code

Data Grids

Account Codes

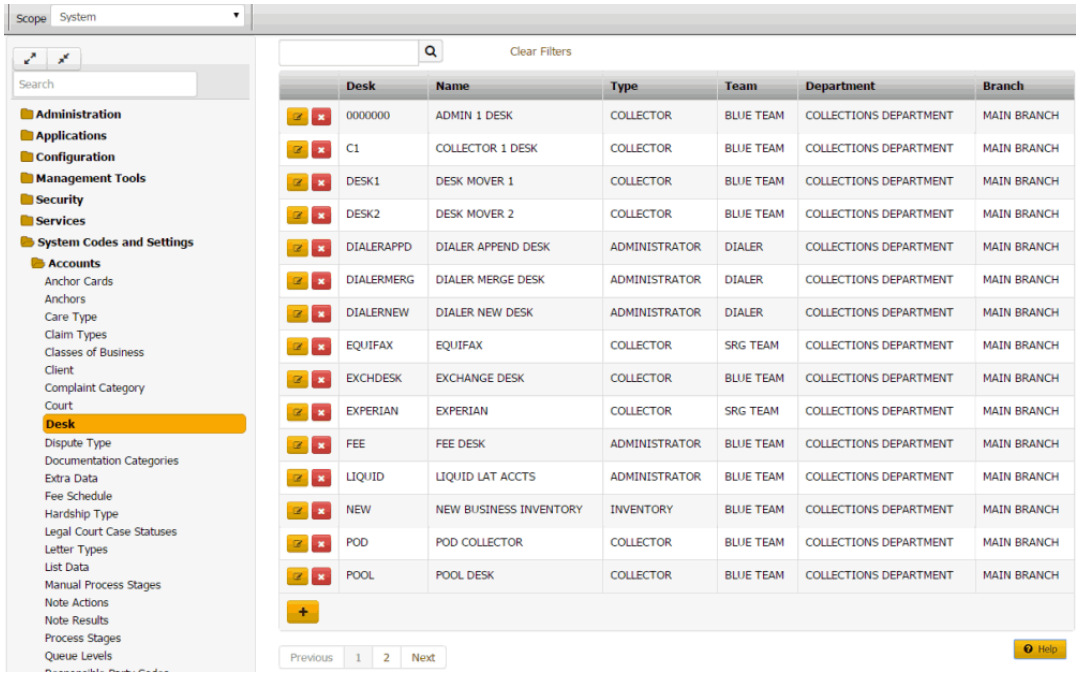
Feedback

Search for a Desk

Use the **Desk** panel to search for a desk.

To search for a desk

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Desk**.



2. In the **Search** box in the **Desk** panel, type one or more characters to search and then press **Enter** or click the Search icon. The system searches the desk code, desk name, desk type, team, department, and branch for a match. It displays only the desks that match your search criteria.

3. To clear the search criteria, click **Clear Filters**. The system displays all desks.

Related Topics

Search for a Permission or System Code

Data Grids

Desks

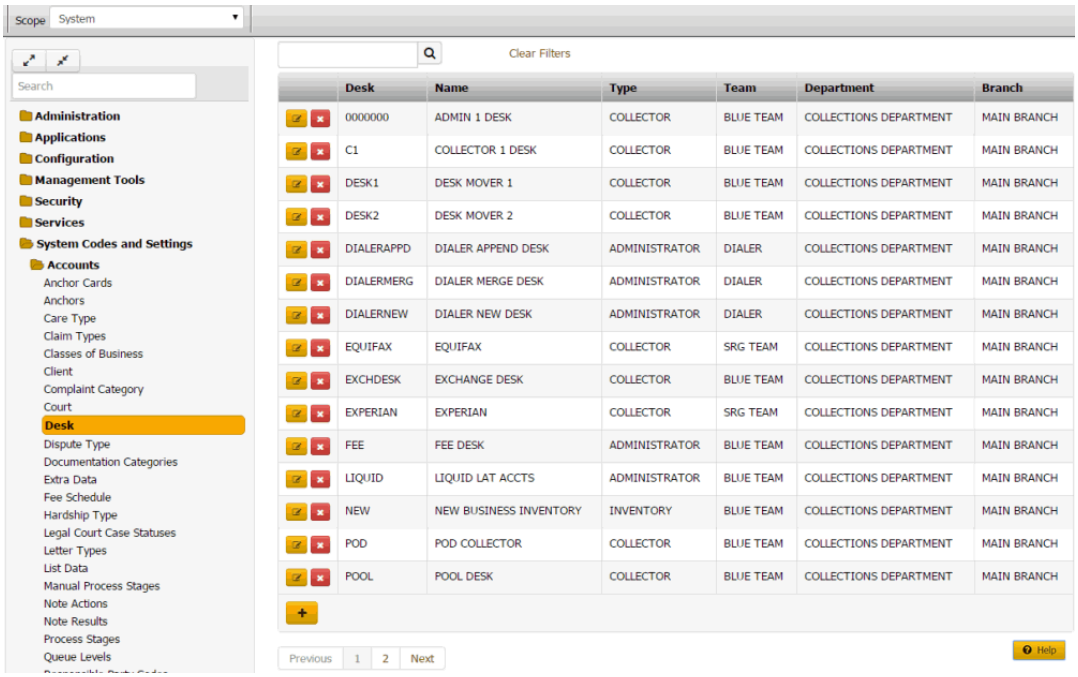
Feedback

Add a Desk

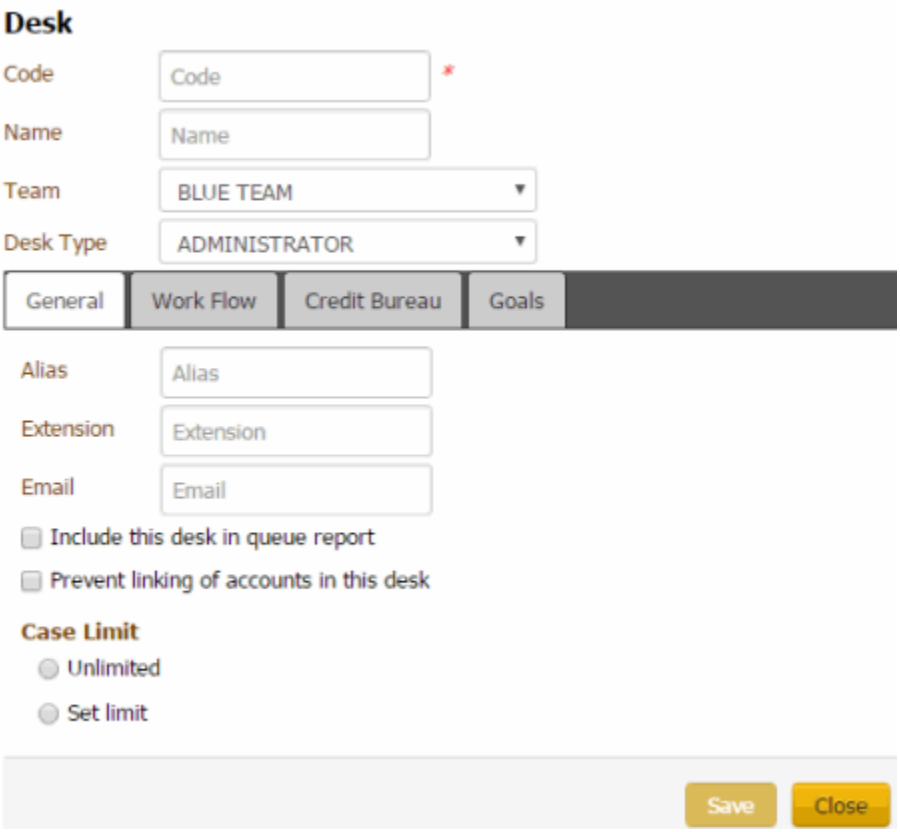
Use the **Desk** dialog box to add a desk code.

To add a desk code

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Desk**.



2. Click the plus sign (+). The **Desk** dialog box appears with the **General** tab selected.



Code: Unique code that identifies the desk.

Name: Name of the desk.

Team: Used to determine the department and branch assigned to the desk.

Desk Type: The type of desk assigned is for information purposes only, except for the inventory desk. Latitude uses Inventory desks to receive new business for your organization. Valid values are:

Administrator: Not used

Clerical: Not used

Supervisor: Not used

AIM: Used only for holding accounts forwarded to outside agencies using the Agency Interface Module (AIM) program.

Collector: Holds accounts for a particular user.

Inventory: Repository for new accounts, used when importing new business. You can distribute accounts in the inventory desk using the Desk Mover program.

Alias: Collector's name inserted in letters in place of the **Alias** merge field.

Extension: Collector's phone extension inserted in letters in place of the **Extension** merge field.

Email: Collector's email address inserted in letters in place of the **Email** merge field.

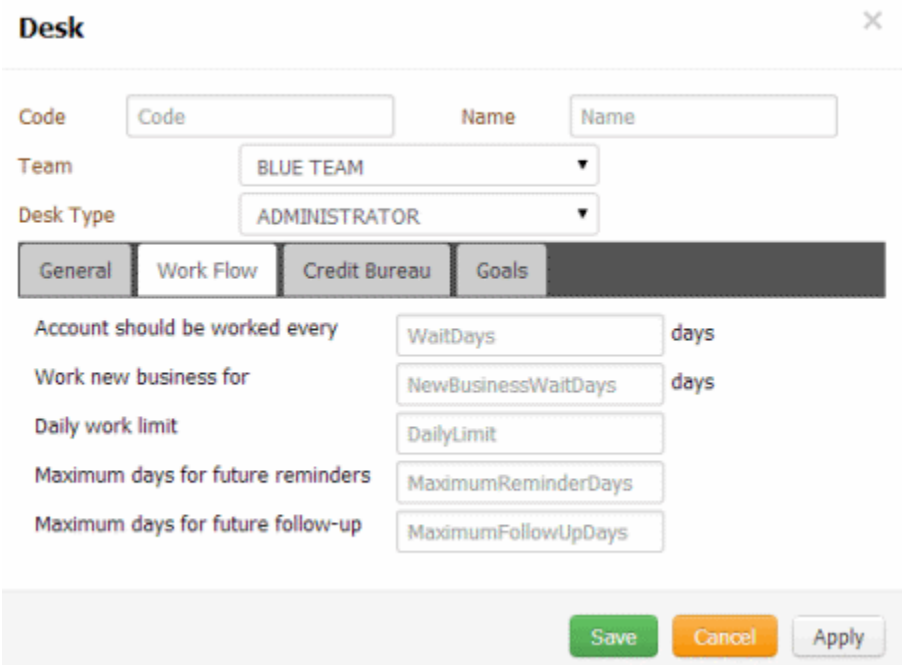
Include this desk in queue report: If selected, the Collector Queue and Monthly Collections reports include account information for this desk.

Prevent linking of accounts in this desk: If selected, you cannot link accounts in this desk to other accounts. This option only applies when linking accounts automatically using Link Console. Manual linking does not respect this rule.

Unlimited: If selected, the desk can have an unlimited number of accounts assigned to it.

Set Limit: If selected, type the maximum number of accounts that users can assign to a desk.

3. Complete the information and then click the **Work Flow** tab.



Accounts should be worked every __ days: Maximum number of days between working an account assigned to this desk that Latitude waits before setting an account follow-up for the next day.

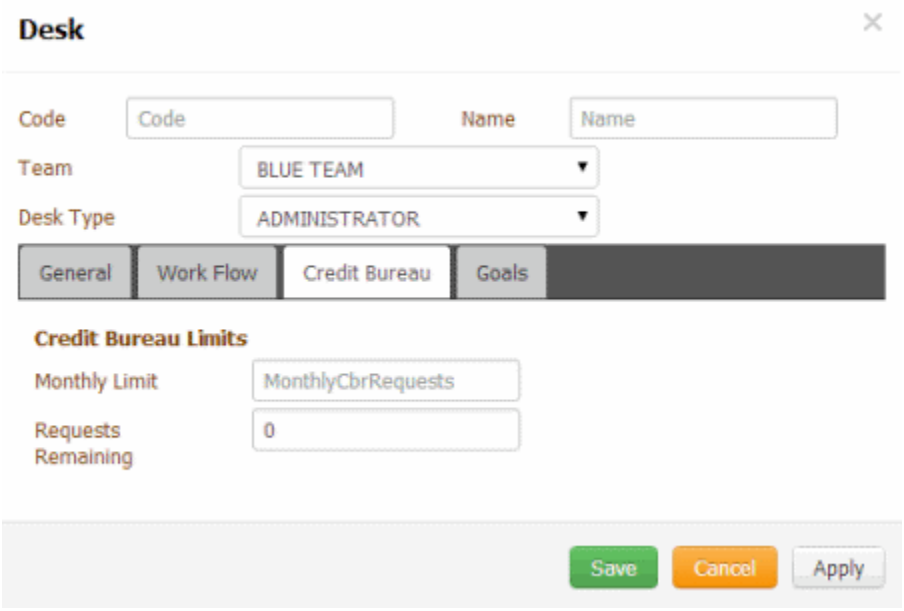
Work new business for __ days: Maximum number of days that the user can work an account assigned to this desk as queue level 016 (new business follow-up) before the account moves to another queue level.

Daily Work Limit: Maximum number of accounts that this desk can have set for follow-up work for any 24 hour period.

Maximum days for future reminders: Maximum number of days ahead a user can set a reminder for an account assigned to this desk.

Maximum days for future follow-up: Maximum number of days ahead a user can set a follow-up date for an account assigned to this desk.

4. Complete the information and then click the **Credit Bureau** tab.

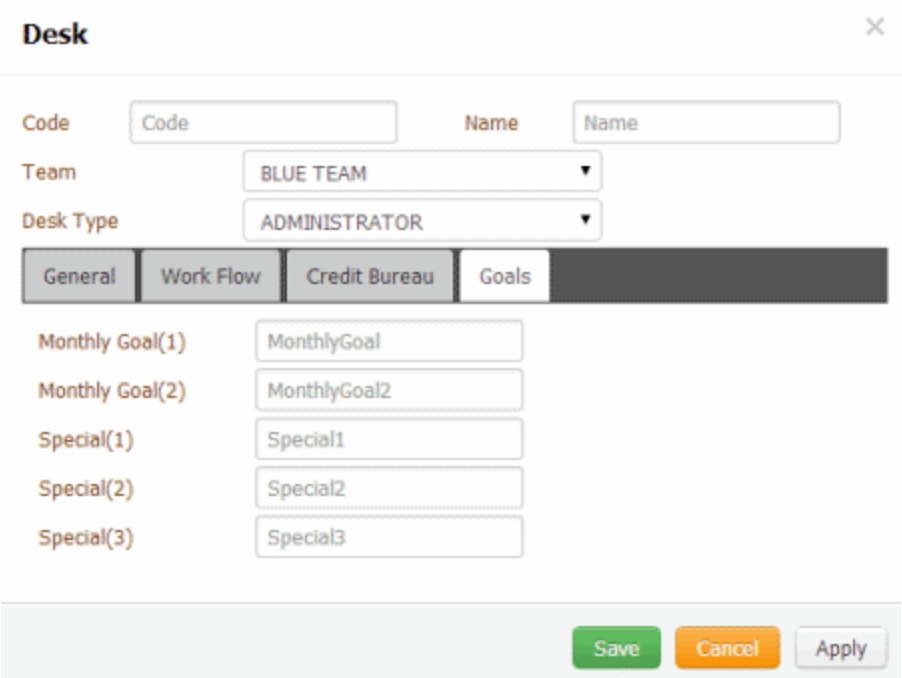


Monthly Limit: Maximum number of credit bureau reports the desk can request each month. You cannot set this number higher than 32,000.

Requests Remaining: If setting up a new desk, the number of requests allowed for the desk for the rest of the current month. For example, if the monthly limit is "50" and the desk has already requested "20" reports this month, type "30" in this box. Latitude starts tracking this number after you save the desk. You can reset Credit Bureau Reporting for all desks manually at any time. See Reset Credit Bureau Request Limits.

Min Balance: Minimum balance on an account that allows the desk to send a credit report request.

5. Complete the information and then click the **Goals** tab.



Monthly Goal (1): Number of credit bureau reports the desk strives to attain each month.

Monthly Goal (2): Number of credit bureau reports the desk strives to attain each alternative month.

Special (1): Number of special request goals for the desk.

Special (2): Number of special request goals for the desk.

Special (3): Number of special request goals for the desk.

6. Complete the information and then click **Save**.

Related Topics

Set an Account Follow-up Date

Set a Timed Reminder

Search for a Permission or System Code

Data Grids

Desks

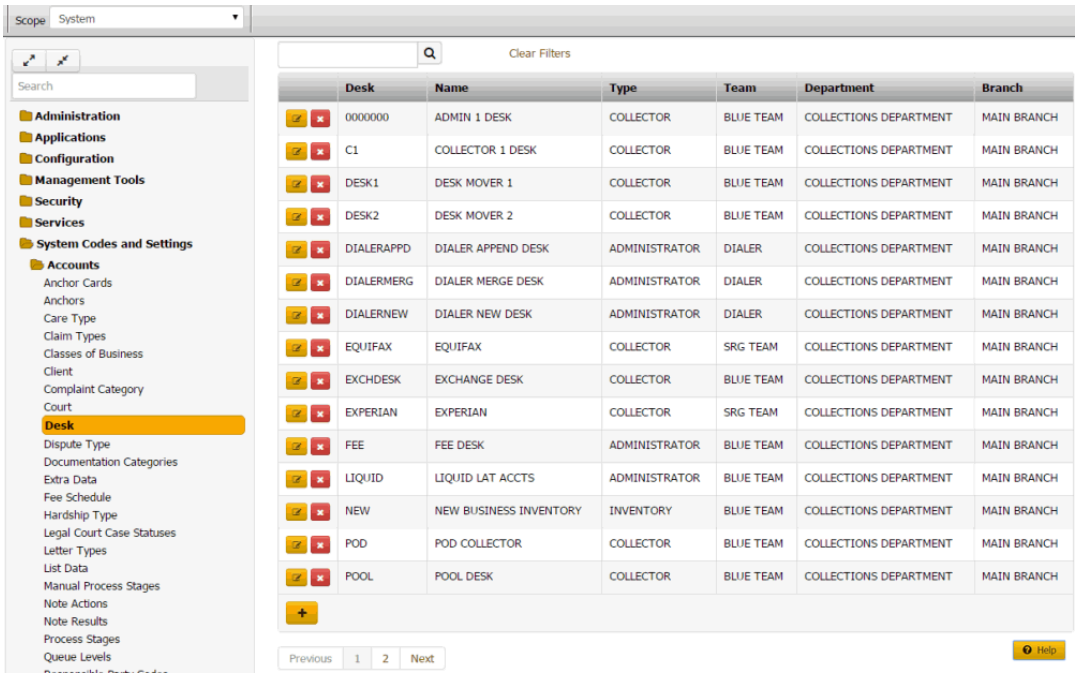
Feedback

Modify a Desk

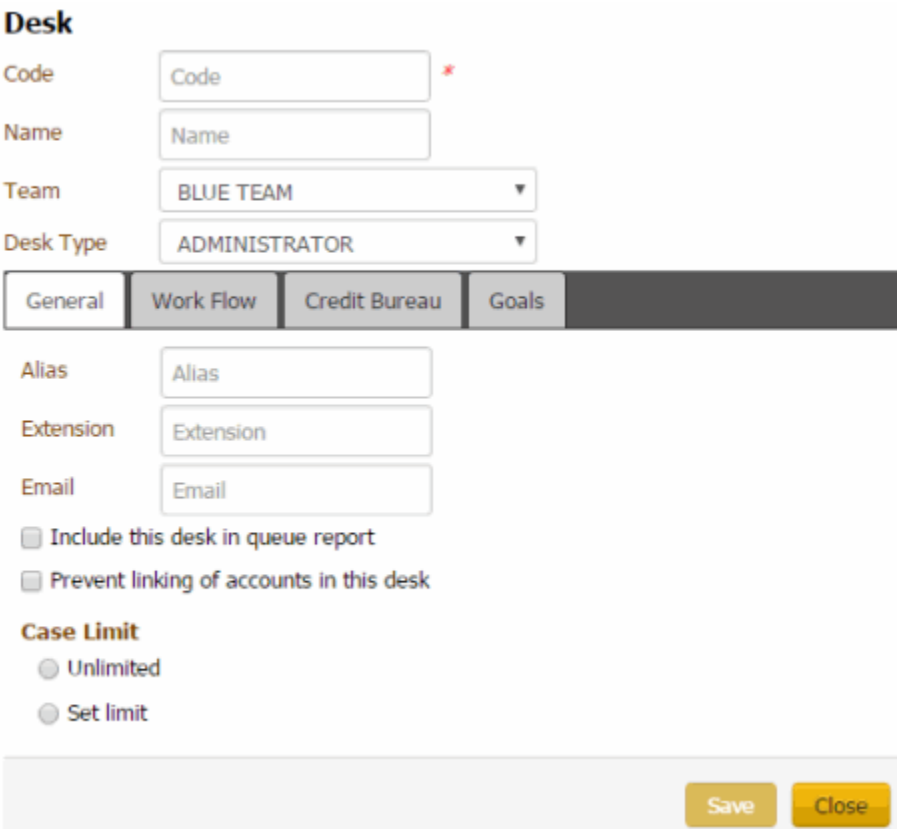
Use the **Desk** dialog box to modify a desk code.

To modify a desk code

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Desk**.



2. Click the Edit icon. The **Desk** dialog box appears with the **General** tab selected.



Code: Unique code that identifies the desk.

Name: Name of the desk.

Team: Used to determine the department and branch assigned to the desk.

Desk Type: The type of desk assigned is for information purposes only, except for the inventory desk. Latitude uses Inventory desks to receive new business for your organization. Valid values are:

Administrator: Not used

Clerical: Not used

Supervisor: Not used

AIM: Used only for holding accounts forwarded to outside agencies using the Agency Interface Module (AIM) program.

Collector: Holds accounts for a particular user.

Inventory: Repository for new accounts, used when importing new business. You can distribute accounts in the inventory desk using the Desk Mover program.

Alias: Collector's name inserted in letters in place of the **Alias** merge field.

Extension: Collector's phone extension inserted in letters in place of the **Extension** merge field.

Email: Collector's email address inserted in letters in place of the **Email** merge field.

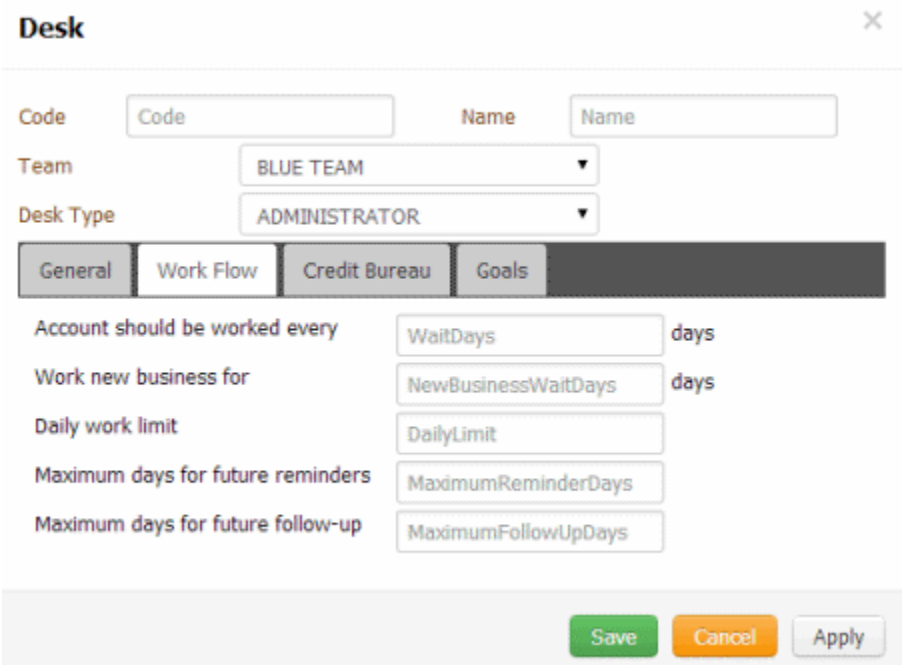
Include this desk in queue report: If selected, the Collector Queue and Monthly Collections reports include account information for this desk.

Prevent linking of accounts in this desk: If selected, you cannot link accounts in this desk to other accounts. This option only applies when linking accounts automatically using Link Console. Manual linking does not respect this rule.

Unlimited: If selected, the desk can have an unlimited number of accounts assigned to it.

Set Limit: If selected, type the maximum number of accounts that users can assign to a desk.

3. Modify the information and then click the **Work Flow** tab.



Accounts should be worked every __ days: Number of days an account is idle while assigned to the desk that Latitude waits before prompting the user to work it. Once this number of days passes, Latitude sets the follow-up date to the next day.

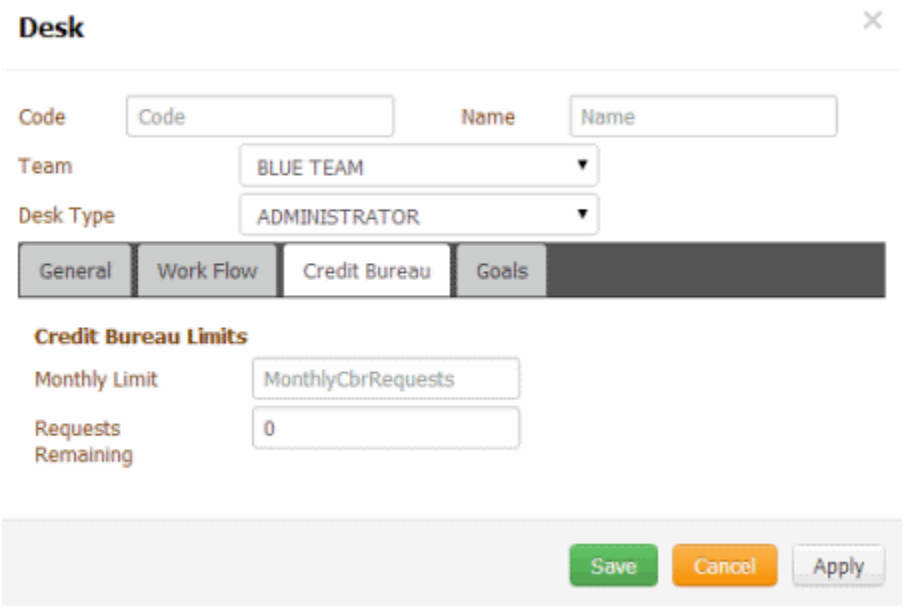
Work new business for __ days: Number of days that the user works new business while it's assigned to the desk. Once the user works the new business for the specified number of days, Latitude moves the account to the 0-30 day queue (020).

Daily Work Limit: Number of accounts that the desk can set for follow-up work for any 24 hour period.

Maximum days for future reminders: Maximum number of days ahead a user can set a reminder for an account assigned to this desk.

Maximum days for future follow-up: Maximum number of days ahead a user can set a follow-up date for an account assigned to this desk.

4. Modify the information as necessary and then click the **Credit Bureau** tab.

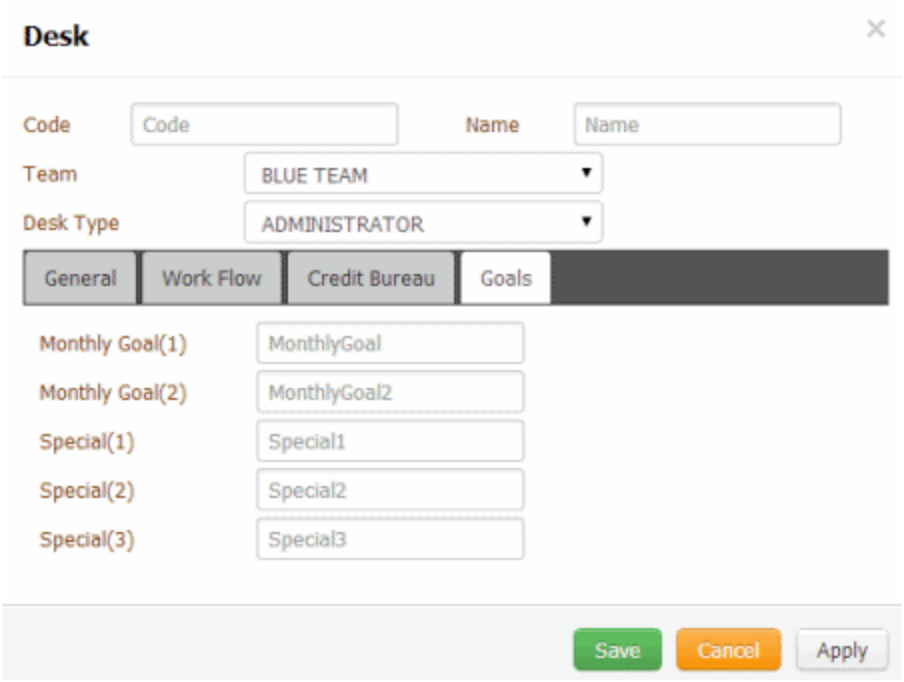


Monthly Limit: Maximum number of credit bureau reports the desk can request each month. You cannot set this number higher than 32,000.

Requests Remaining: If setting up a new desk, the number of requests allowed for the desk for the rest of the current month. For example, if the monthly limit is "50" and the desk has already requested "20" reports this month, type "30" in this box. Latitude starts tracking this number after you save the desk. You can reset Credit Bureau Reporting for all desks manually at any time. See Reset Credit Bureau Request Limits.

Min Balance: Minimum balance on an account that allows the desk to send a credit report request.

5. Modify the information as necessary and then click the **Goals** tab.



Monthly Goal (1): Number of credit bureau reports the desk strives to attain each month.

Monthly Goal (2): Number of credit bureau reports the desk strives to attain each alternative month.

Special (1): Number of special request goals for the desk.

Special (2): Number of special request goals for the desk.

Special (3): Number of special request goals for the desk.

6. Modify the information as necessary and then click **Save**.

Related Topics

Set an Account Follow-up Date

Set a Timed Reminder

Search for a Permission or System Code

Data Grids

Desks

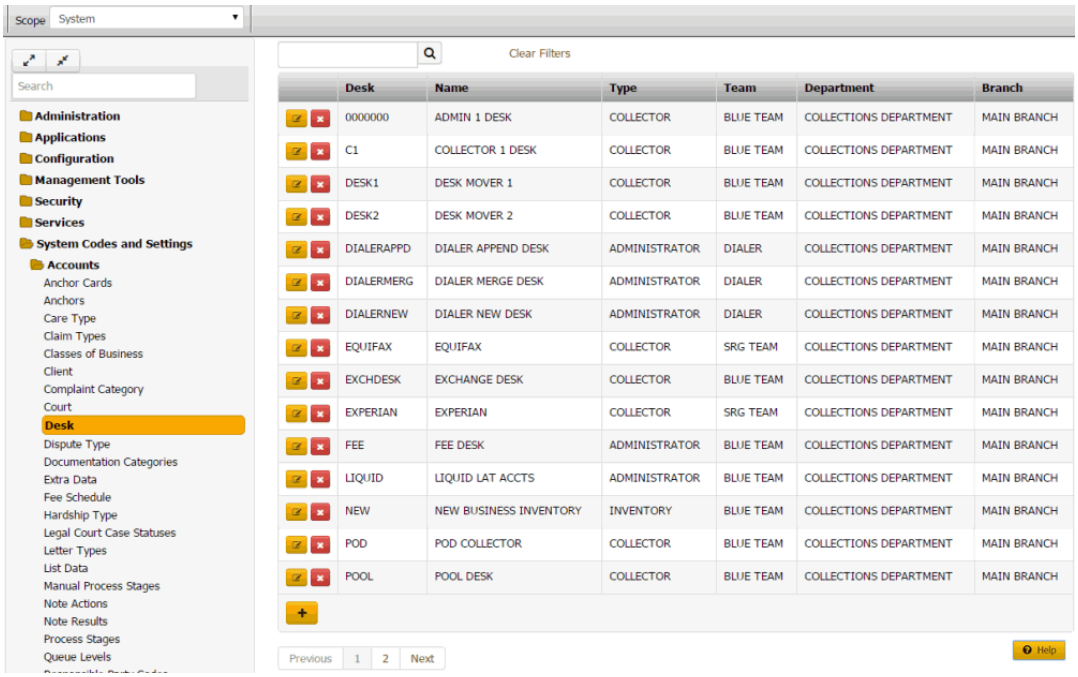
Feedback

Delete a Desk

Use the **Desk** panel to delete a desk code. Only Administrators can delete desk codes.

To delete a desk code

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Desk**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Search for a Permission or System Code

Data Grids

Desks

Dispute Types

Feedback

Dispute Types

You can add, modify, and delete debt dispute types, such as partial balance, full balance, and account ownership. Users specify a dispute type when adding disputes. For more information, see Add a Dispute.

Related Topics

Add a Dispute Type

Modify a Dispute Type

Delete a Dispute Type

Add a Dispute

Modify a Dispute

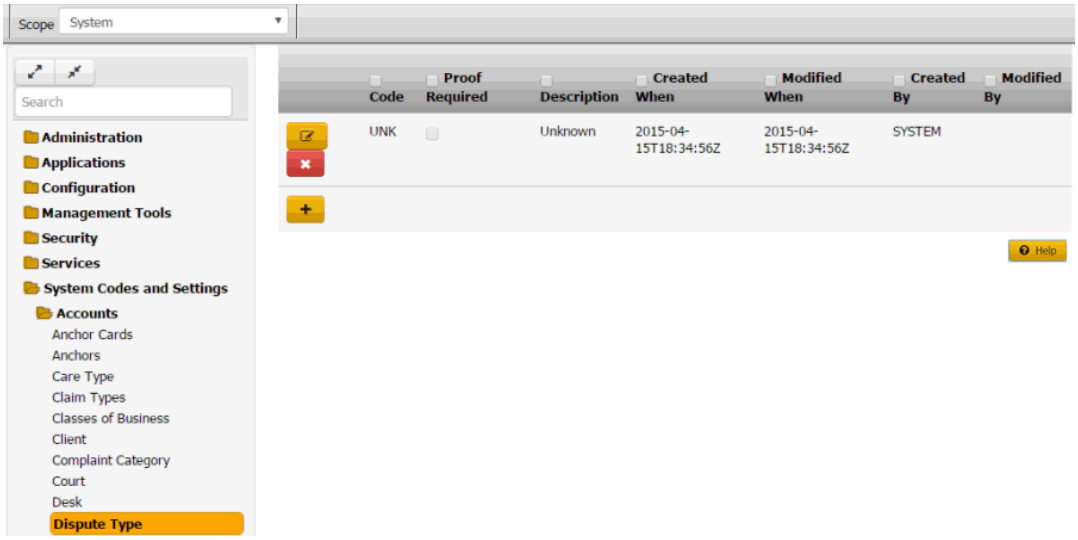
Feedback

Add a Dispute Type

Use the **Dispute Type** panel to add a dispute type.

To add a dispute type

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Dispute Type**.



Code: Code that identifies the dispute type.

Proof Required: If selected, your organization requires proof of the dispute.

Description: Description of the dispute type.

Created When: Date and time a user created this dispute type.

Modified When: Date and time a user last modified this dispute type.

Created By: User who created this dispute type.

Modified By: User who last modified this dispute type.

2. Click the plus sign (+). A blank row appears in the data grid.
3. Complete the information and then click the check mark.

Related Topics

Dispute Types

Account Codes

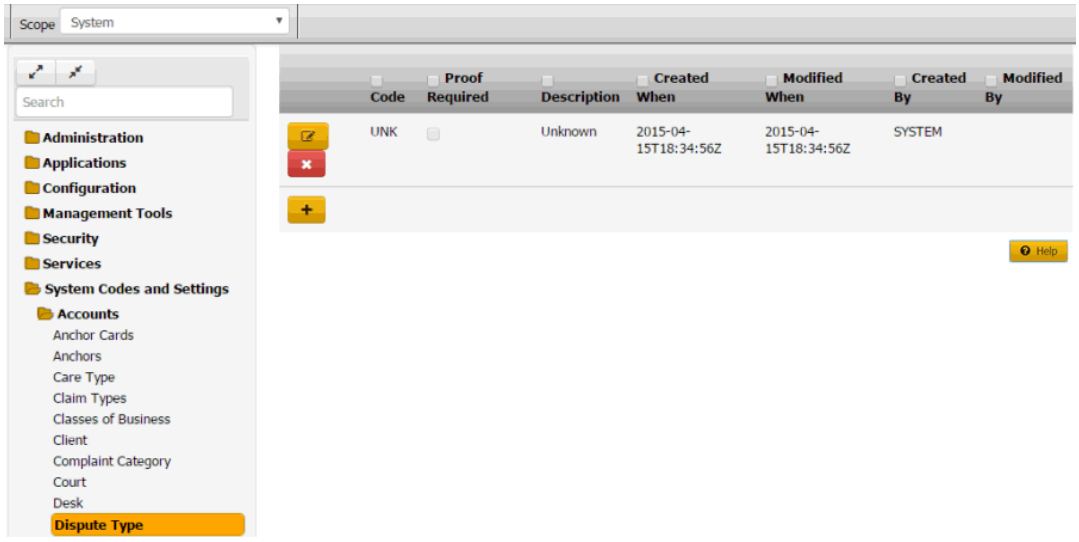
Feedback

Modify a Dispute Type

Use the **Dispute Type** panel to modify a dispute type.

To modify a dispute type

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Dispute Type**.



Code: Code that identifies the dispute type.

Proof Required: If selected, your organization requires proof of the dispute.

Description: Description of the dispute type.

Created When: Date and time a user created this dispute type.

Modified When: Date and time a user last modified this dispute type.

Created By: User who created this dispute type.

Modified By: User who last modified this dispute type.

2. Click the Edit icon. The dispute type appears in edit mode.
3. Modify the information and then click the check mark.

Related Topics

Dispute Types

Account Codes

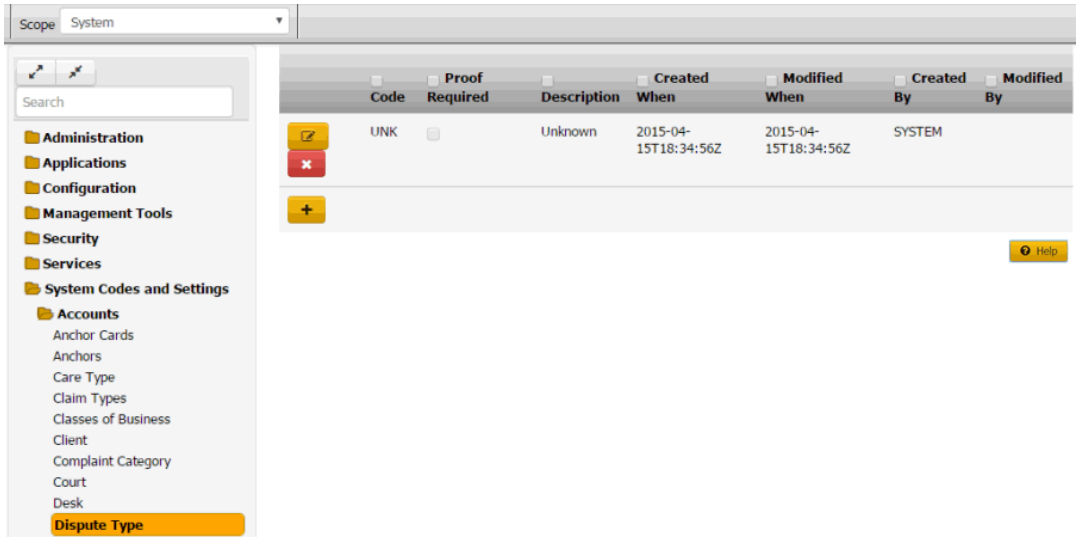
Feedback

Delete a Dispute Type

Use the **Dispute Type** panel to delete a dispute type.

To delete a dispute type

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Dispute Type**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Dispute Types

Account Codes

Documentation Categories

Feedback

Documentation Categories

You can search for, add, modify, and delete documentation categories. Users specify a documentation category when attaching a document to an account. For more information, see Attach a Document to an Account.

Related Topics

Add a Documentation Category

Modify a Documentation Category

Delete a Documentation Category

Search for a Permission or System Code

Data Grids

Account Codes

Attach a Document to an Account

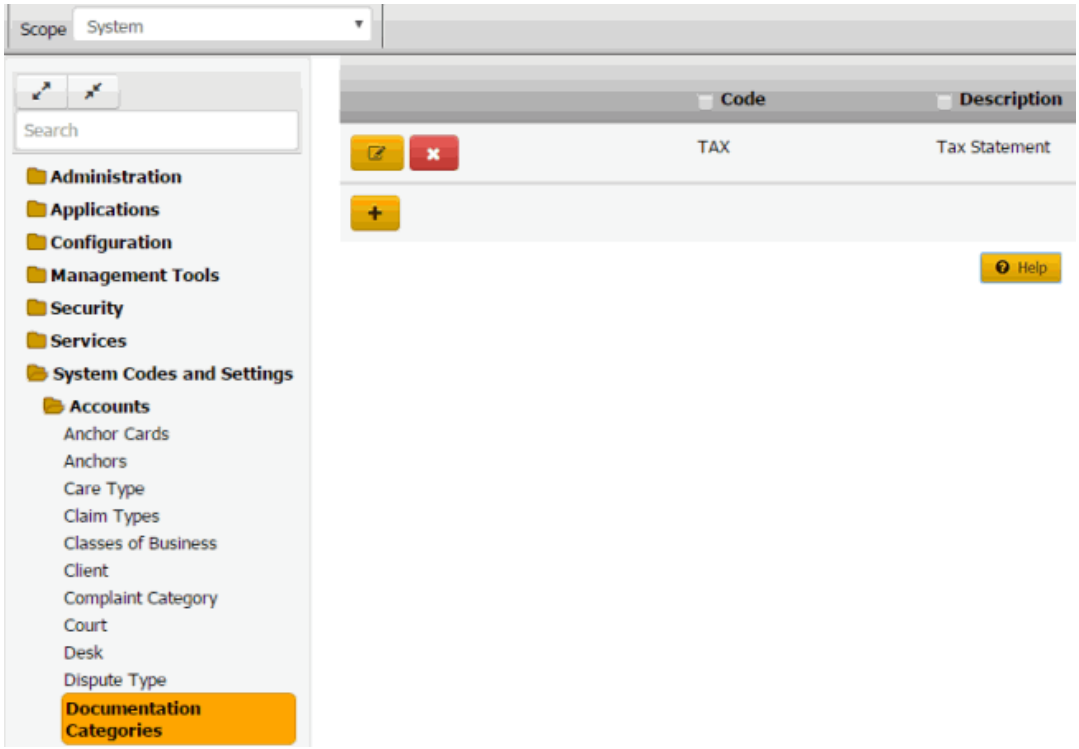
Feedback

Add a Documentation Category

Use the **Documentation Categories** panel to add a documentation category.

To add a documentation category

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Documentation Categories**.



2. Click the plus sign (+). A blank row appears in the data grid.

3. In the **Code** box, type a unique code for the documentation category.
4. In the **Description** box, type a description of the documentation category.
5. Click the check mark.

Related Topics

Search for a Permission or System Code

Data Grids

Documentation Categories

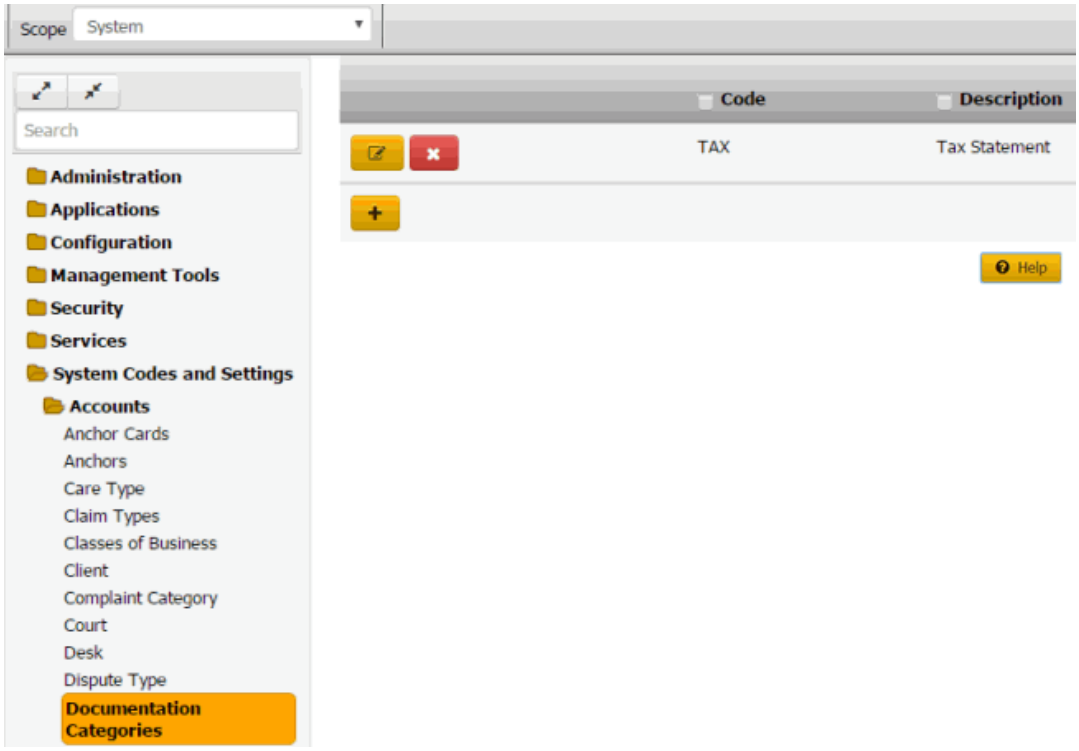
Feedback

Modify a Documentation Category

Use the **Documentation Categories** panel to modify a documentation category.

To modify a documentation category

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Documentation Categories**.



2. Click the Edit icon. The documentation category appears in edit mode.

3. Modify the information and then click the check mark.

Related Topics

Search for a Permission or System Code

Data Grids

Documentation Categories

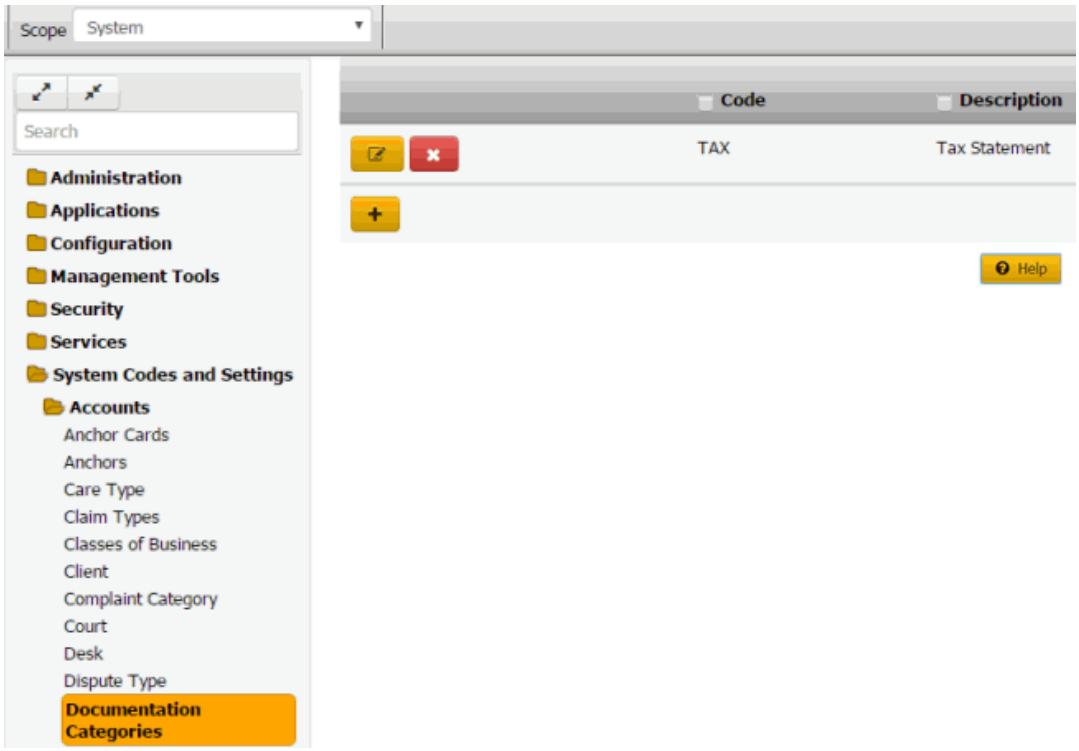
Feedback

Delete a Documentation Category

Use the **Documentation Categories** panel to delete a documentation category.

To delete a documentation category

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Documentation Categories**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Search for a Permission or System Code

Data Grids

Documentation Categories

Extra Data Codes

Extra Data Codes

You can search for, add, modify, and delete extra data codes. Extra data codes allow your organization to create categories to assign to custom data that users create. Users specify an extra data code when adding extra data. For more information, see Extra Data.

Related Topics

Add an Extra Data Code

Modify an Extra Data Code

Delete an Extra Data Code

Search for a Permission or System Code

Data Grids

Account Codes

Extra Data

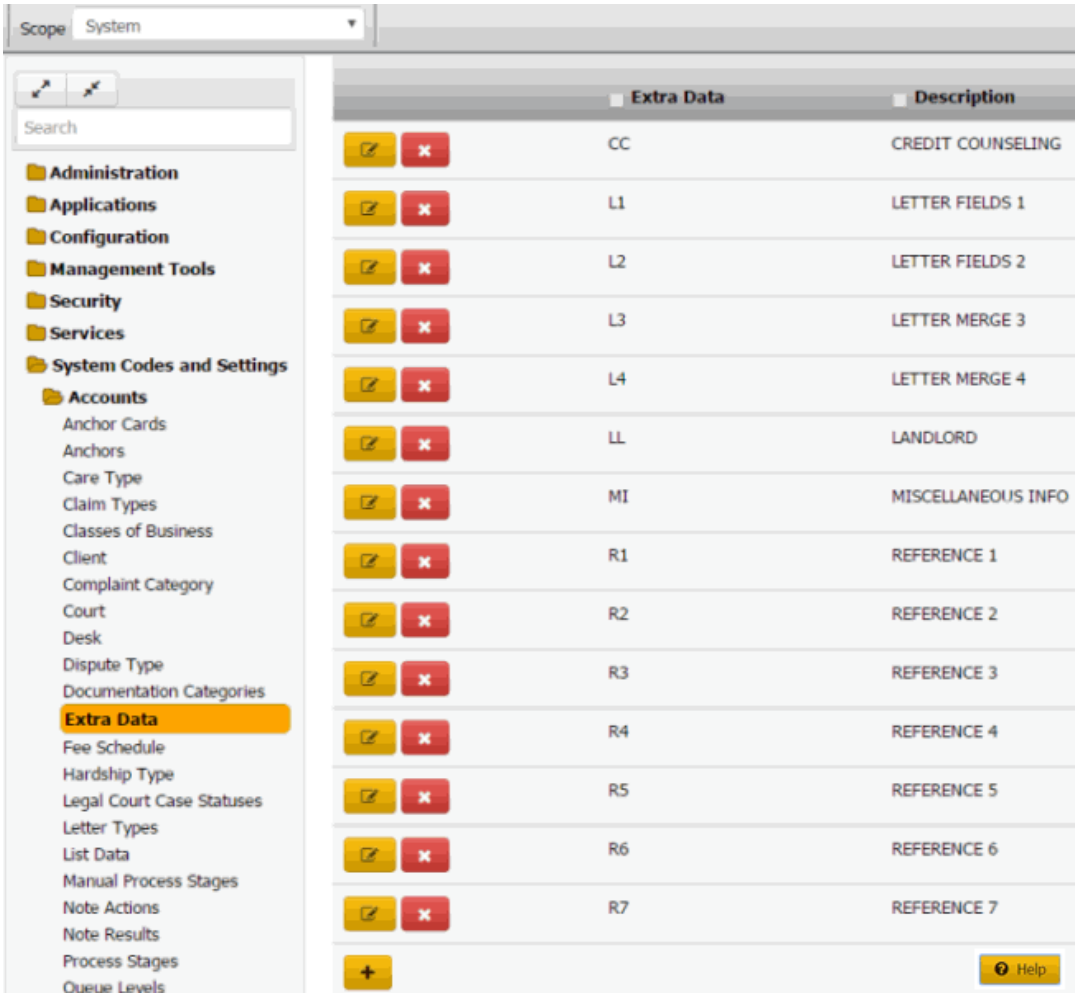
Feedback

Add an Extra Data Code

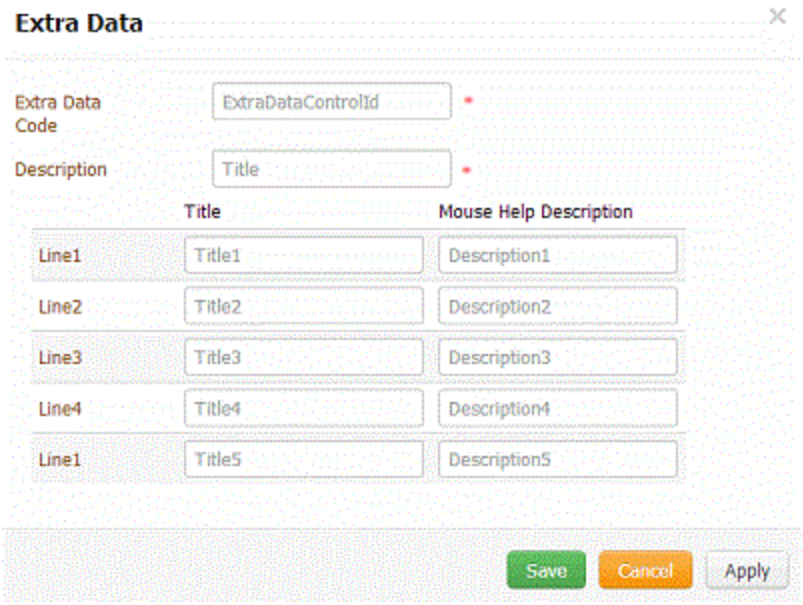
Use the **Extra Data** dialog box to add an extra data code.

To add an extra data code

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Extra Data**.



2. Click the plus sign (+). The **Extra Data** dialog box appears.



Extra Data Code: Unique two-character code that identifies the extra data.

Description: Description that appears next to the extra data code when a user is adding extra data to an account.

Title: Title for the information.

Mouse Help Description: Text to display when a user rests the mouse on the title.

Note: You can assign up to five lines of information to the code.

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

Related Topics

Search for a Permission or System Code

Data Grids

Extra Data Codes

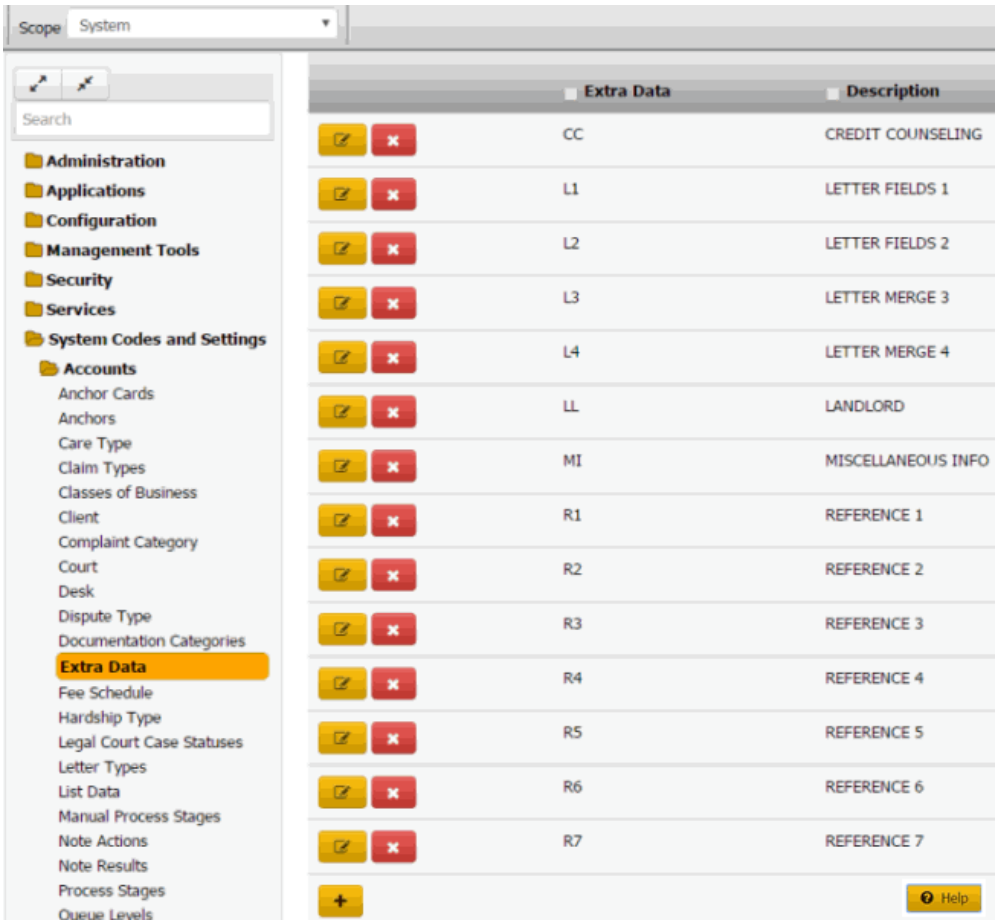
Feedback

Modify an Extra Data Code

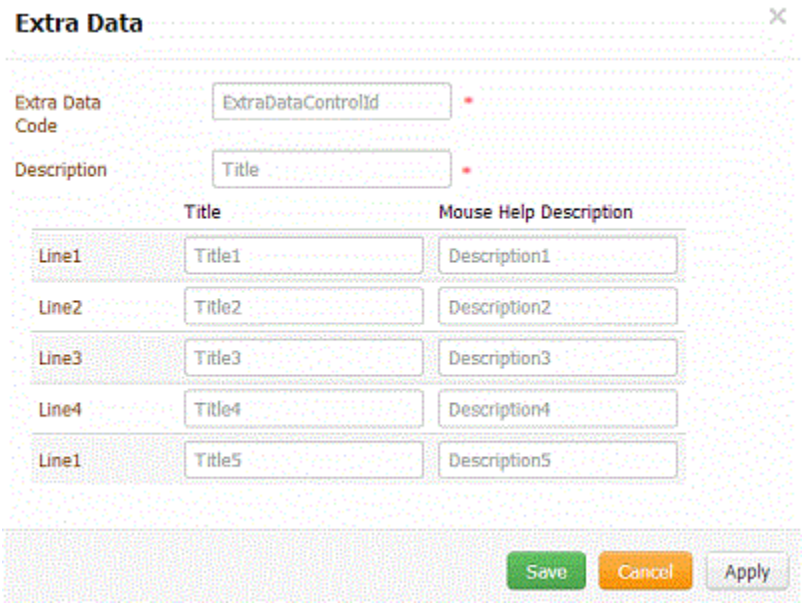
Use the **Extra Data** dialog box to modify an extra data code.

To modify an extra data code

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Extra Data**.



2. Click the plus sign (+). The **Extra Data** dialog box appears.



Extra Data Code: Unique two-character code that identifies the extra data.

Description: Description that appears next to the extra data code when a user is adding extra data to an account.

Title: Title for the information.

Mouse Help Description: Text to display when a user rests the mouse on the title.

Note: You can assign up to five lines of information to the code.

3. Modify the information and then click **Save**.

Related Topics

Search for a Permission or System Code

Data Grids

Extra Data Codes

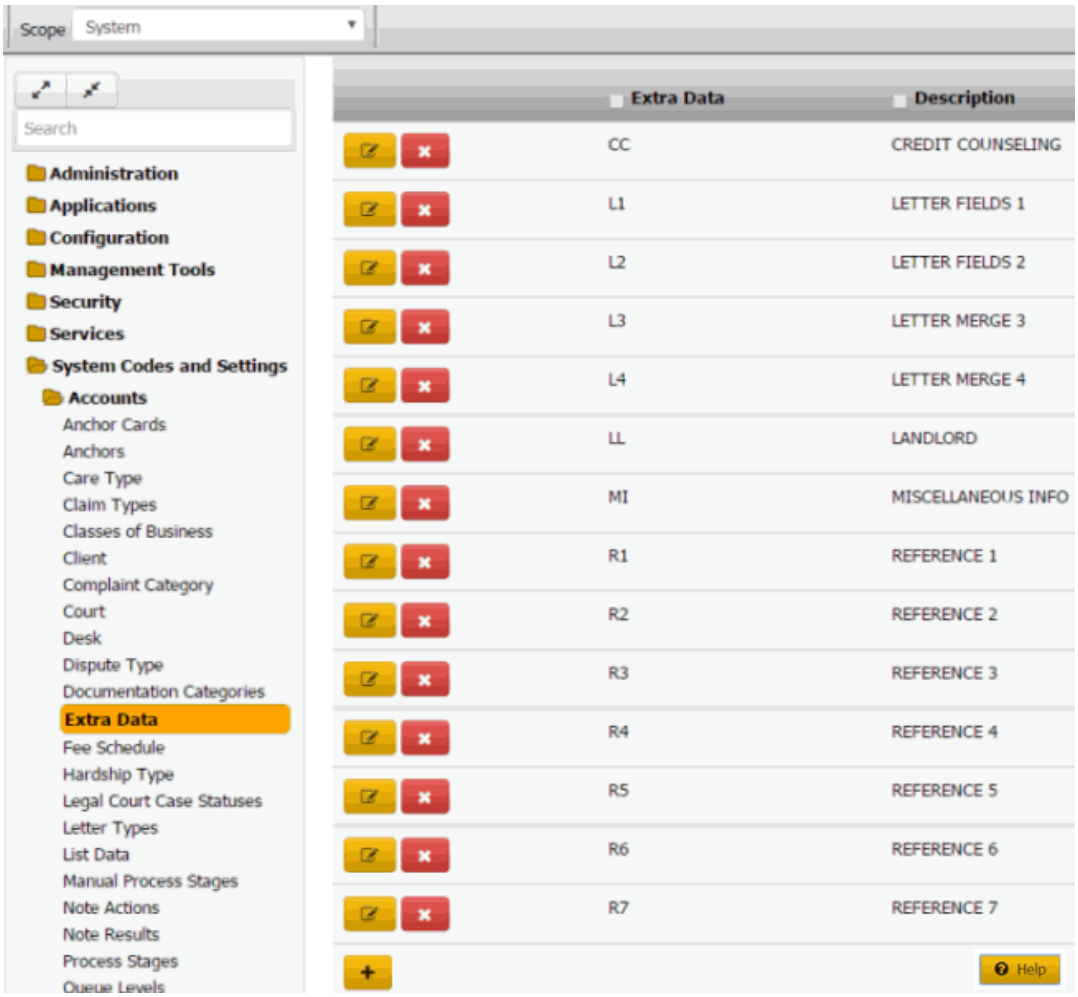
Feedback

Delete an Extra Data Code

Use the **Extra Data** panel to delete an extra data code.

To delete an extra data code

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Extra Data**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Search for a Permission or System Code

Data Grids

Extra Data Codes

Fee Schedules

Feedback

Fee Schedules

You can search for, add, modify, and delete fee schedules, which allow you to establish fee rates for your organization. You assign the fee schedules to clients. For more information, see Client Fee Schedule.

There are two types of fee schedules: Age-based and Balance-based.

Age-based fee schedule

Accounts set up with age-based fee schedules accumulate collection fees based on an account date range. Latitude increases or decreases at specific aging intervals the percentages charged for collections on accounts. For example, Latitude calculates a certain percentage of the amounts collected for the first 30 days that the organization holds the account, and calculates another percentage for the 30-60 day time period.

Balance-based fee schedule

Accounts set up with balance-based fee schedules accumulate collection fees based on account balances. For example, Latitude calculates a certain percentage for accounts with a balance of $1,000, and calculates another percentage for accounts with balances over $1,000 but not over $1,500.

Related Topics

Search for a Fee Schedule

Add a Fee Schedule

Modify an Age-Based Fee Schedule

Modify a Balance-Based Fee Schedule

Delete a Fee Schedule

Search for a Permission or System Code

Data Grids

Financial Codes

Client Fee Schedule

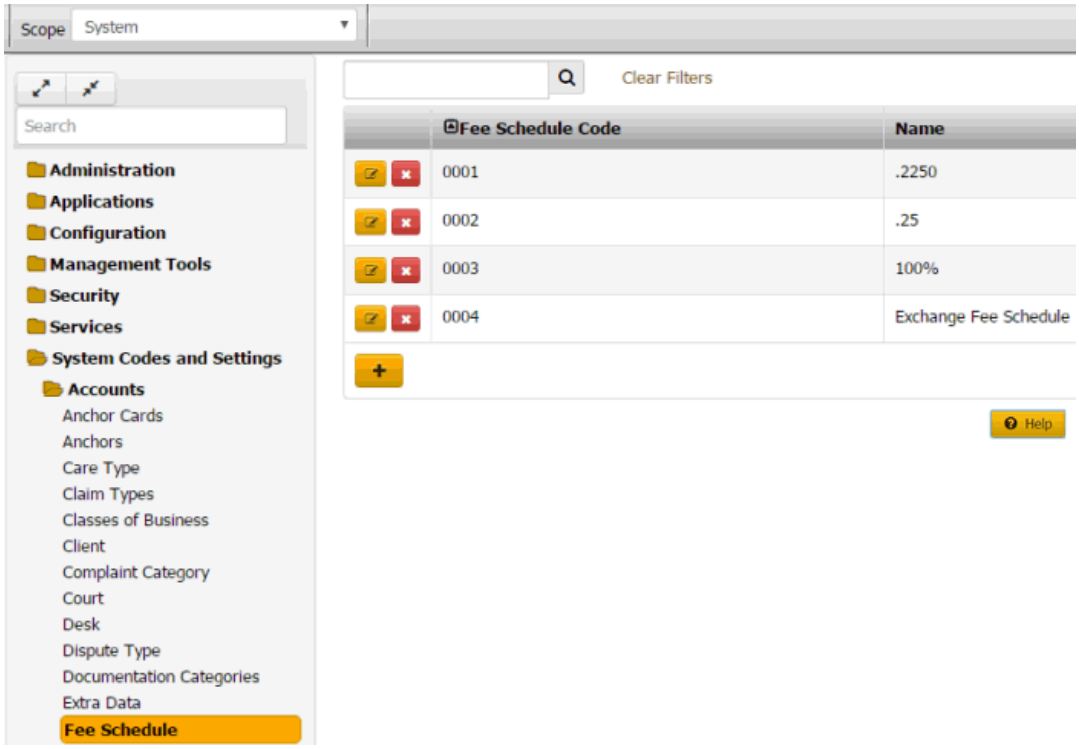
Feedback

Search for a Fee Schedule

Use the **Fee Schedule** panel to search for a fee schedule.

To search for a fee schedule

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Fee Schedule**.



2. In the **Search** box in the **Fee Schedule** panel, type one or more characters to search and then press **Enter** or click the Search icon. The system searches the fee schedule code and name for a match. It displays only the fee schedules that match your search criteria.

3. To clear the search criteria, click **Clear Filters**. The system displays all fee schedules.

Related Topics

Search for a Permission or System Code

Data Grids

Fee Schedules

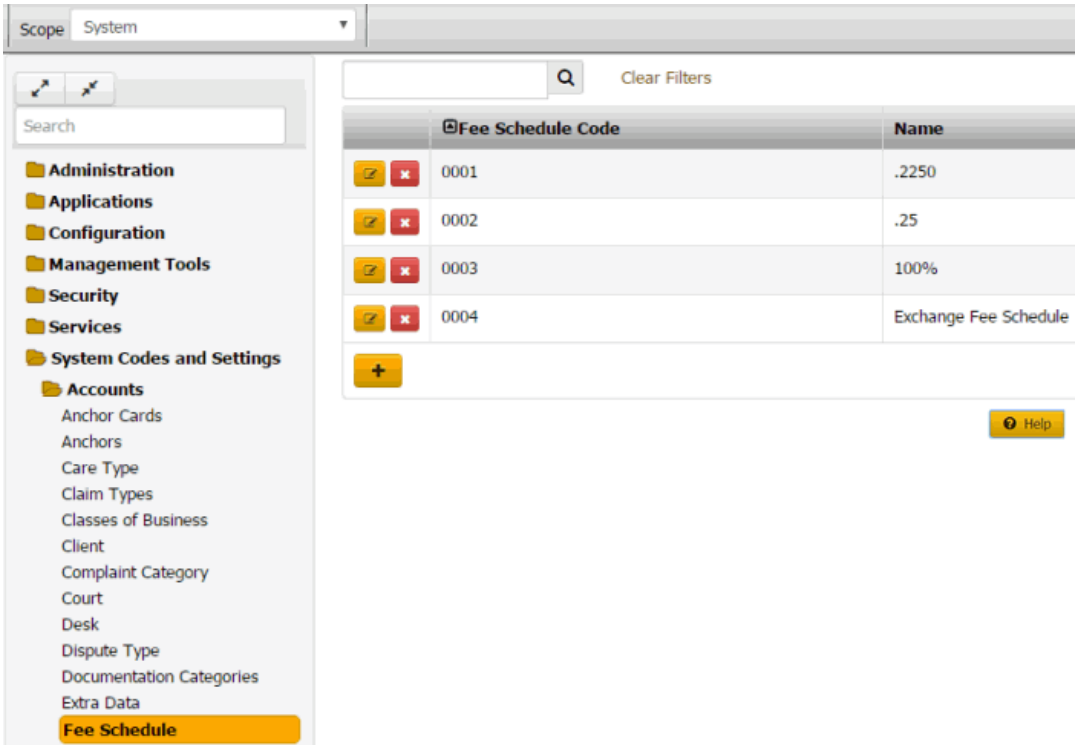
Feedback

Add a Fee Schedule

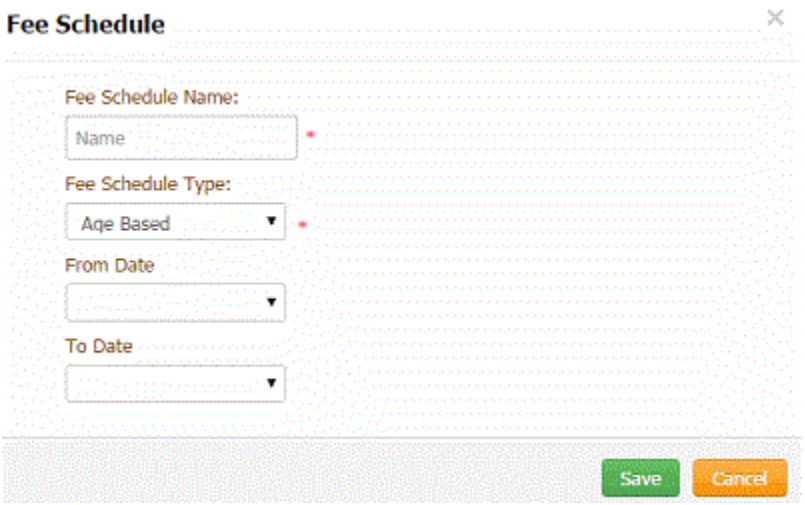
Use the **Fee Schedule** dialog box to add a fee schedule.

To add a fee schedule

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Fee Schedule**.



2. Click the plus sign (+). The **Fee Schedule** dialog box appears.



Fee Schedule Code: Unique number that identifies the fee schedule. Latitude assigns this number.

Fee Schedule Name: Description of the fee schedule.

Fee Schedule Type: Method for calculating fees.

From Date (available for age-based fee schedules only)

Received Date: Calculate fees starting on the account placement date.

Client DLP: Calculate fees starting on the date of the last payment to the client.

Client DLC: Calculate fees starting on the date of the last charge to the account.

Our DLP: Calculate fees starting on the date of the last payment to your organization.

[Blank]: Calculate fees starting from a user-defined date. These options represent the user-defined dates from your organization's control file.

To Date (available for age-based fee schedules only)

Entered Date: Calculate fees up to the payment entry date.

Received Date: Calculate fees up to the account placement date.

Client DLP: Calculate fees up to the date of the last payment to the client.

Client DLC: Calculate fees up to the date of the last charge to the account.

Our DLP: Calculate fees up to the date of the last payment to your organization.

[Blank]: Calculate fees up to the user-defined date. These options represent the user-defined dates from your organization's control file.

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

Related Topics

Search for a Permission or System Code

Data Grids

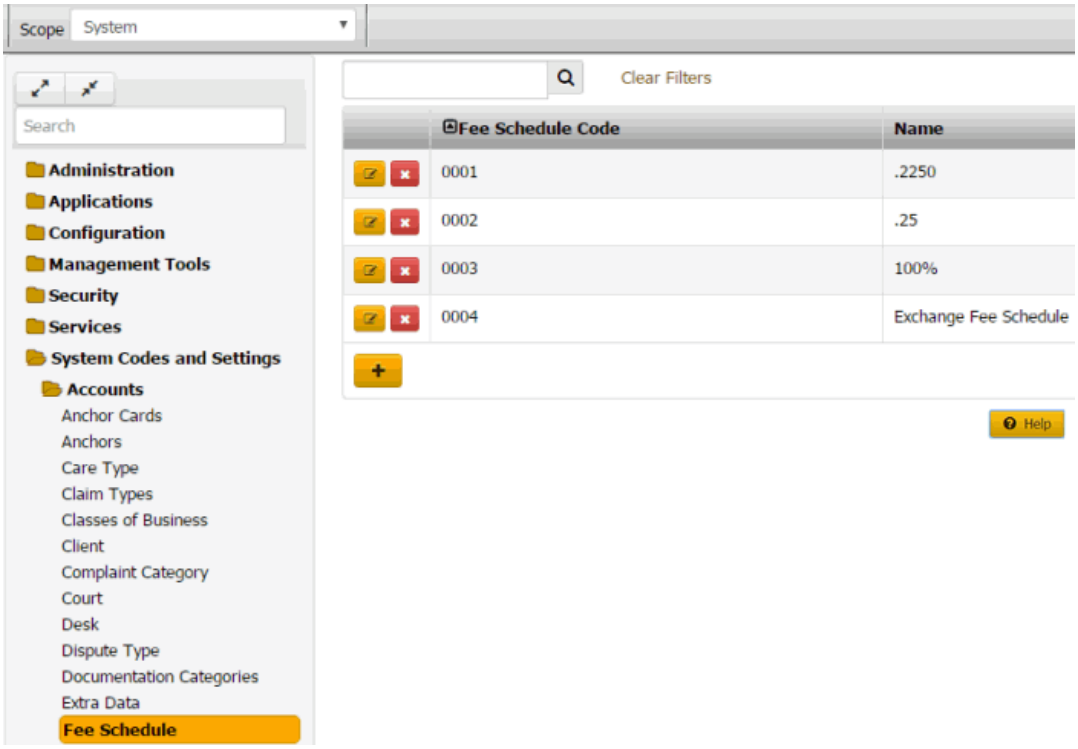
Fee Schedules

Modify an Age-Based Fee Schedule

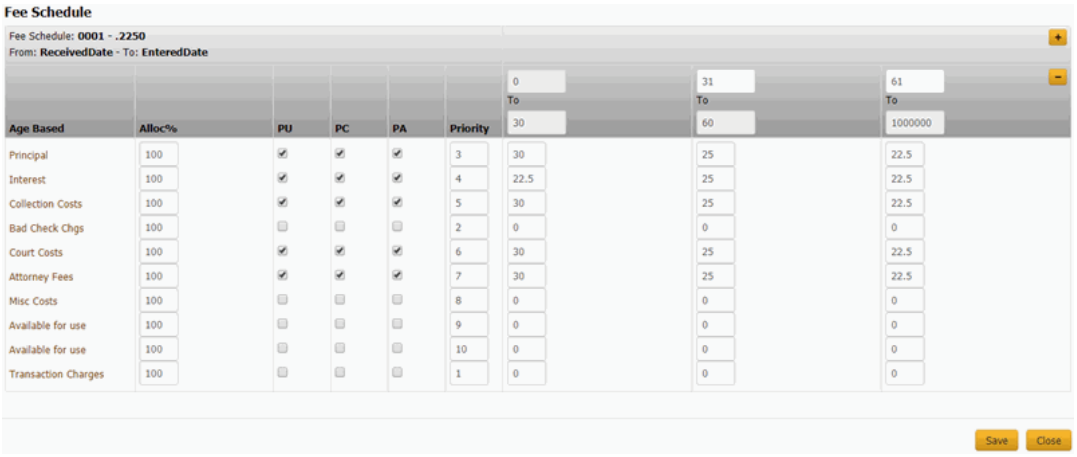
Use the **Fee Schedule** dialog box to modify an age-based fee schedule.

To modify an age-based fee schedule

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Fee Schedule**.



2. Click the Edit icon. The **Fee Schedule** dialog box appears.



Fee Schedule: Number and name that identifies the fee schedule.

From Date

Received Date: Calculate fees starting on the account placement date.

Client DLP: Calculate fees starting on the date of the last payment to the client.

Client DLC: Calculate fees starting on the date of the last charge to the account.

Our DLP: Calculate fees starting on the date of the last payment to your organization.

[Blank]: Calculate fees starting from a user-defined date. These options represent the user-defined dates from your organization's control file.

To Date

Entered Date: Calculate fees up to the payment entry date.

Received Date: Calculate fees up to the account placement date.

Client DLP: Calculate fees up to the date of the last payment to the client.

Client DLC: Calculate fees up to the date of the last charge to the account.

Our DLP: Calculate fees up to the date of the last payment to your organization.

[Blank]: Calculate fees up to the user-defined date. These options represent the user-defined dates from your organization's control file.

[Money Buckets]: Repositories for amounts you want to record in Latitude.

Alloc %: (Allocation percent) Percentage of the payment amount to allocate to the money bucket. The amount available to allocate toward a money bucket is the remaining payment amount to allocate times the money bucket's allocation rate. When Latitude allocates all the money buckets and an amount to pay remains, Latitude allocates the remaining amount based on priority. If the balance in a money bucket is less than the allocation amount, the remaining allocation amount becomes available to allocate to other money buckets with a lower priority.

PU: (Paid Us) If selected, client invoices include the amounts shown or paid into the money bucket for this payment type.

PC: (Paid Client) If selected, client invoices include the amounts shown or paid into the money bucket for this payment type.

PA: (Paid Agency) If selected, client invoices include the amounts shown or paid into the money bucket for this payment type.

Priority: Order in which to apply payments to the corresponding money bucket. Latitude applies payments to the money bucket with a priority of "1" first. If there are funds remaining, the system applies the payment to the bucket set as priority 2. The system continues applying the payment until no funds remain or the account balance is zero. If the account has a balance after applying the full payment amount received, the system applies the next payment you receive to the highest priority bucket that has a balance remaining. Generally, you order the priority from 1 to 10, from top to bottom.

To: Account balance range in which to apply fees. The first **To** column is always active, and indicates the first (or only) account balance range to use for the specified fee. For example, if you set the fee code to apply for balances from $0 to $999.99, this fee is the only one applied to the account. You may want to accept the default, which is $0 to $100000000 (so as not to activate any other fee schedule columns).

[Percent]: Percentage to set as the fee for each money bucket for the specified account balance range. For example, if you type an amount of "25," all payments applied toward the Principal bucket generate a fee of 25 percent of the money collected.

3. In the **Alloc %** column, specify the percentage of the payment amount to allocate to each money bucket.
4. In the **PU**, **PC**, and **PA** column, select or clear the check boxes to indicate whether to include these payment types on client invoices.

Note: If you don't select at least one of these check boxes, the system displays a warning message. To continue without selecting a check box, click **OK**.

5. In the **Priority** column, specify the order in which to apply payments.
6. In the **To** column, do the following:

a. Specify the beginning and ending account balance range in which to apply fees.

b. Specify the percent to calculate as the fee for each money bucket.

7. To set up subsequent account balance ranges, do the following:

a. Click the plus sign (**+**). The system inserts a column.

b. Type the next account balance range to use for applying fees.

c. Specify the percent to calculate as the fee for each money bucket.

Tip: To delete a "To" column, click the minus sign (-).

8. Click **Save**.

Related Topics

Search for a Permission or System Code

Data Grids

Fee Schedules

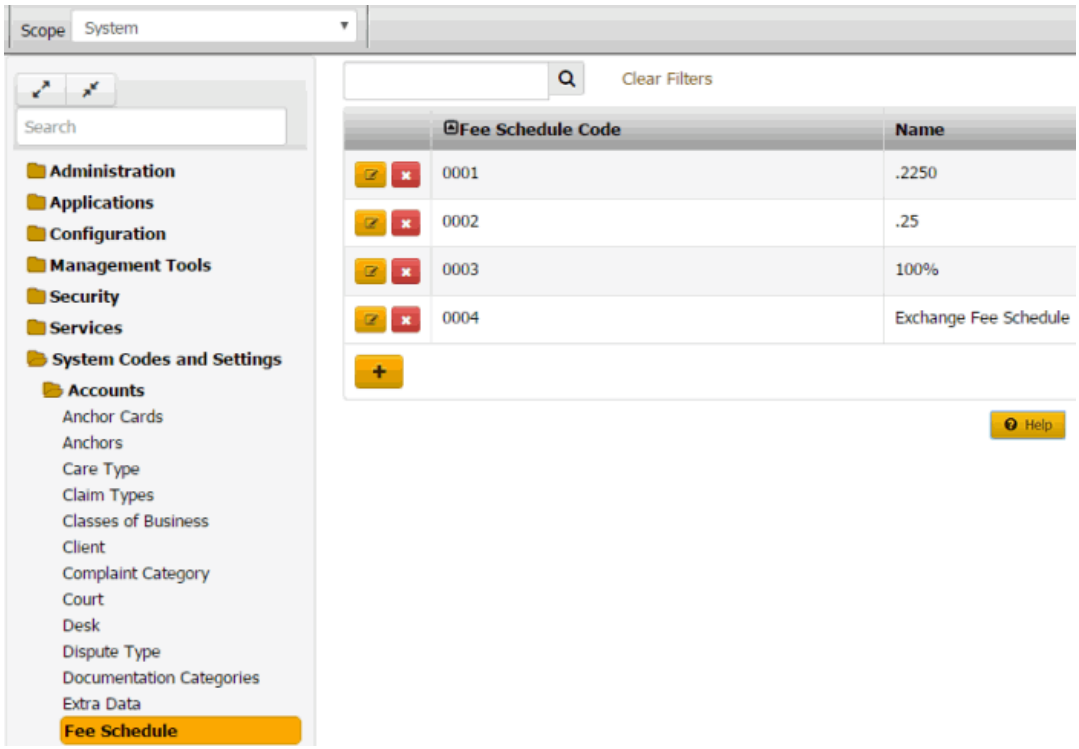
Feedback

Modify a Balance-Based Fee Schedule

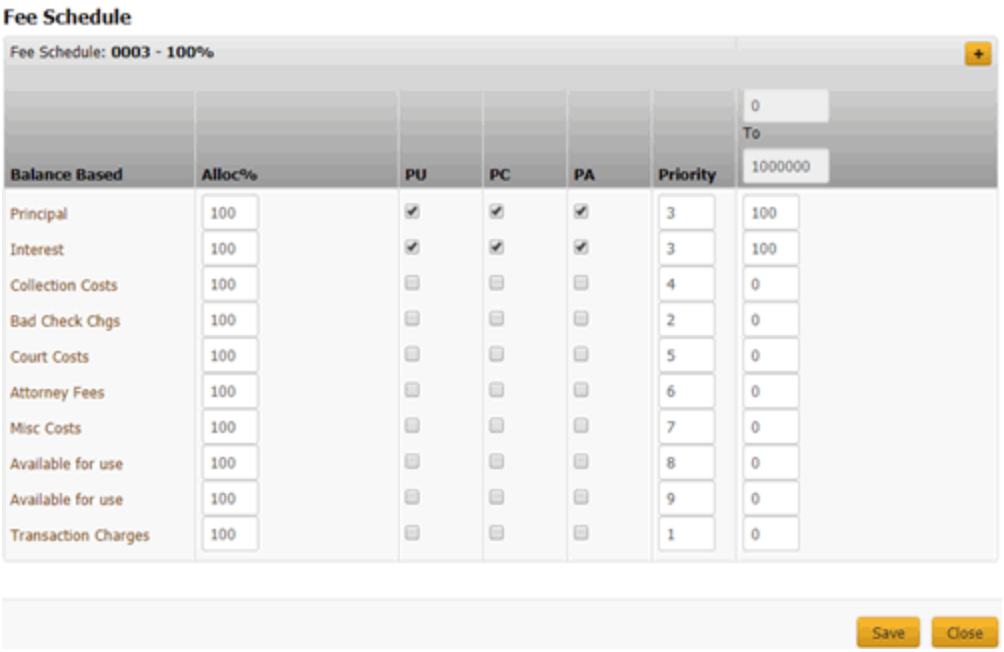
Use the **Fee Schedule** dialog box to modify a balance-based fee schedule.

To modify a balance-based fee schedule

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Fee Schedule**.



2. Click the Edit icon. The **Fee Schedule** dialog box appears.



Fee Schedule Code/Name: Number and name that identifies the fee schedule.

[Money Buckets]: Repositories for amounts you want to record in Latitude.

Alloc %: (Allocation percent) Percentage of the payment amount to allocate to the money bucket. The amount available to allocate toward a money bucket is the remaining payment amount to allocate times the money bucket's allocation rate. When Latitude allocates all the money buckets and an amount to pay remains, Latitude allocates the remaining amount based on priority. If the balance in a money bucket is less than the allocation amount, the remaining allocation amount becomes available to allocate to other money buckets with a lower priority.

PU: (Paid Us) If selected, client invoices include the amounts shown or paid into the money bucket for this payment type.

PC: (Paid Client) If selected, client invoices include the amounts shown or paid into the money bucket for this payment type.

PA: (Paid Agency) If selected, client invoices include the amounts shown or paid into the money bucket for this payment type.

Priority: Order in which to apply payments to the corresponding money bucket. Latitude applies payments to the money bucket with a priority of "1" first. If there are funds remaining, the system applies the payment to the bucket set as priority 2. The system continues applying the payment until no funds remain or the account balance is zero. If the account has a balance after applying the full payment amount received, the system applies the next payment you receive to the highest priority bucket that has a balance remaining. Generally, you order the priority from 1 to 10, from top to bottom.

To: Account balance range in which to apply fees. The first **To** column is always active, and indicates the first (or only) account balance range to use for the specified fee. For example, if you set the fee code to apply for balances from $0 to $999.99, this fee is the only one applied to the account. You may want to accept the default, which is $0 to $100000000 (so as not to activate any other fee schedule columns).

[Percent]: Percentage to set as the fee for each money bucket for the specified account balance range. For example, if you type an amount of "25," all payments applied toward the Principal bucket generate a fee of 25 percent of the money collected.

3. In the **Alloc %** column, specify the percentage of the payment amount to allocate to each money bucket.
4. In the **PU**, **PC**, and **PA** column, select or clear the check boxes to indicate whether to include these payment types on client invoices.

Note: If you don't select at least one of these check boxes, the system displays a warning message. To continue without selecting a check box, click **OK**.

5. In the **Priority** column, specify the order in which to apply payments.
6. In the **To** column, do the following:
    a. Specify the beginning and ending account balance range in which to apply fees.
    b. Specify the percent to calculate as the fee for each money bucket.
7. To set up subsequent account balance ranges, do the following:
    a. Click the plus sign (**+**). The system inserts a column.
    b. Type the next account balance range to use for applying fees.
    c. Specify the percent to calculate as the fee for each money bucket.

Tip: To delete a "To" column, click the minus sign (**-**).

8. Click **Save**.

Related Topics

Search for a Permission or System Code

Data Grids

Fee Schedules

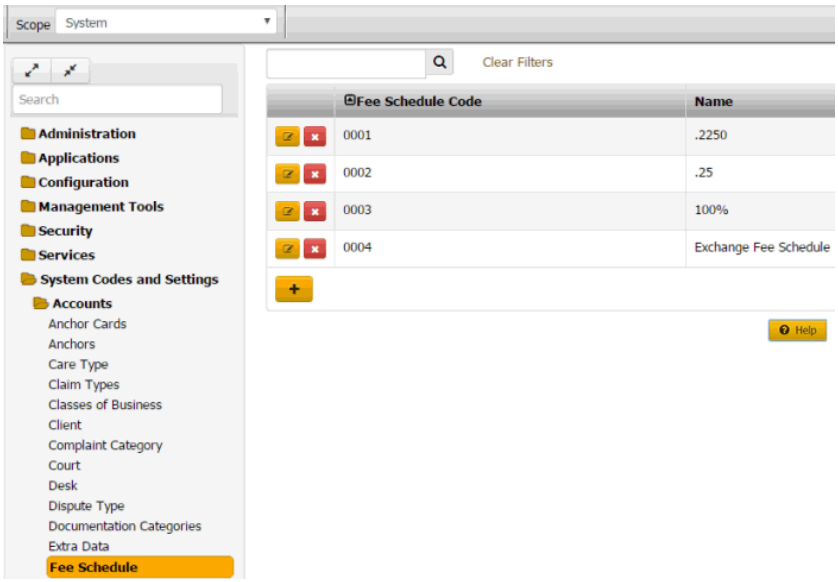
Feedback

Delete a Fee Schedule

Use the **Fee Schedule** tab to delete a fee schedule.

To delete a fee schedule

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Fee Schedule**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Search for a Permission or System Code

Data Grids

Fee Schedules

Hardship Types

Feedback

Hardship Types

You can add, modify, and delete financial hardship types, such as unemployment, short-term illness, and reduced income. Users specify a hardship type when creating financial hardship cases. For more information, see Add a Care or Financial Hardship Case.

Related Topics

Add a Hardship Type

Modify a Hardship Type

Delete a Hardship Type

Add a Care or Financial Hardship Case

Modify a Care or Financial Hardship Case

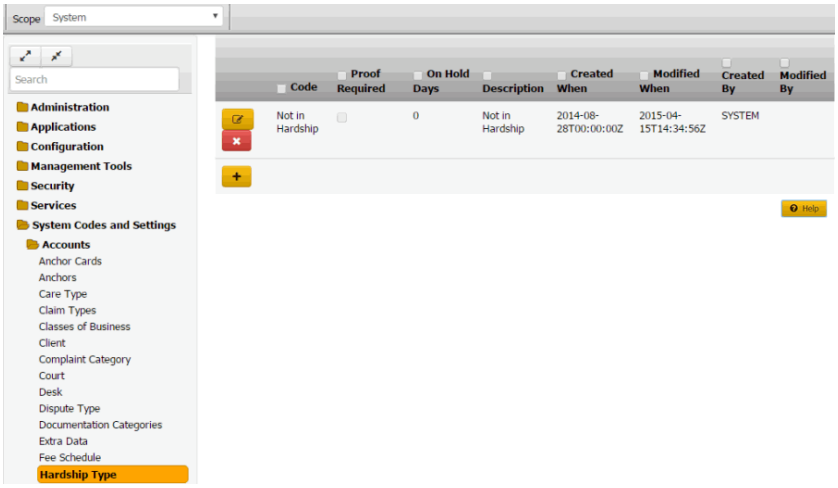
Feedback

Add a Hardship Type

Use the **Hardship Type** panel to add a financial hardship type.

To add a hardship type

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Hardship Type**.



Code: Code that identifies the type of financial hardship.

Proof Required: If selected, your organization requires proof of the financial hardship.

On Hold Days: Default number of days to place the account on hold to suspend collection activity.

Description: Description of the hardship type.

Created When: Date and time a user created this hardship type.

Modified When: Date and time a user last modified this hardship type.

Created By: User who created this hardship type.

Modified By: User who last modified this hardship type.

2. Click the plus sign (+). A blank row appears in the data grid.
3. Complete the information and then click the check mark.

Related Topics

Hardship Types

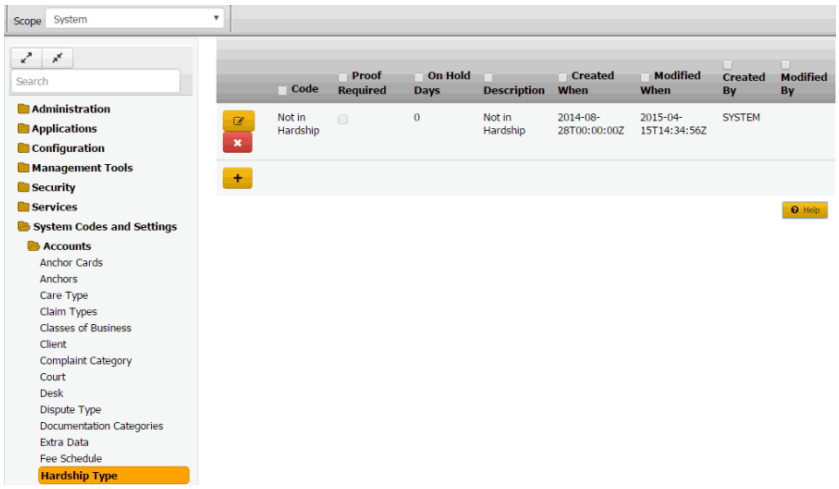
Account Codes

Modify a Hardship Type

Use the **Hardship Type** panel to modify a financial hardship type.

To modify a hardship type

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Hardship Type**.



Code: Code that identifies the type of financial hardship.

Proof Required: If selected, your organization requires proof of the financial hardship.

On Hold Days: Default number of days to place the account on hold to suspend collection activity.

Description: Description of the hardship type.

Created When: Date and time a user created this hardship type.

Modified When: Date and time a user last modified this hardship type.

Created By: User who created this hardship type.

Modified By: User who last modified this hardship type.

2. Click the Edit icon. The hardship type appears in edit mode.
3. Modify the information and then click the check mark.

Related Topics

Hardship Types

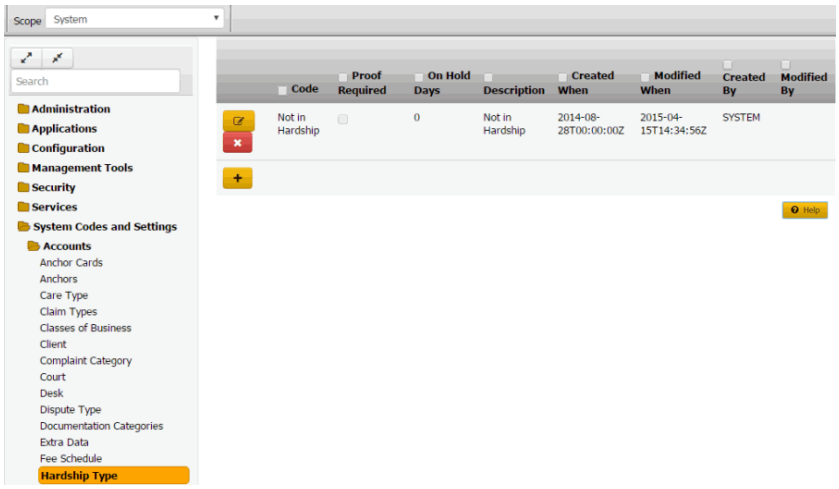
Account Codes

Delete a Hardship Type

Use the **Hardship Type** panel to delete a financial hardship type.

To delete a hardship type

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Hardship Type**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Hardship Types

Account Codes

Legal Court Case Statuses

Feedback

Legal Court Case Statuses

You can search for, add, modify, and delete court case statuses. Users specify a court case status when creating or maintaining legal cases. For more information, see Maintain General Legal Information.

Related Topics

Add a Court Case Status

Modify a Court Case Status

Delete a Court Case Status

Search for a Permission or System Code

Data Grids

Account Codes

Maintain General Legal Information

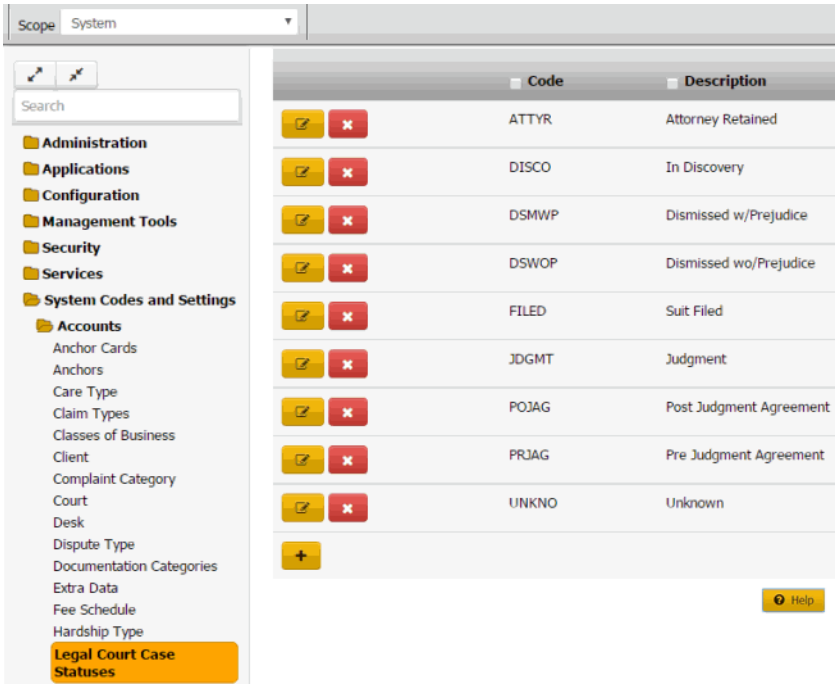
Feedback

Add a Court Case Status

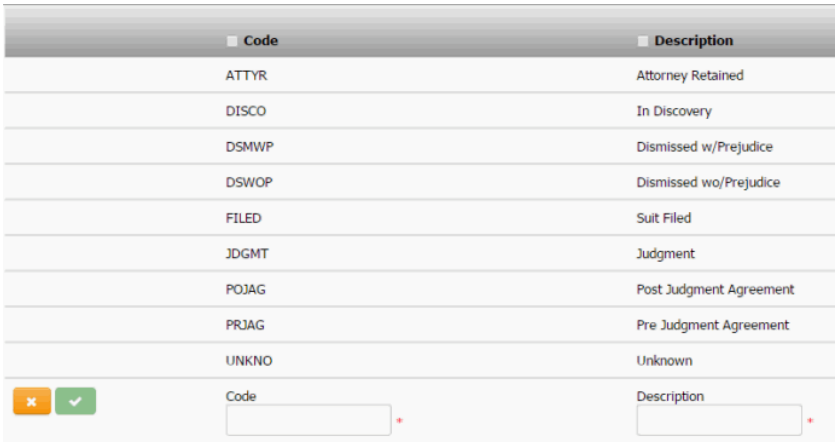
Use the **Legal Court Case Statuses** panel to add a court case status.

To add a court case status

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Legal Court Case Statuses**.



2. Click the plus sign (+). A blank row appears in the data grid.



3. In the **Code** box, type a unique code for the court case status.
4. In the **Description** box, type a description of the court case status.
5. Click the check mark.

Related Topics

[Search for a Permission or System Code]

[Data Grids]

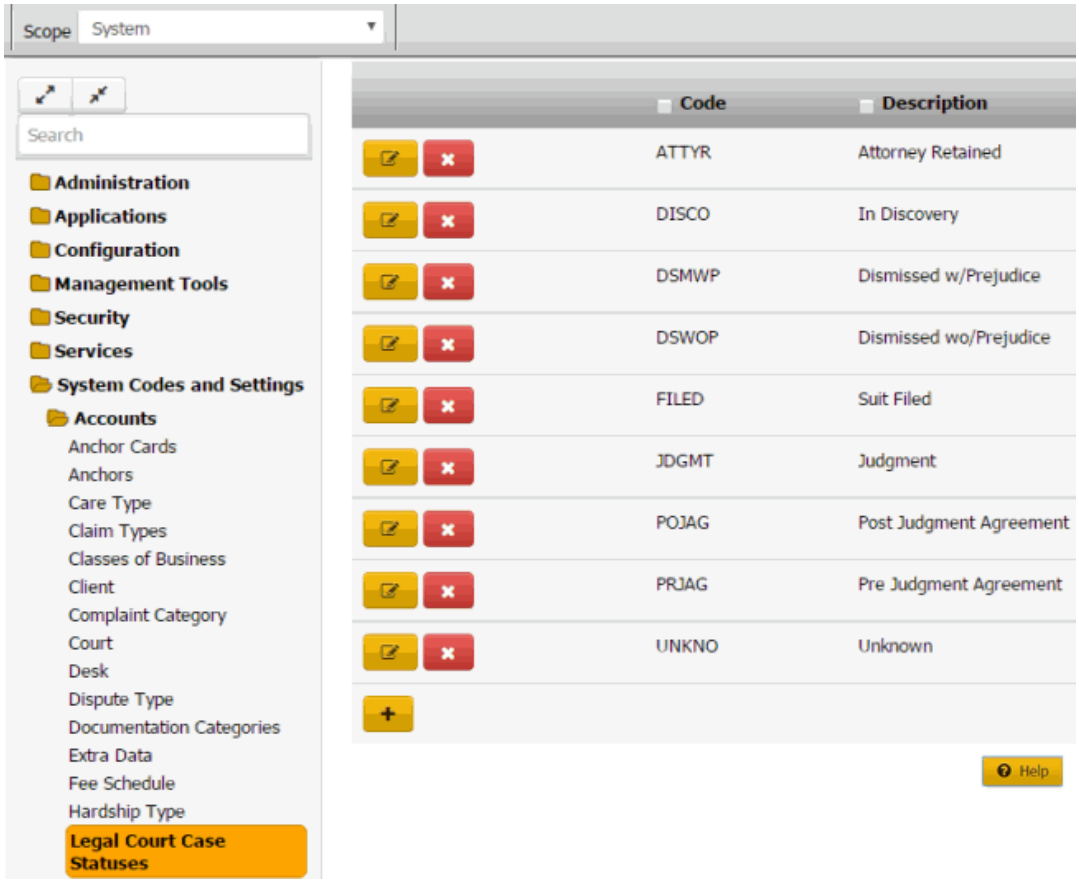
[Legal Court Case Statuses]

Modify a Court Case Status

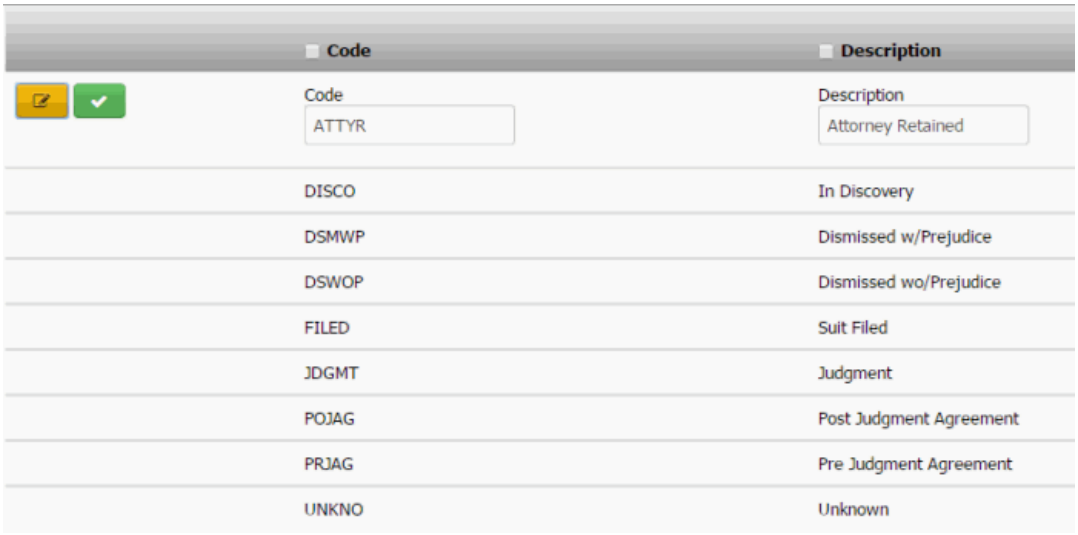
Use the **Legal Court Case Statuses** panel to modify a court case status.

To modify a court case status

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Legal Court Case Statuses**.



2. Click the Edit icon. The court case status appears in edit mode.



	Code	Description
	Code ATTYR	Description Attorney Retained
	DISCO	In Discovery
	DSMWP	Dismissed w/Prejudice
	DSWOP	Dismissed wo/Prejudice
	FILED	Suit Filed
	JDGMT	Judgment
	POJAG	Post Judgment Agreement
	PRJAG	Pre Judgment Agreement
	UNKNO	Unknown

3. Modify the information and then click the check mark.

Related Topics

Search for a Permission or System Code

Data Grids

Legal Court Case Statuses

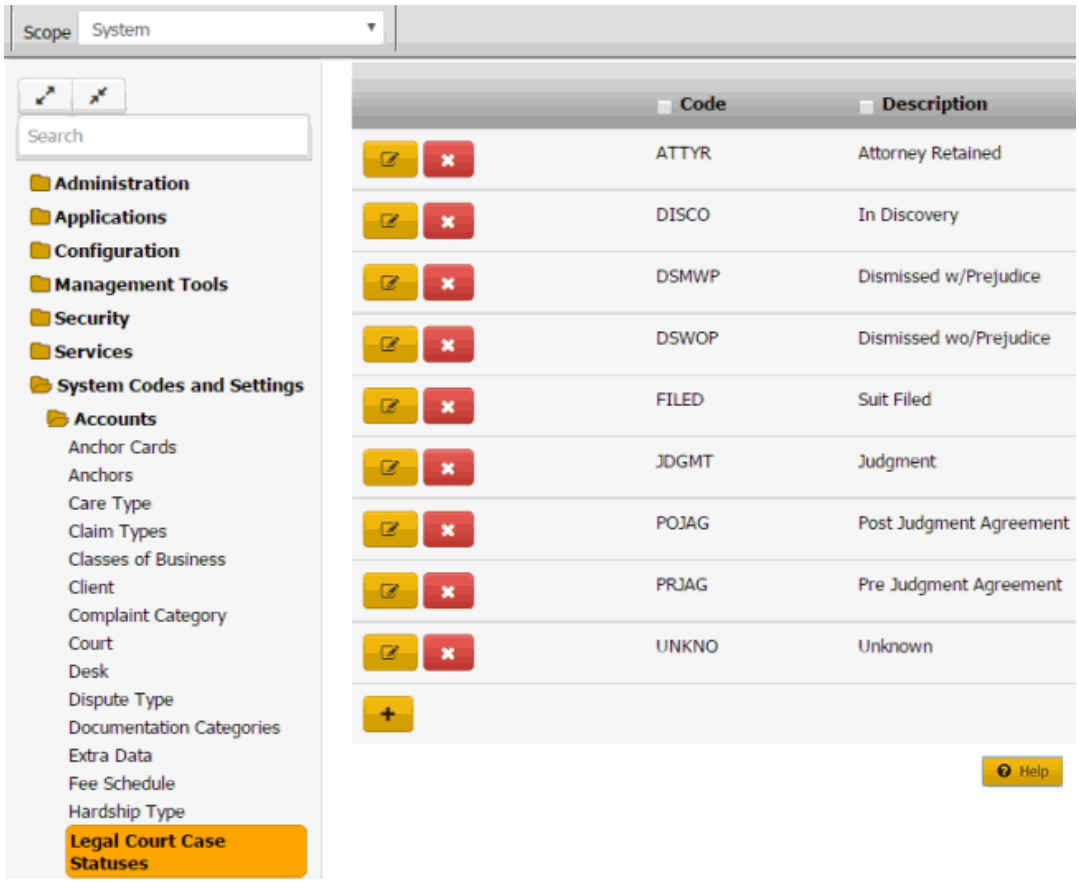
Feedback

Delete a Court Case Status

Use the **Legal Court Case Statuses** panel to delete a court case status.

To delete a court case status

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Legal Court Case Statuses**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Search for a Permission or System Code

Data Grids

Legal Court Case Statuses

Letter Types

Letter Types

You can search for, add, modify, and delete letter types. User-defined letters have no functionality associated to them and Latitude cannot determine what type of letter it is. If you need specific functionality associated to a letter, use a system-defined letter. For example, if you want to send a settlement letter, use the system-defined settlement letter.

Related Topics

Add a Letter Type

Modify a Letter Type

Delete a Letter Type

Search for a Permission or System Code

Data Grids

Account Codes

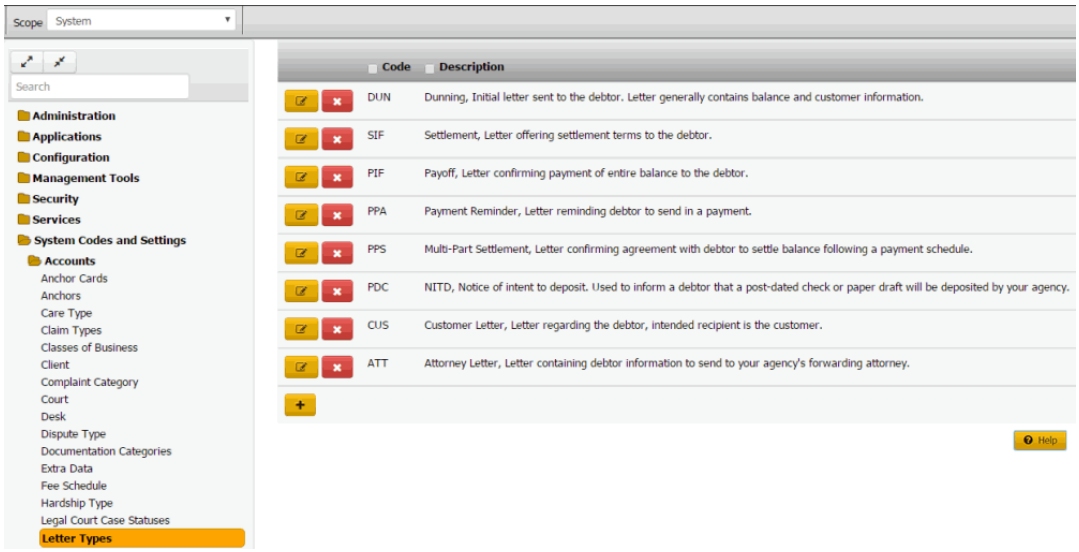
Feedback

Add a Letter Type

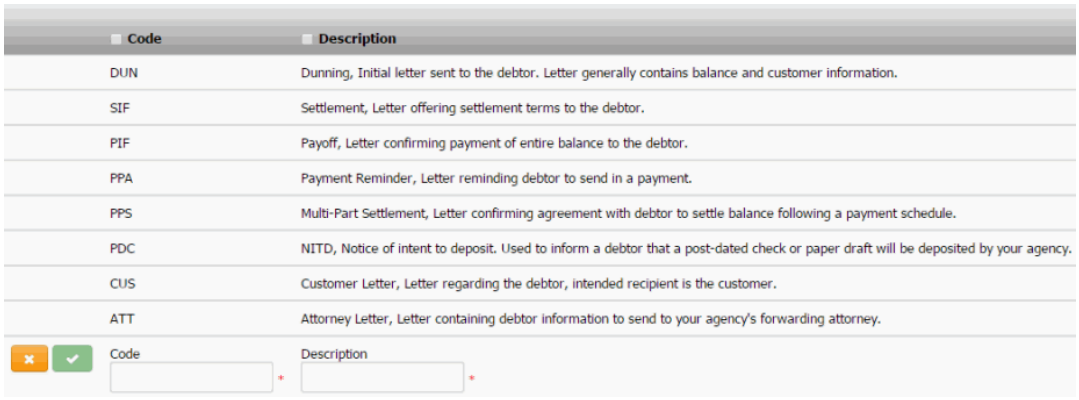
Use the **Letter Types** panel to add a letter type.

To add a letter type

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Letter Types**.



2. Click the plus sign (+). A blank row appears in the data grid.



3. Complete the information and then click the check mark.

Related Topics

Search for a Permission or System Code

Data Grids

Letter Types

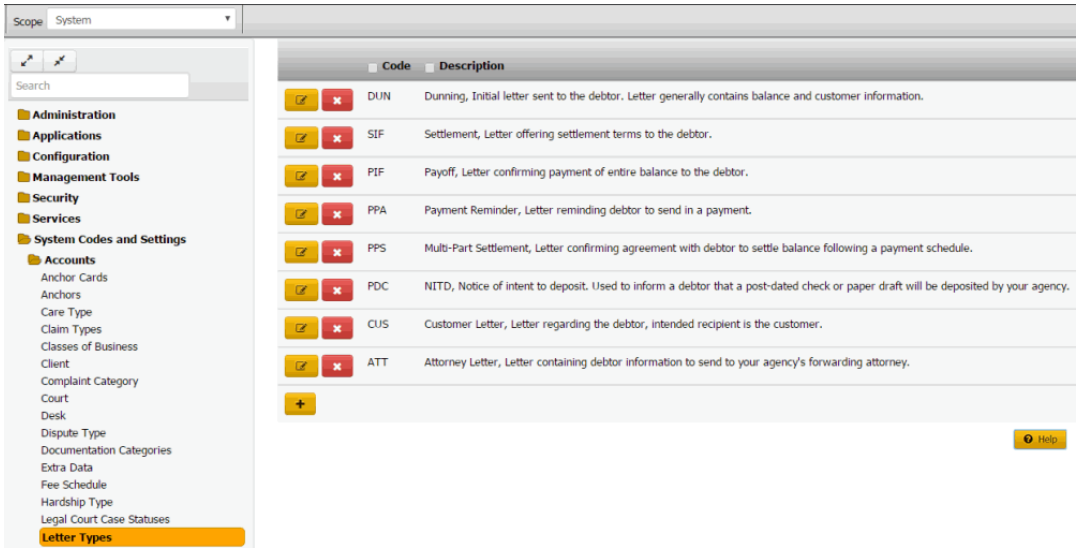
Feedback

Modify a Letter Type

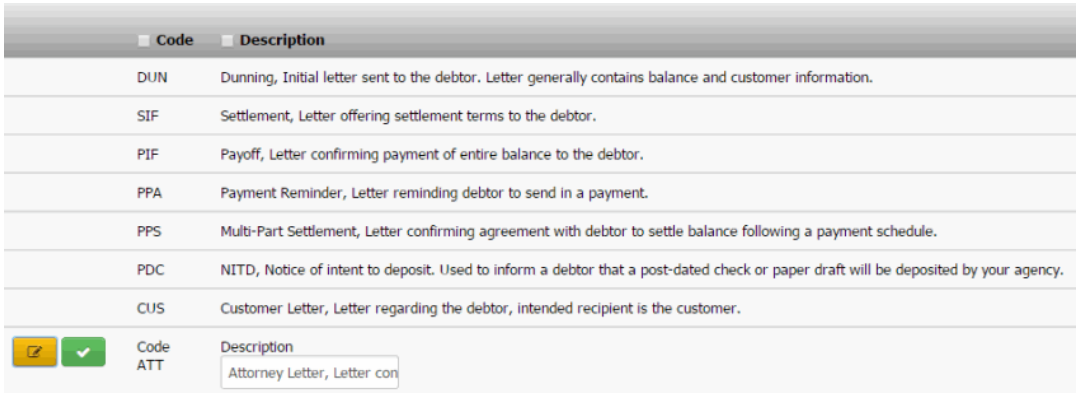
Use the **Letter Types** panel to modify a letter type.

To modify a letter type

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Letter Types**.



2. Click the Edit icon. The letter type appears in edit mode.



3. Modify the information and then click the check mark.

Note: For system-level letter types, you cannot modify the code.

Related Topics

Search for a Permission or System Code

Data Grids

Letter Types

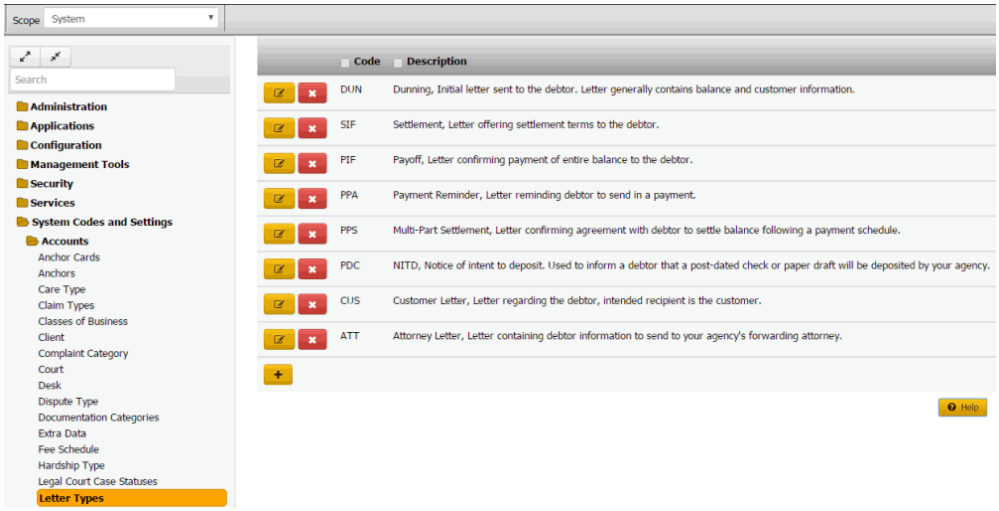
Feedback

Delete a Letter Type

Use the **Letter Types** panel to delete a letter type. You cannot delete system-defined letter types.

To delete a letter type

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Letter Types**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Search for a Permission or System Code

Data Grids

Letter Types

List Codes

Feedback

List Codes

You can modify user-defined list codes and associate data to the list codes. You cannot add list codes or modify system-defined list codes. List codes allow your organization to specify data to use in related panels in Latitude.

Code	Display Name	Description	See...
ADDRCNFSRC	Address Confirmation Source	Source who confirmed the validity of the address.	• Add an Address • Modify an Address
ADDRSRC	Address Source	Source who provided the address, such as customer, client, or credit bureau.	• Add an Address • Modify an Address

ADDRSTATUS	Address Status	Status of the address, such as good, bad, or unknown.	• Add an Address • Modify an Address
ADDRTYPE	Address Type	Type of address, such as home or work.	• Add an Address • Modify an Address
BKRREAMET	Bankruptcy Reaffirm Method	Method through which the court discharges account. Visible when the bankruptcy chapter is "7".	Maintain General Bankruptcy Information
BKRPTSTAT	Bankruptcy Status	Status of the bankruptcy.	Maintain General Bankruptcy Information
BKRSURMEA	Bankruptcy Surrender Method	How the customer surrendered the item (for example, shipped or picked up). Visible when the bankruptcy chapter is "7" and the bankruptcy method is "surrender."	Maintain General Bankruptcy Information
CBRACTSTAT	CBR Account Status	Code that identifies the reporting status of the account, such as assigned to internal or external collections.	View Credit Bureau Reporting Account Information
CBRACCTTYP	CBR Account Type	Code that identifies the account type, such as collection agency or business credit card.	View Credit Bureau Reporting Account Information
CBRADDRIND	CBR Address Indicator	Type of address, such as home, business, or military.	View Credit Bureau Reporting Account Information
CBRCMPLCND	CBR Compliance Condition	Code that identifies the compliance condition, such as "account information disputed by consumer under FCRA."	View Credit Bureau Reporting Account Information
CBRCREDCLS	CBR Creditor Classes	Class of business assigned to the account for reporting to credit bureaus.	View Credit Bureau Reporting Account Information
CBRECOACD	CBR ECOA Code	Equal Credit Opportunity Act code that identifies who is responsible for repayment of the debt, such as individual or joint.	View Credit Bureau Reporting Account Information

CBRINFOIND	CBR Information Indicator	Credit bureau consumer information indicator, such as reaffirmation of debt or petition for Chapter 7 bankruptcy.	View Credit Bureau Reporting Account Information
CBRPTFLTYP	CBR Portfolio Types	Code that identifies the portfolio to which the account belongs.	View Credit Bureau Reporting Account Information
CBRRESCD	CBR Residence Codes	Residence status, such as owns or rents.	View Credit Bureau Reporting Account Information
CBRSPECCMT	CBR Special Comment	Code that identifies a note about the account, such as "debt paid through insurance."	View Credit Bureau Reporting Account Information
CBRTRNSTYP	CBR Transaction Type	Code that identifies the type of account transaction, along with a description.	View Credit Bureau Reporting Account Information
COMPLTAGST	Complaint Against	Category for who or what the complaint is against, such as third party, branch, department, or user.	• Add a Complaint • Modify a Complaint
COMPLTJST	Complaint Justified	Indicates whether the complaint is justified.	• Add a Complaint • Modify a Complaint
COMPLTOUT	Complaint Outcome	Outcome of the complaint, such as training required or disciplinary action.	• Add a Complaint • Modify a Complaint
COMPLTROOT	Complaint Root Cause	Root cause of the complaint.	• Add a Complaint • Modify a Complaint
COMPLTSTAT	Complaint Status	Status of the complaint.	• Add a Complaint • Modify a Complaint
COMPLTTYPE	Complaint Type	Type of complaint, such as human or system error.	• Add a Complaint • Modify a Complaint
COND	Condition	Condition of the vehicle when the agent repossessed it.	Maintain Repossession Information
DISPUTEAGT	Dispute Against	Person that the dispute is against, such as client or third party.	• Add a Dispute • Modify a Dispute
DISPUTECAT	Dispute Category	Dispute category, such as fraud or wrong trace.	• Add a Dispute • Modify a Dispute
DISPUTEJST	Dispute Justified	Indicates whether the dispute is justified.	• Add a Dispute

			• Modify a Dispute
DISPUTEOUT	Dispute Outcome	Outcome of the dispute, such as account on hold or unable to resolve.	• Add a Dispute • Modify a Dispute
DISPUTEREF	Dispute Referred By	Person who referred the dispute, such as a third party or the client.	• Add a Dispute • Modify a Dispute
EMADDRTYPE	Email Address Type	Type of email address, such as home or work.	• Add an Email Address • Modify an Email Address
GENDER	Gender	Person's gender.	• Maintain Contact Information • Add an Insurance Policy • Modify an Insurance Policy
INSCATEG	Insurance Category	Type of insurance (for example, primary or secondary).	• Add an Insurance Policy • Modify an Insurance Policy
REINLIPO	Internal Lien Position	Your organization's position in line in regard to benefitting from collateral liquidation.	Maintain Real Estate Collateral
LEASEREPO	Lease End Repo	Indicates whether the lease ended or the agent repossessed the vehicle.	Maintain Repossession Information
MARITLSTAT	Marital Status	Patient's marital status.	• Add Patient Information • Modify Patient Information
ORDTYP	Order Type	Repossession order type.	Maintain Repossession Information
REOTLIPO	Other Lien Holder Position	Position in line of other lien holders in regard to benefitting from collateral liquidation.	Maintain Real Estate Collateral
PREFIX	Prefix	Person's name prefix.	• Maintain Contact Information • Add a Party to an Account
REPROTYP	Property Type	Type of property, such as single family residence or raw land.	Maintain Real Estate Collateral
REPROVAC	Property Vacant	Property occupancy, such as vacant or occupied.	Maintain Real Estate Collateral
RDNCLOREA	RDN Close Reason	Reason for closing the case.	Close an RDN Case

RDNDISTYP	RDN Disposition Type	N/A	N/A
RDNHOLREA	RDN Hold Reason	Reason for placing the case on hold.	Place an RDN Case on Hold
RDNKEYTYP	RDN Key Type	Type of ignition key, such as single or double cut.	Maintain Vehicle Collateral Information
RDNODOTYP	RDN Odometer Type	Type of odometer, such as digital or analog.	Maintain Vehicle Collateral Information
RDNORDTYP	RDN Order Type	Type of order requested, such as vehicle transport or repossession	Create an RDN Case
RDNOVECON	RDN Overall Condition	N/A	N/A
RDNSTATYP	RDN Status Type	N/A	N/A
RDNUPDPRI	RDN Update Priority	Urgency of the update for the recovery agent or agency.	Send a Case Update to RDN
RDNUPDTYP	RDN Update Types	Type of update to send to RDN, such as account closed or address update.	Send a Case Update to RDN
REFERREDBY	Referred By	Person who referred the complaint or dispute, such as third party, client, or user.	• Add a Complaint • Modify a Complaint • Add a Dispute • Modify a Dispute
RELEASED	Released	Method of releasing the collateral.	Maintain Repossession Information
REPLSTAT	Replevin Status	Status of the recovery.	Maintain Vehicle Collateral Information
REPOACT	Repo Action	Action that prompted the repossession.	Maintain Repossession Information
SRCPUBC	Source Publication	Source from which your organization obtained the appraisal (for example, Kelley Blue Book).	• Add an Appraisal • Modify an Appraisal
STATE	State	N/A	N/A
STAT	Status	Status of the vehicle repossession.	Maintain Repossession Information
RESTATUS	Status	Current status of the property.	Maintain Real Estate Collateral
SUFFIX	Suffix	Person's name suffix.	• Maintain Contact Information • Add a Party to an Account
TITLEPOS	Title Position	Type of title (for example, original, duplicate).	Maintain Vehicle Collateral Information

RETYOSAL	Type of Sale	Indicates whether the foreclosure sale is judicial (through a court process) or non-judicial (without a court's involvement).	Maintain Real Estate Collateral

Related Topics

Modify a List Code

Add List Data

Modify List Data

Search for a Permission or System Code

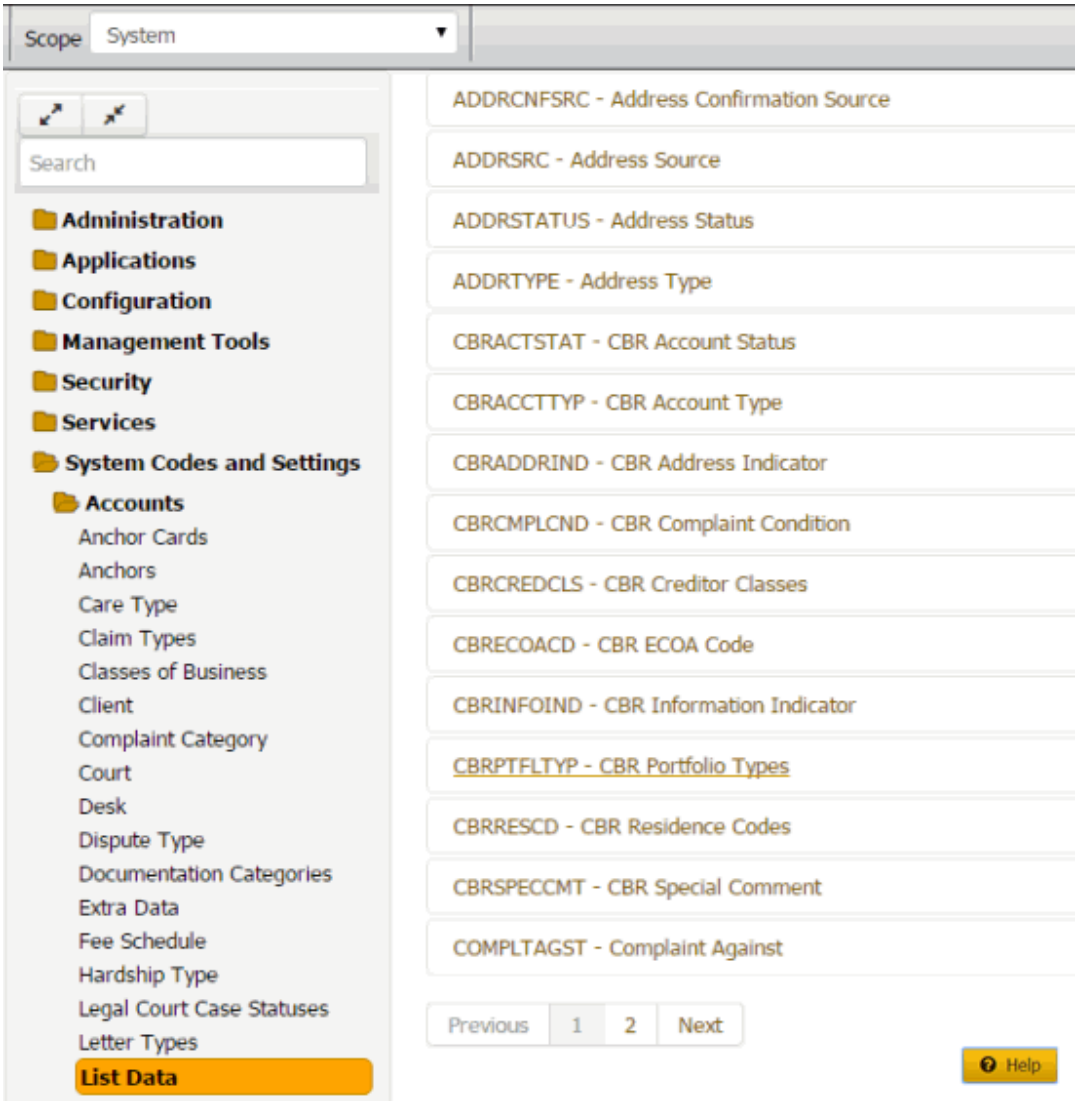
Account Codes

Modify a List Code

Use the **List Data** panel to modify a custom list code. You cannot modify system-defined list codes.

To modify a list code

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **List Data**.



2. Click the list code to modify. The list code expands.

List Code: Unique code that identifies the custom list.

Namespace: Alternate name for the custom list.

Display Name: Name of the custom list. This name appears when displaying the list in a custom panel.

Description: A description of the custom list.

Code is Numeric: If selected, the list data identifier is numeric. If cleared, the list data identifier is alphanumeric.

Code Length Max: Maximum number of characters allowed for the list data identifier.

Description Length Max: Maximum number of characters allowed for the list data description.

3. Modify the information and then click **Save**.

Related Topics

Search for a Permission or System Code

List Codes

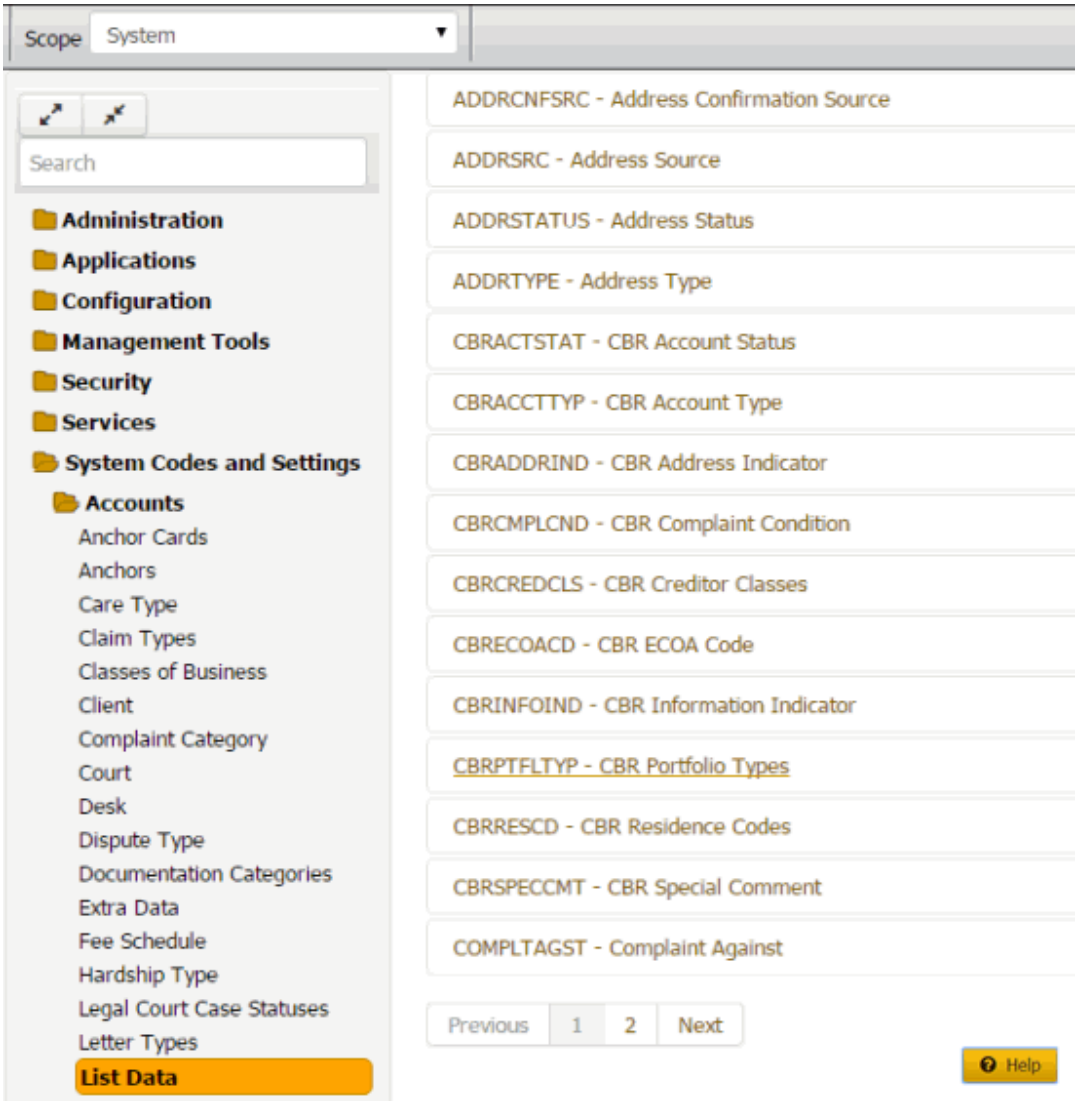
Feedback

Add List Data

Use the **List Data** panel to add data to a custom list.

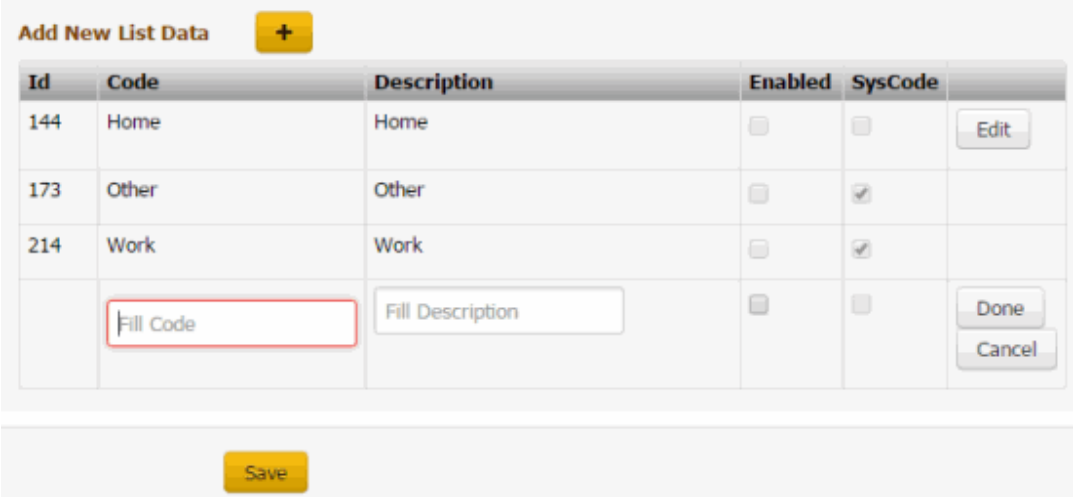
To add list data

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **List Data**.



2. Click the list code to which to add list data. The list code expands.

3. Next to **Add New List Data**, click the plus sign (+). A blank row appears in the data grid.



ID: Code that the system assigns to identify the custom list data.

Code: Code that you assign to identify the custom list data. The system limits the maximum number of characters allowed to what is set as the **Code Length Max** in the List Code section.

Description: Description of the custom list data. The system limits the maximum number of characters allowed to what is set as the **Description Length Max** in the List Code section.

Enabled: If selected, you want the custom list data to appear on a custom panel. You cannot delete list data; however, you can clear this check box so that the data doesn't appear on a custom panel.

SysCode: If selected, all list data that you add to this custom list is system-defined. If cleared, the list data is user-defined. Users cannot select or clear this check box.

4. Complete the information and then click **Done**.

5. Click **Save**. The system assigns an ID to the list data item.

Related Topics

Search for a Permission or System Code

List Codes

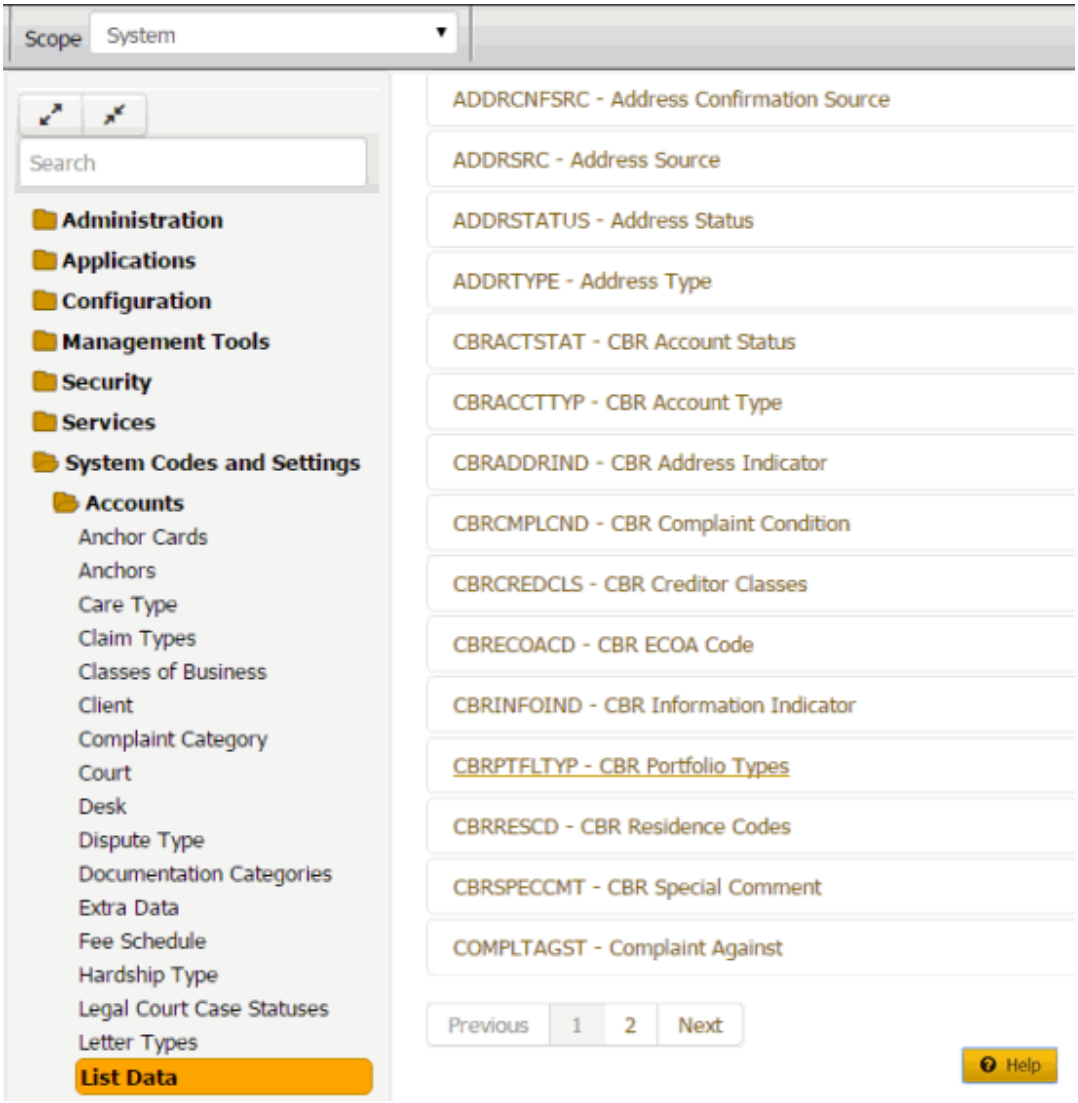
Feedback

Modify List Data

Use the **List Data** panel to modify data in a custom list. You cannot modify system-defined list data.

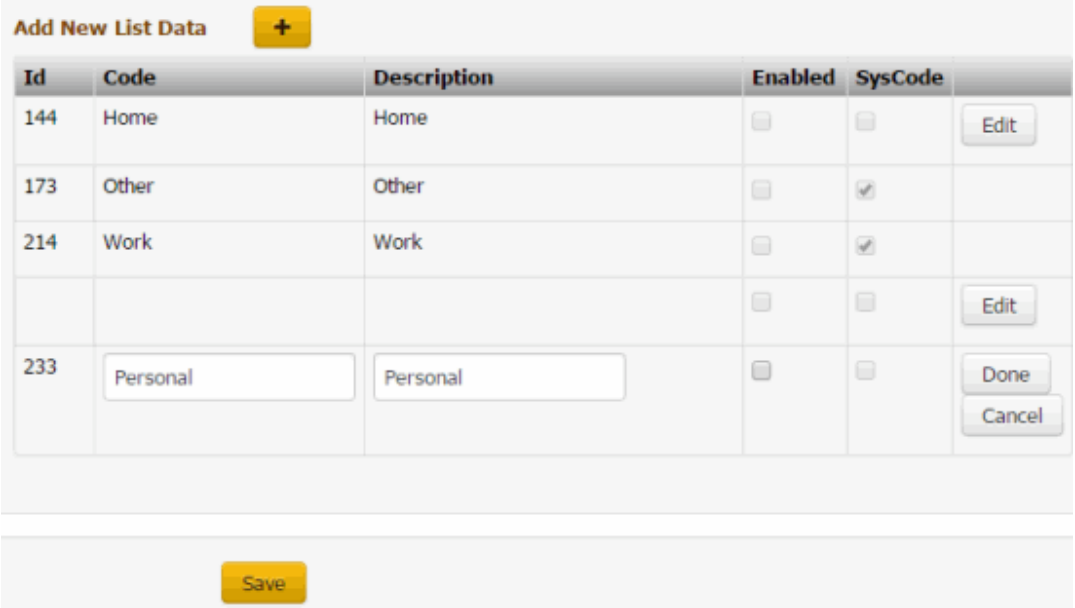
To modify list data4

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **List Data**.



2. Click the list code to modify. The list code expands.

3. In the data grid, click **Edit**. The data grid appears in edit mode.



ID: Code that the system assigns to identify the custom list data.

Code: Code that you assign to identify the custom list data. The system limits the maximum number of characters allowed to what is set as the **Code Length Max** in the List Code section.

Description: Description of the custom list data. The system limits the maximum number of characters allowed to what is set as the **Description Length Max** in the List Code section.

Enabled: If selected, you want the custom list data to appear on a custom panel. You cannot delete list data; however, you can clear this check box so that the data doesn't appear on a custom panel.

SysCode: If selected, all list data that you add to this custom list is system-defined. If cleared, the list data is user-defined. Users cannot select or clear this check box.

4. Modify the information and then click **Done**.
5. Click **Save**.

Related Topics

Search for a Permission or System Code

List Codes

Manual Process Stages

Manual Process Stages

You can flag processes as either manual or automated. For more information, see Processes and Stages.

Related Topics

Flag a Process as Manual or Automated

Search for a Permission or System Code

Data Grids

Account Codes

Process Stages

Processes and Stages

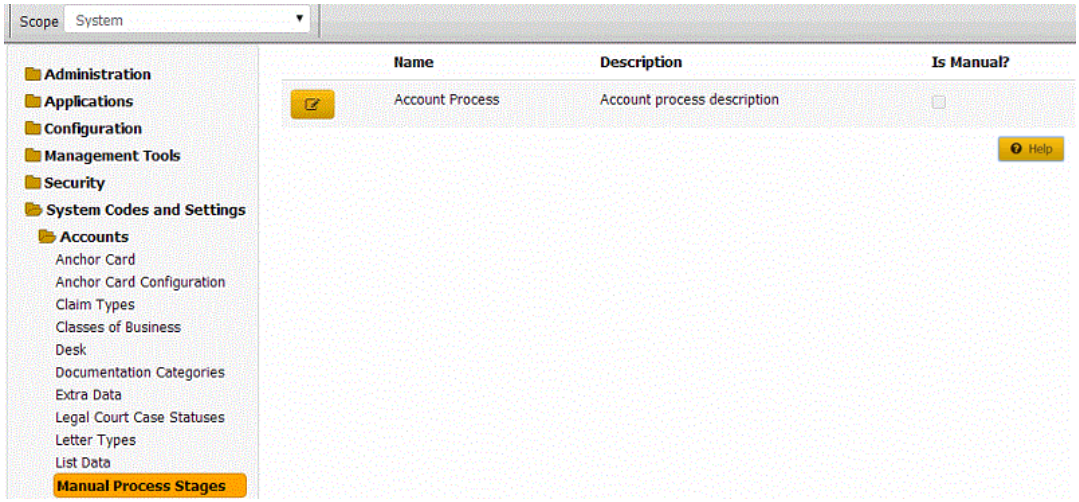
Feedback

Flag a Process as Manual or Automated

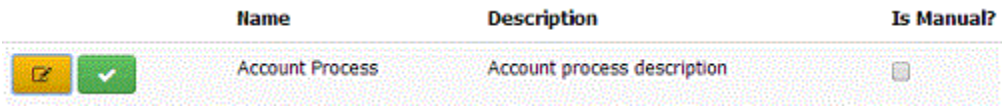
Use the **Manual Process Stages** panel to flag a process as manual or automated.

To flag a process as manual or automated

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Manual Process Stages**.



2. Click the Edit icon. The process appears in edit mode.



Is Manual: If selected, the process is manual. Users move the process to subsequent stages manually. If cleared, the process is automated. The system moves the process to subsequent stages automatically, based on the stage order set for the process.

3. Select or clear the check box and then click the check mark.

Related Topics

Search for a Permission or System Code

Data Grids

Manual Process Stages

Note Action Codes

Feedback

Note Action Codes

You can search for, add, modify, and delete action codes. Action codes represent the actions a user took on an account. When working an account, a user selects the action code that represents the action the user took on the account and Latitude records the action in the account notes. These codes are available on certain reports. Latitude releases with several standard action codes.

Note: Some Latitude system processes require specific codes. For more information, see Action and Result Codes.

Related Topics

Add a Note Action Code

Modify a Note Action Code

Delete a Note Action Code

Search for a Permission or System Code

Data Grids

Account Codes

Action and Result Codes

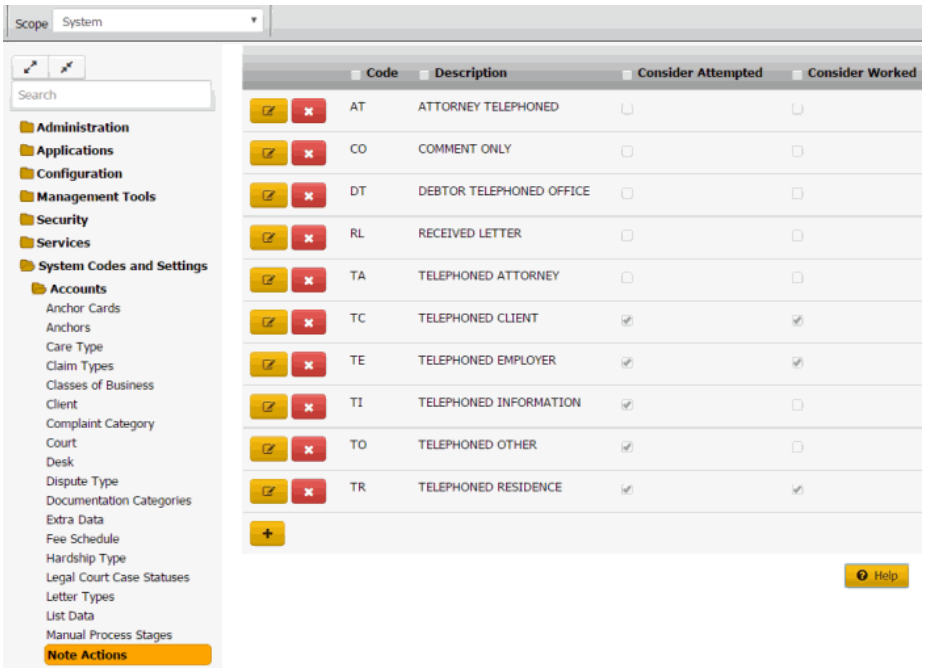
Feedback

Add a Note Action Code

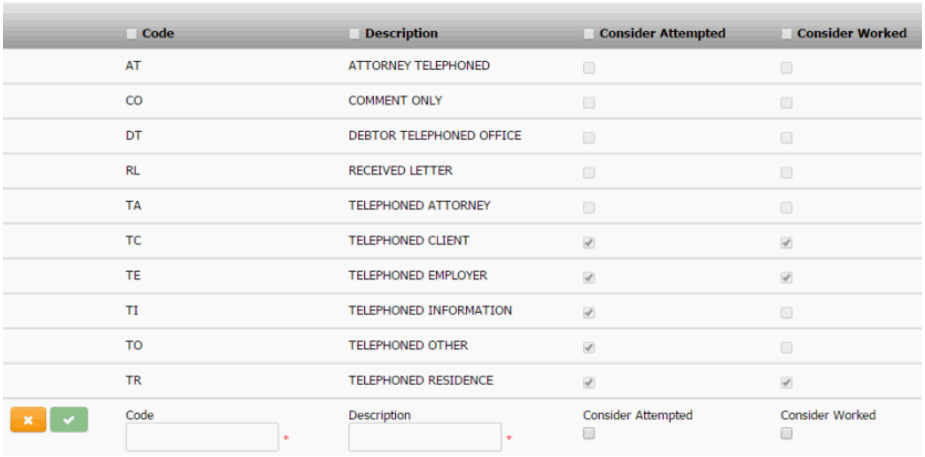
Use the **Note Actions** panel to add an action code for notes.

To add an action code

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Note Actions**.



2. Click the plus sign (+). A blank row appears in the data grid.



Code: Unique code that identifies the action.

Description: Description of the action.

Consider as attempted: If selected, the action code signifies an attempt at working the account.

Consider as worked: If selected, the action code signifies a worked account.

3. Complete the information and then click the check mark.

Related Topics

Search for a Permission or System Code

Data Grids

Note Action Codes

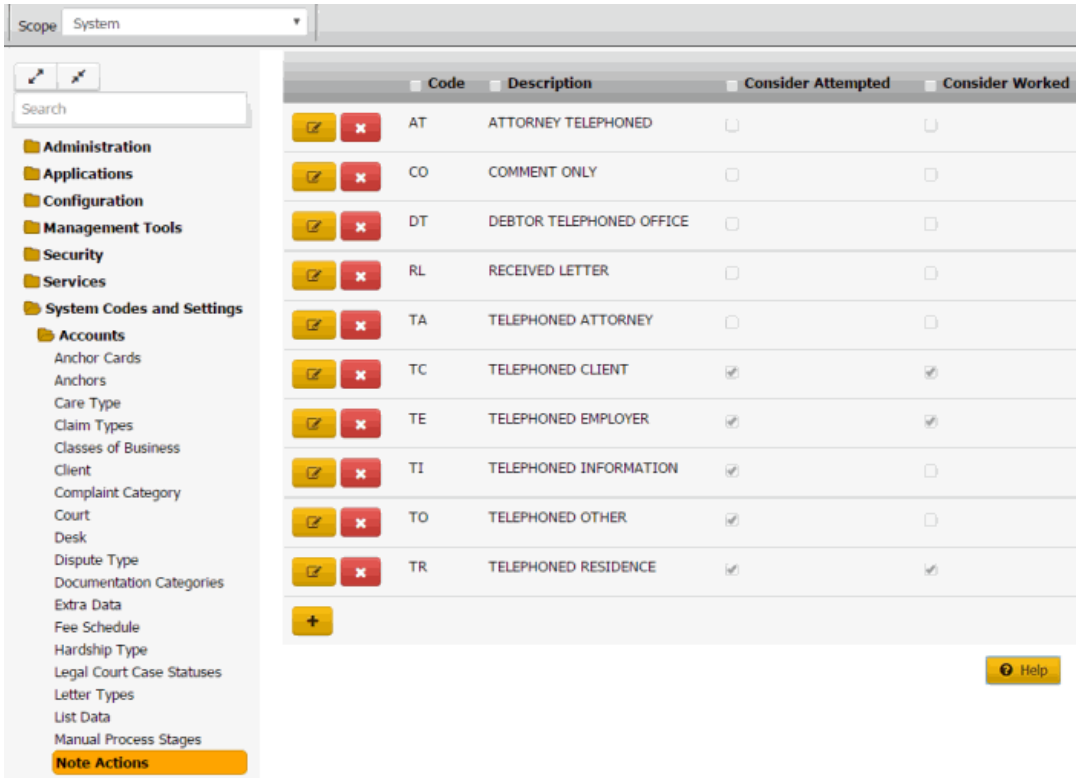
Feedback

Modify a Note Action Code

Use the **Note Actions** panel to modify an action code.

To modify an action code

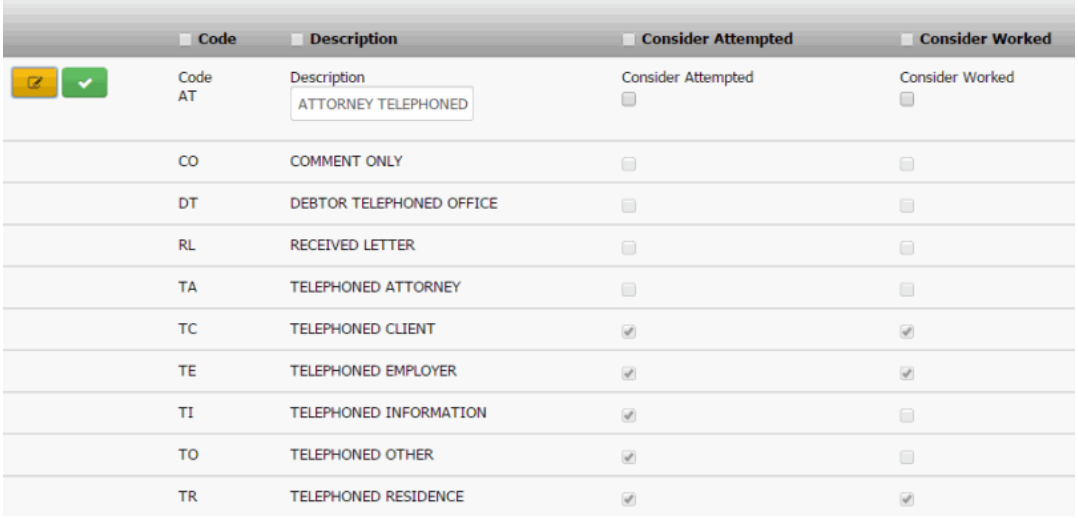
1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Note Actions**.



Consider as attempted: If selected, indicates that the action code signifies an attempt at working the account.

Consider as worked: If selected, indicates that the action code signifies a worked account.

2. Click the Edit icon. The action code appears in edit mode.



Code	Description	Consider Attempted	Consider Worked
Code AT	Description ATTORNEY TELEPHONED	Consider Attempted	Consider Worked
CO	COMMENT ONLY		
DT	DEBTOR TELEPHONED OFFICE		
RL	RECEIVED LETTER		
TA	TELEPHONED ATTORNEY		
TC	TELEPHONED CLIENT	✓	✓
TE	TELEPHONED EMPLOYER	✓	✓
TI	TELEPHONED INFORMATION	✓	
TO	TELEPHONED OTHER	✓	
TR	TELEPHONED RESIDENCE	✓	✓

Code: Unique code that identifies the action.

Description: Description of the action.

Consider as attempted: If selected, the action code signifies an attempt at working the account.

Consider as worked: If selected, the action code signifies a worked account.

3. Modify the information and then click the check mark.

Related Topics

Search for a Permission or System Code

Data Grids

Note Action Codes

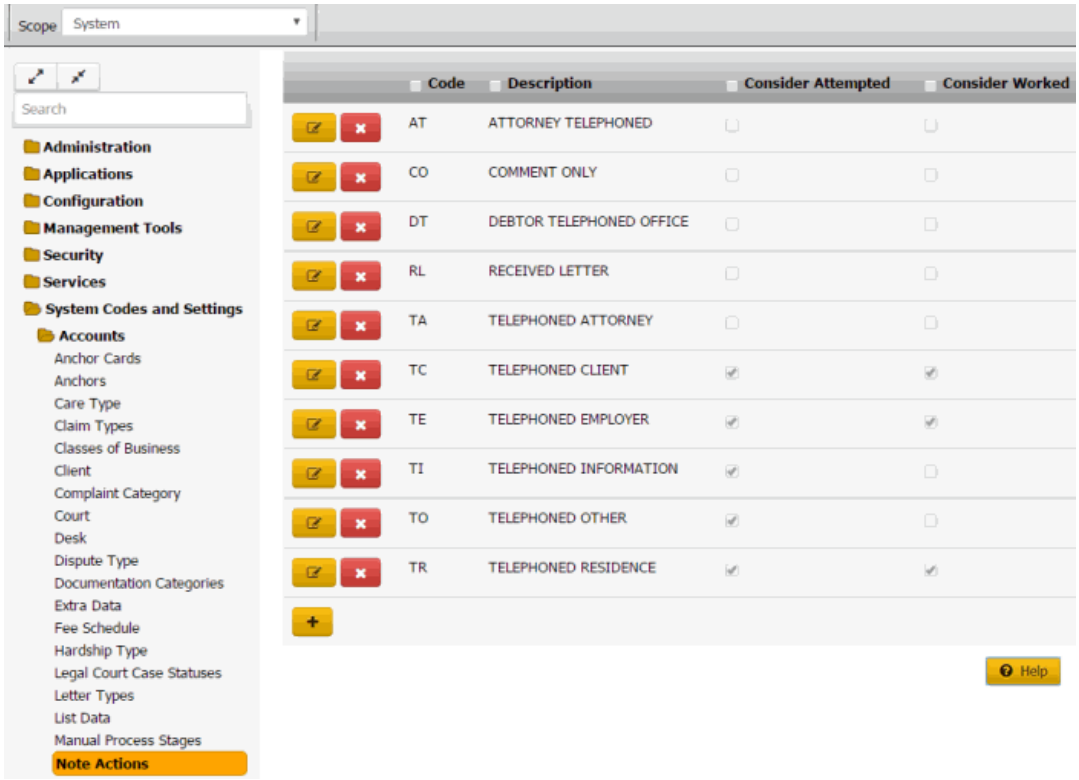
Feedback

Delete a Note Action Code

Use the **Note Actions** panel to delete an action code.

To delete an action code

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Note Actions**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Search for a Permission or System Code

Data Grids

Note Action Codes

Note Result Codes

Feedback

Note Result Codes

You can search for, add, modify, and delete result codes. Result codes represent the results of an action a user took on an account. When working an account, a user selects the result code that represents the result of an action the user took on the account. Latitude records the result in the account notes. Latitude uses result codes to count the number of accounts that each user worked and contacted.

Latitude releases with several standard result codes.

Note: Some Latitude system processes require specific result codes. For more information about system-utilized codes, see Action and Result Codes.

Related Topics

Add a Note Result Code

Modify a Note Result Code

Delete a Note Result Code

Search for a Permission or System Code

Data Grids

Account Codes

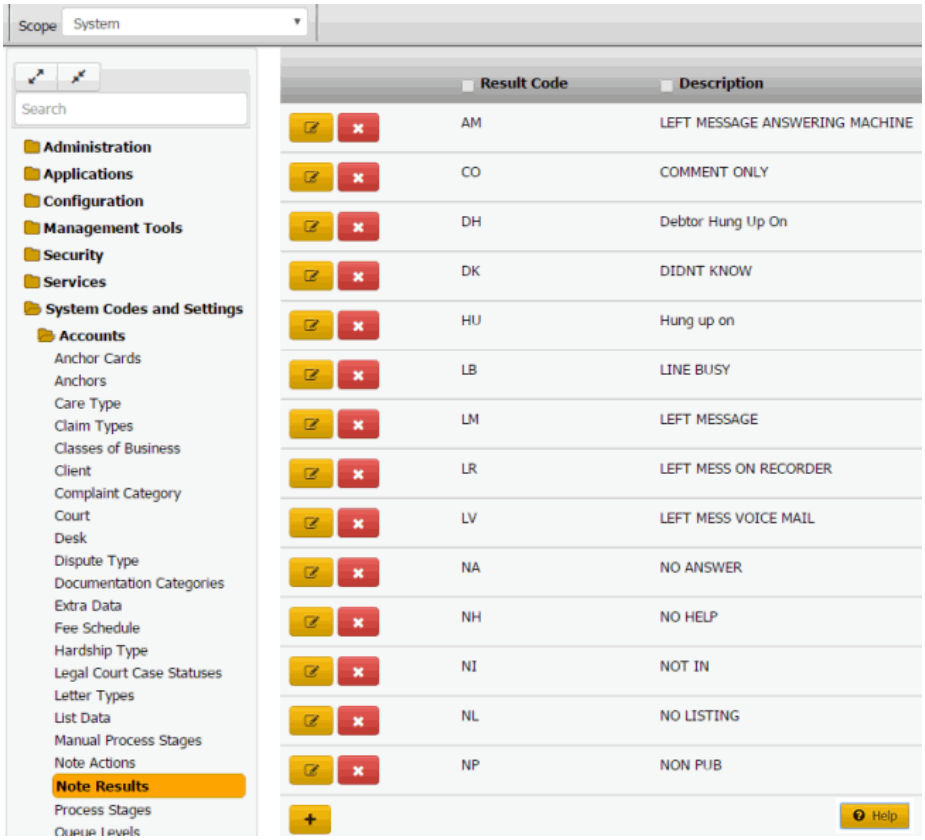
Feedback

Add a Note Result Code

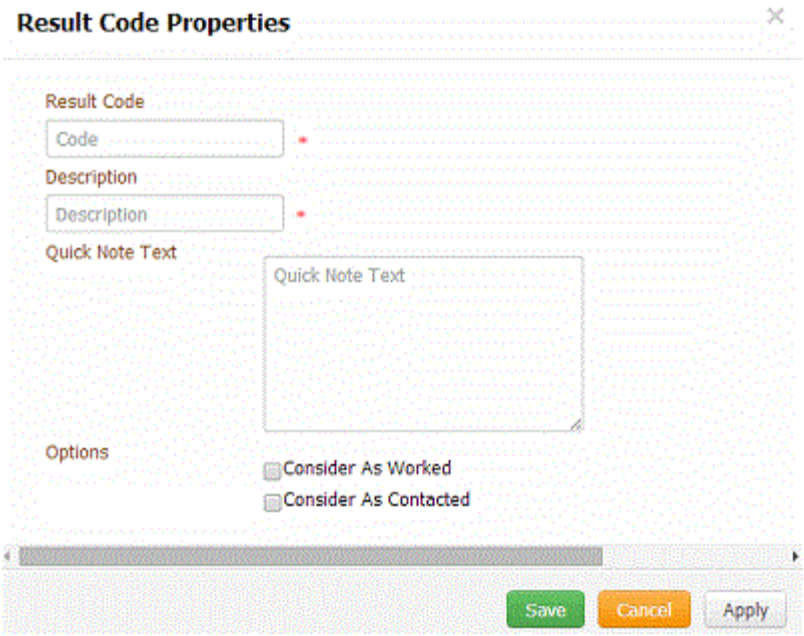
Use the **Result Code Properties** dialog box to add a result code.

To add a result code

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Note Results**.



2. Click the plus sign (+). The **Result Code Properties** dialog box appears.



Result Code: Unique (up to) five-character code that identifies an event.

Description: Description of the result code.

Quick Note Text: Default information to appear in the note. When users create a note using this result code, they can modify the quick note text.

Consider As Worked: If selected, the result code signifies a worked account.

Consider As Contacted: If selected, the result code signifies a contacted account.

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

Related Topics

Search for a Permission or System Code

Data Grids

Note Result Codes

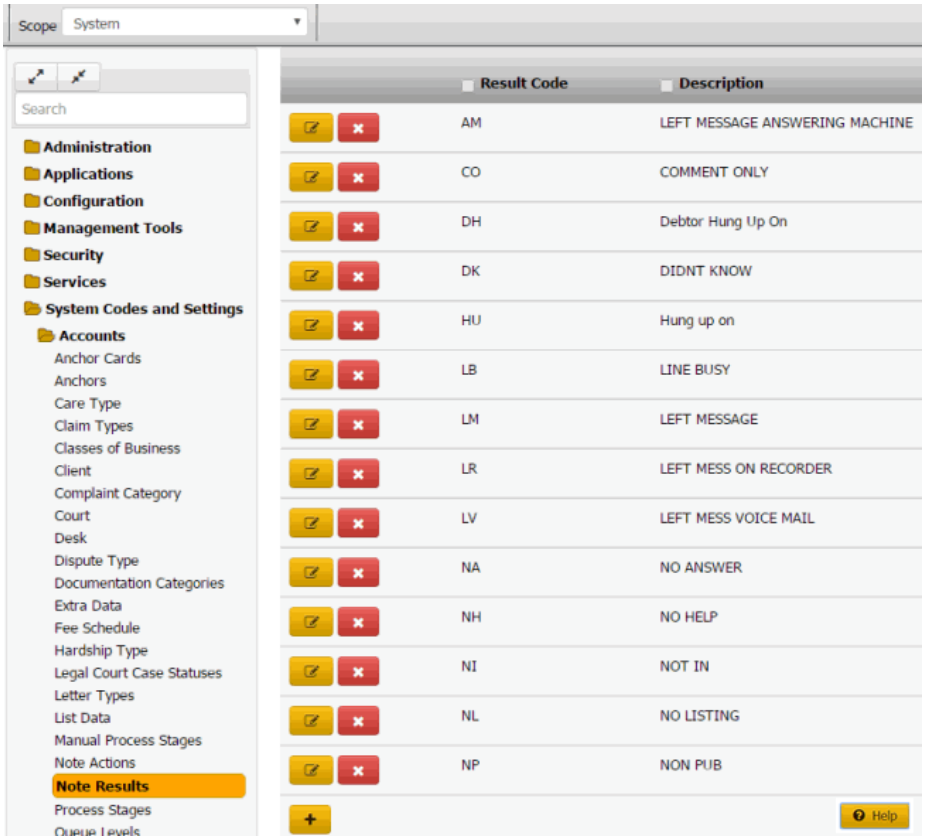
Feedback

Modify a Note Result Code

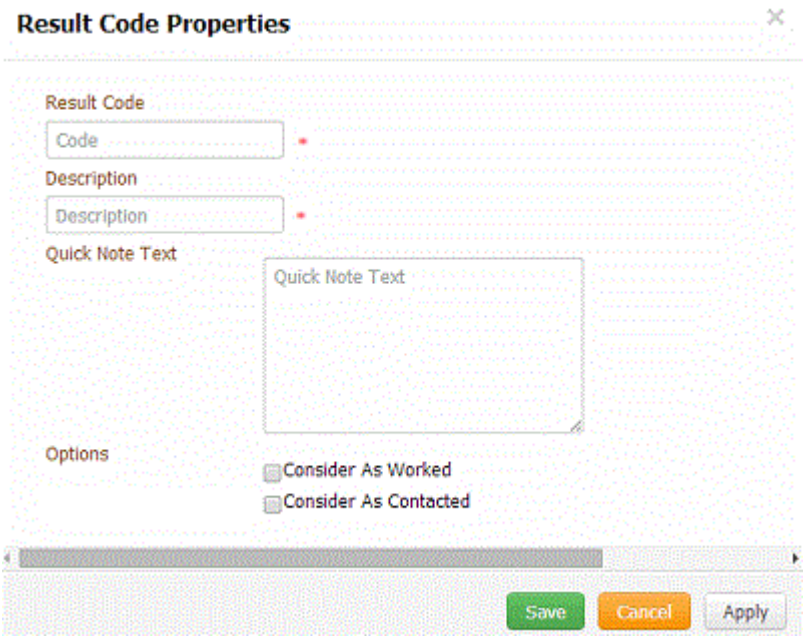
Use the **Result Code Properties** dialog box to modify a result code.

To modify a result code

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Note Results**.



2. Click the Edit icon. The **Result Code Properties** dialog box appears.



Result Code: Unique (up to) five-character code that identifies an event.

Description: Description of the result code.

Quick Note Text: Default information to appear in the note. When users create a note using this result code, they can modify the quick note text.

Consider As Worked: If selected, the result code signifies a worked account.

Consider As Contacted: If selected, the result code signifies a contacted account.

3. Modify the information and then click **Save**.

Related Topics

Search for a Permission or System Code

Data Grids

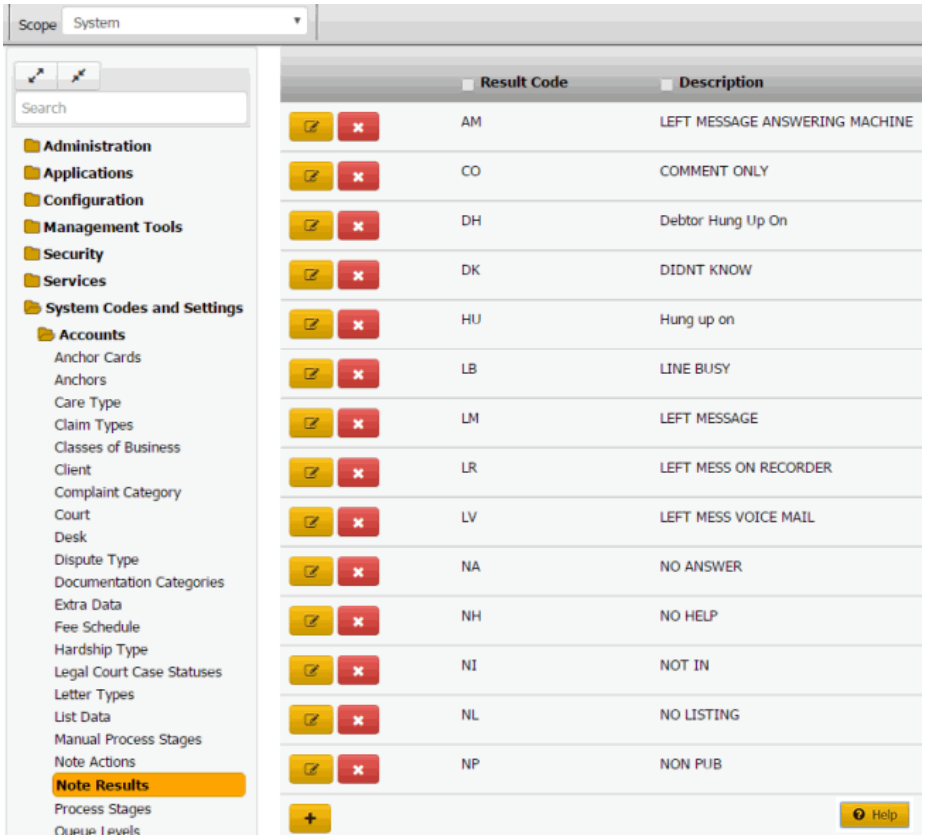
Note Result Codes

Delete a Note Result Code

Use the **Note Results** panel to delete a result code.

To delete a result code

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Note Results**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Search for a Permission or System Code

Data Grids

Note Result Codes

Process Stages

Feedback

Process Stages

You can add, modify, and delete processes and their stages. For more information, see Processes and Stages.

Related Topics

Add a Process

Modify a Process

Delete a Process

Add a Stage to a Process

Modify a Process Stage

Delete a Process Stage

Search for a Permission or System Code

Account Codes

Processes and Stages

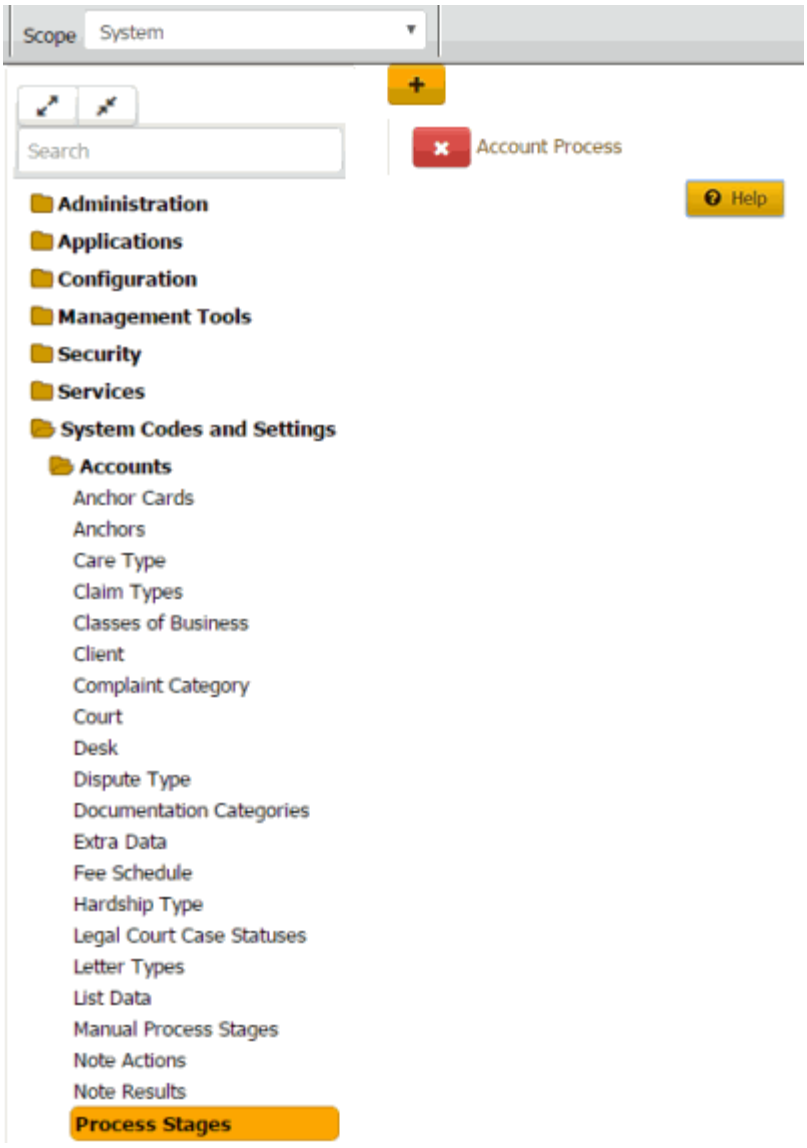
Feedback

Add a Process

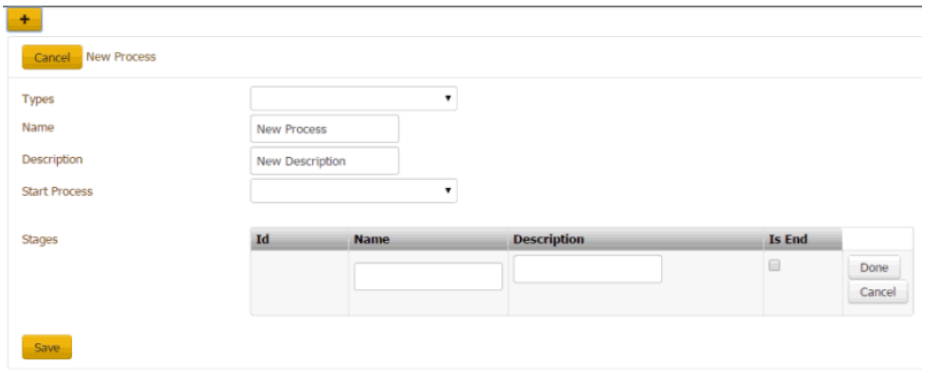
Use the **Process Stages** panel to add a process.

To add a process

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Process Stages**.



2. Click the plus sign (+). The panel appears in add mode.



Types: Type of process.

Name: Name of process.

Description: Description of process.

Start Process: Stage at which to start the process.

Stages

ID: Code that the system assigns to identify the stage.

Name: Name of the stage.

Description: Description of the stage.

Is End: If selected, this stage is the last stage in the process.

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

Note: For information about adding a stage to the process, see Add a Stage to a Process.

Related Topics

Search for a Permission or System Code

Process Stages

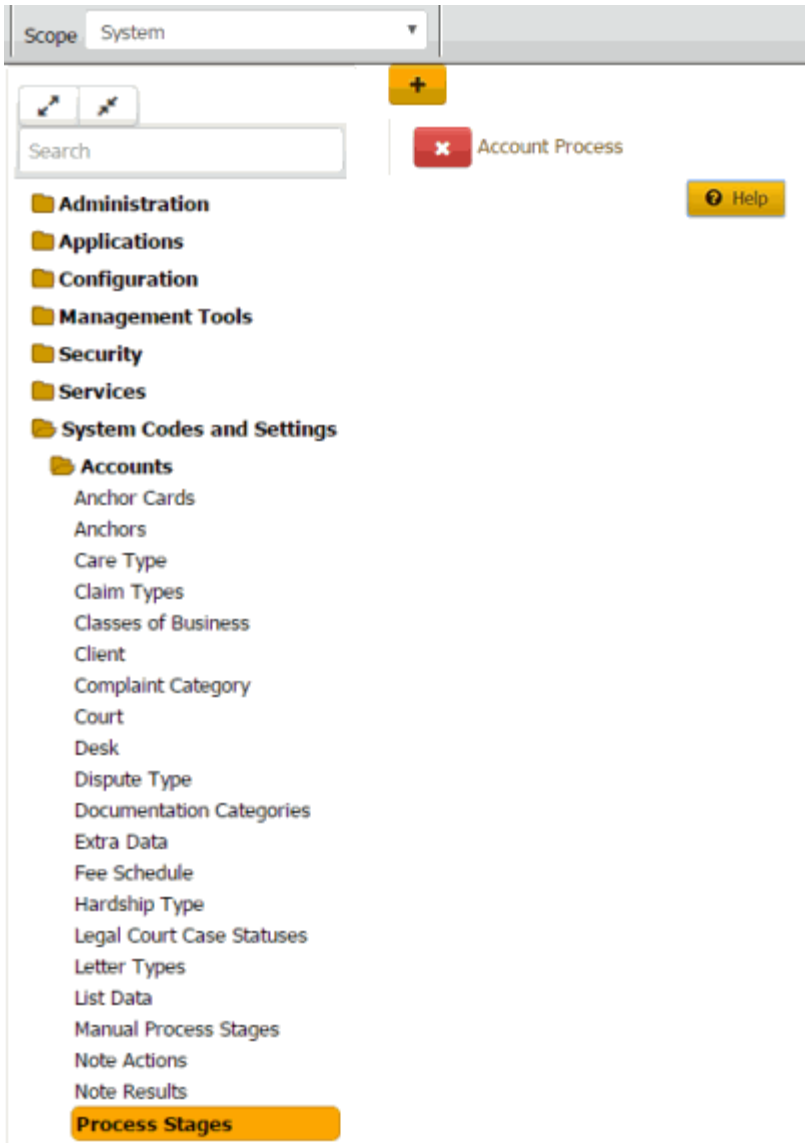
Feedback

Modify a Process

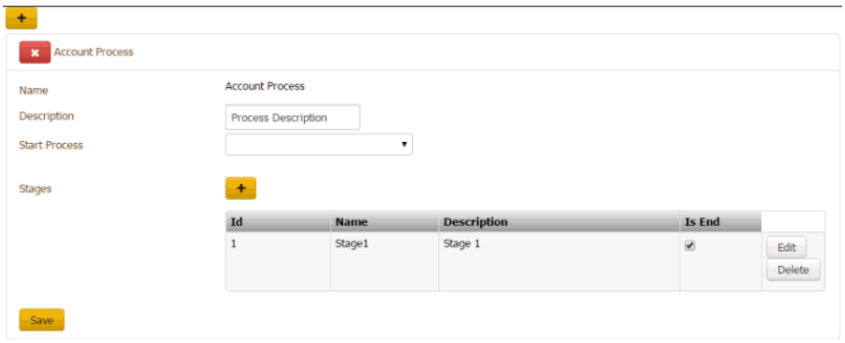
Use the **Process Stages** panel to modify a process.

To modify a process

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Process Stages**.



2. Click the process to modify. The process expands.



Name: Name of process.

Description: Description of process.

Start Process: Stage at which to start the process.

Stages

ID: Code that the system assigns to identify the stage.

Name: Name of the stage.

Description: Description of the stage.

Is End: If selected, this stage is the last stage in the process.

3. Modify the information and then click **Save**.

Note: For information about adding or modifying a stage, see Add a Stage to a Process.

Related Topics

Search for a Permission or System Code

Process Stages

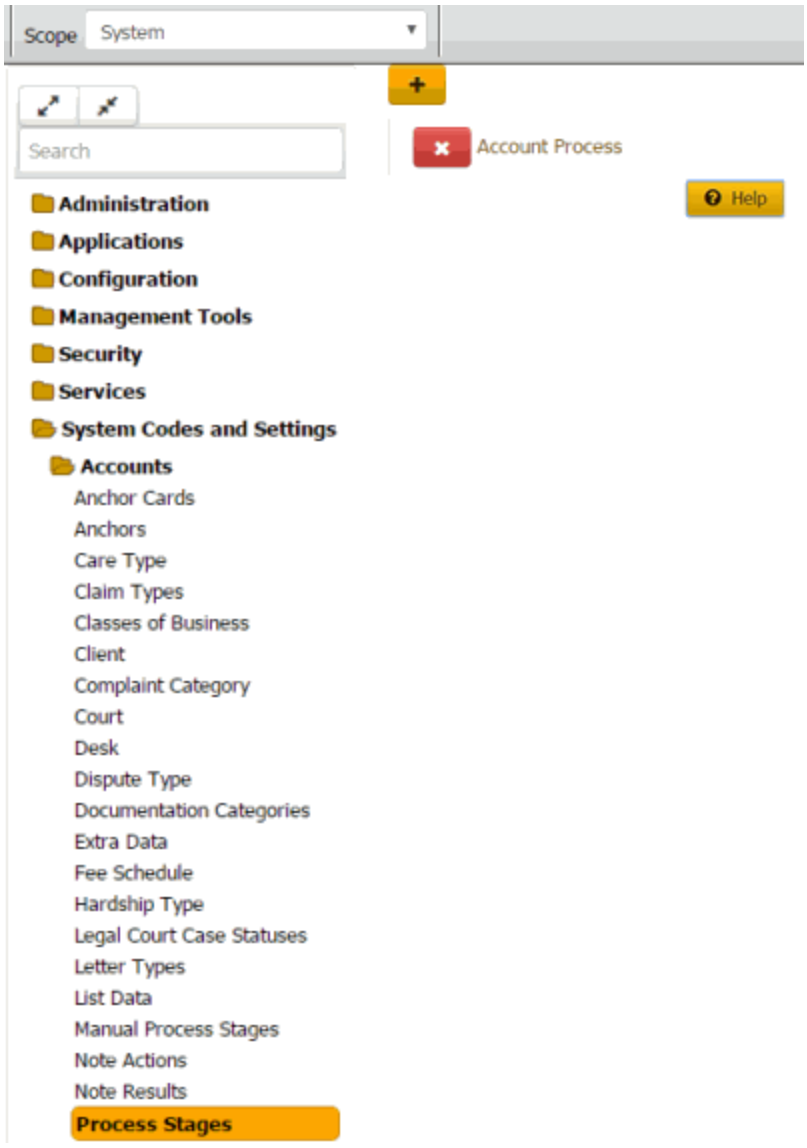
Feedback

Delete a Process

Use the **Process Stages** panel to delete a process.

To delete a process

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Process Stages**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Search for a Permission or System Code

Process Stages

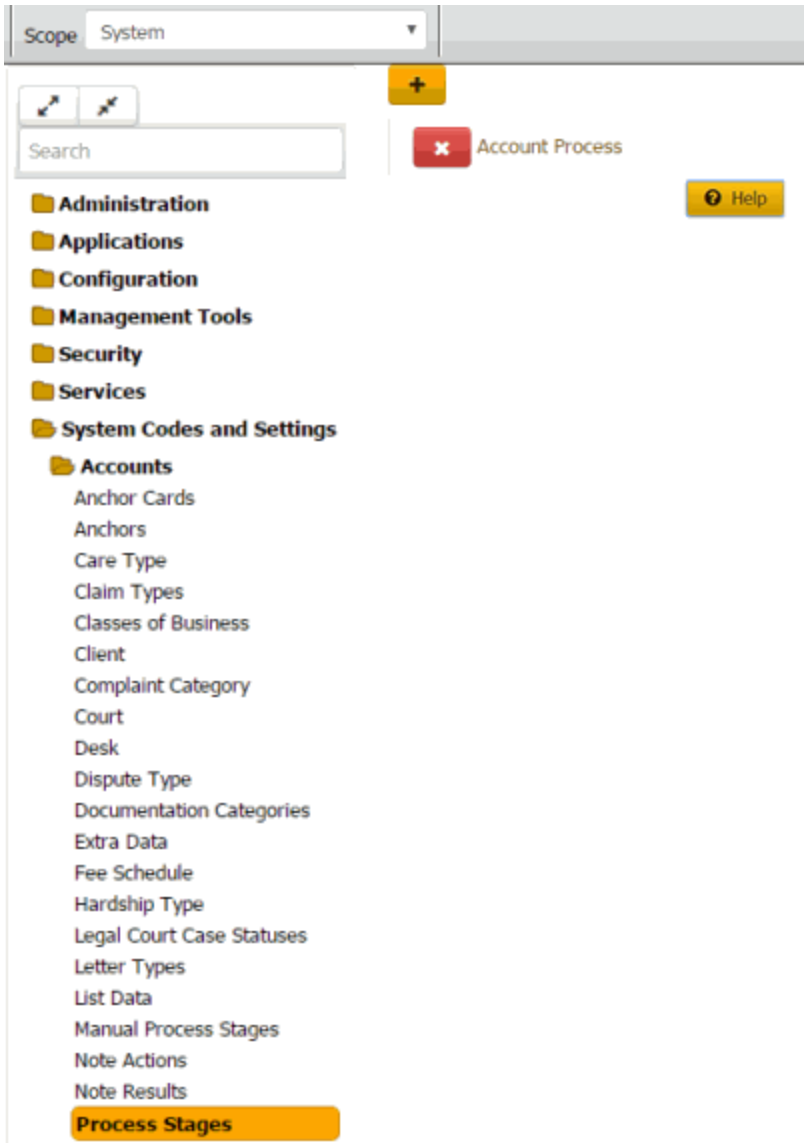
Feedback

Add a Stage to a Process

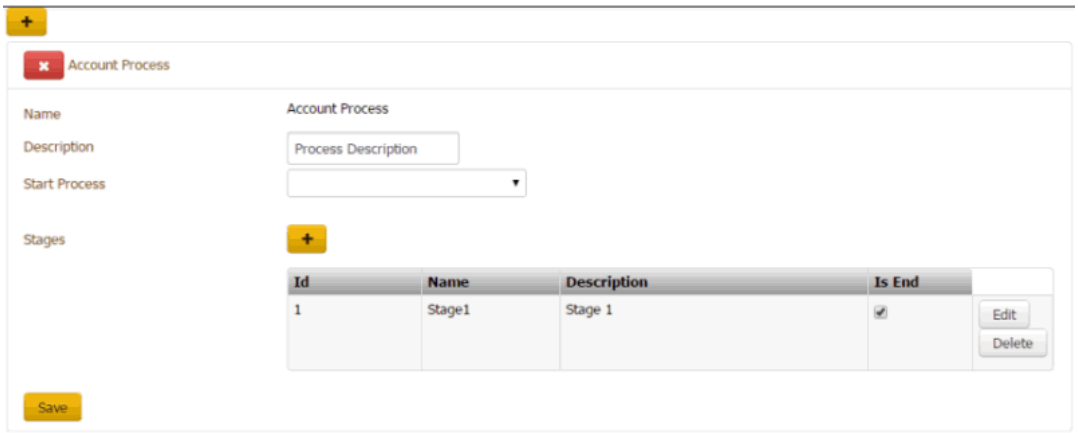
Use the **Process Stages** panel to add a stage to a process.

To add a stage to a process

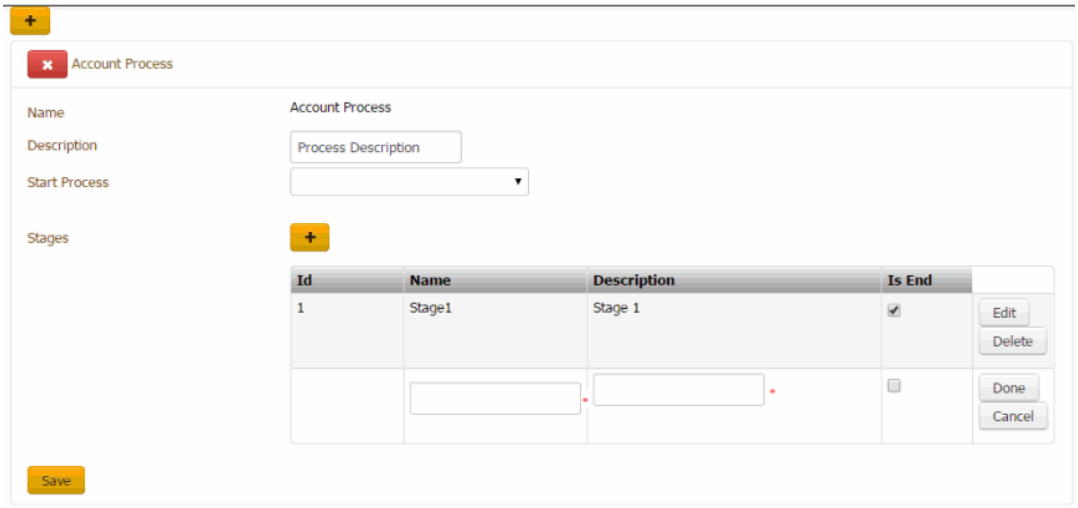
1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Process Stages**.



2. Click the process to which to add a stage. The process expands.



3. Next to **Stages**, click the plus sign (+). A blank row appears in the data grid.



ID: Code that the system assigns to identify the stage.

Name: Name of the stage.

Description: Description of the stage.

Is End: If selected, this stage is the last stage in the process.

4. Complete the information and then click **Done**.
5. To modify a stage, click **Edit**, complete the information, and then click **Done**.
6. Click **Save**.

Related Topics

Search for a Permission or System Code

Process Stages

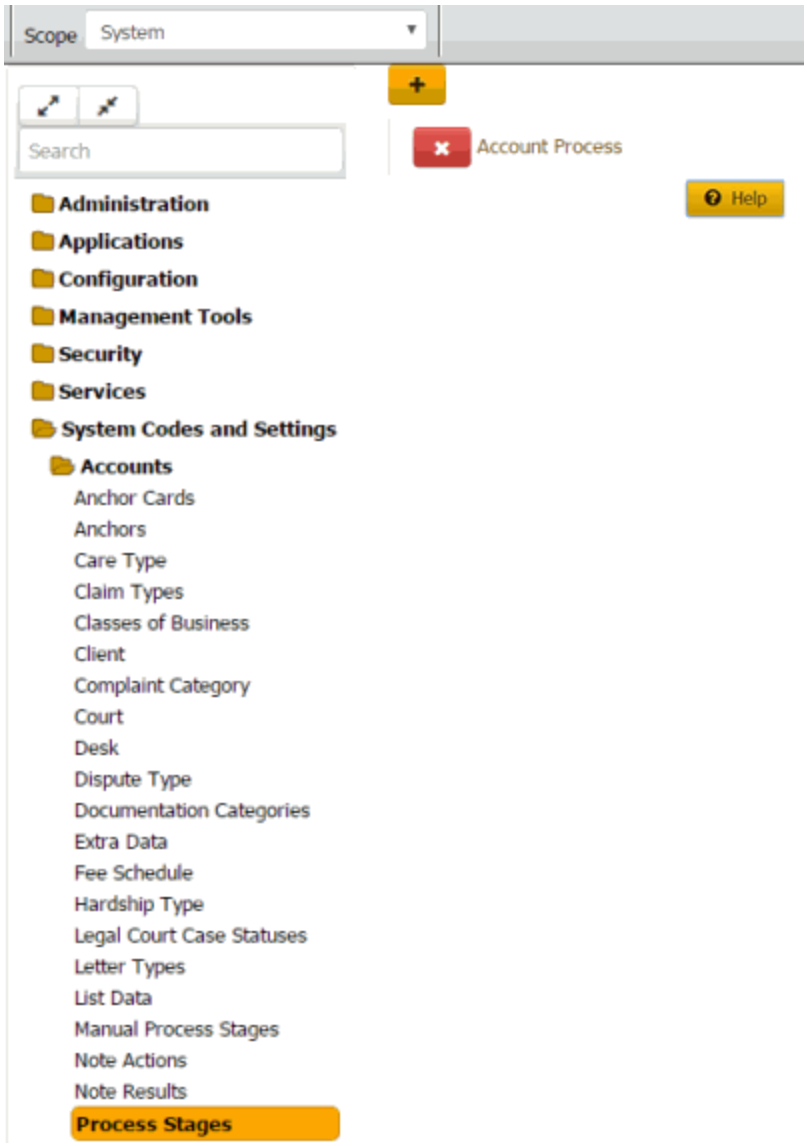
Feedback

Modify a Process Stage

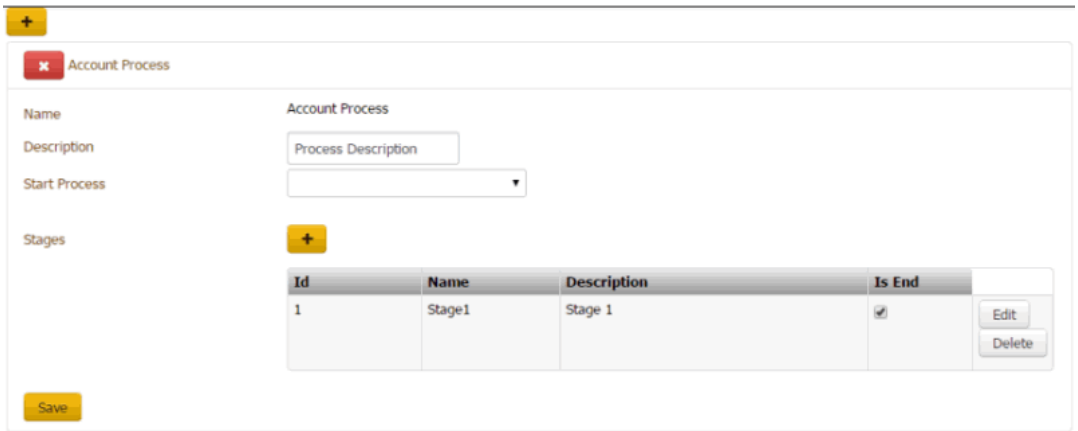
Use the **Process Stages** panel to modify a process stage.

To modify a process stage

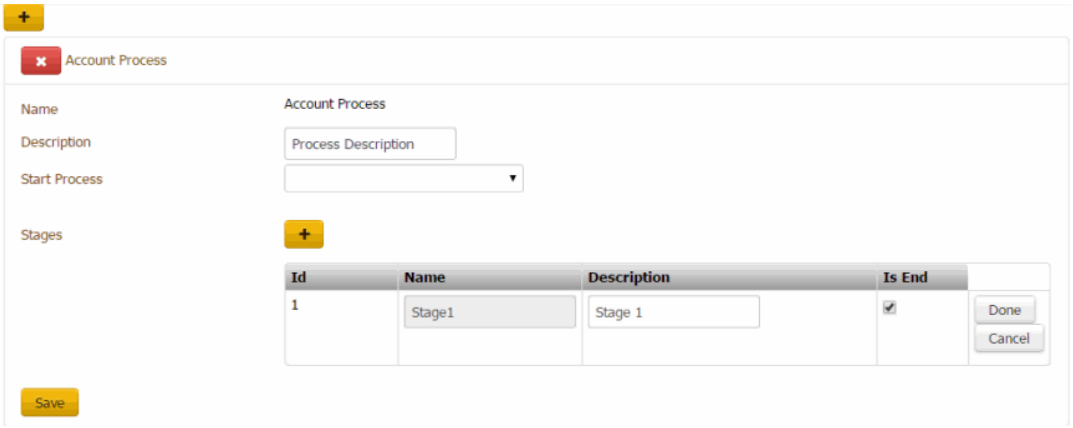
1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Process Stages**.



2. Click the process for which to modify a stage. The process expands.



3. In the data grid, click **Edit**. The data grid appears in edit mode.



ID: Code that the system assigns to identify the stage.

Name: Name of the stage.

Description: Description of the stage.

Is End: If selected, this stage is the last stage in the process.

4. Modify the information and then click **Done**.
5. Click **Save**.

Related Topics

Search for a Permission or System Code

Process Stages

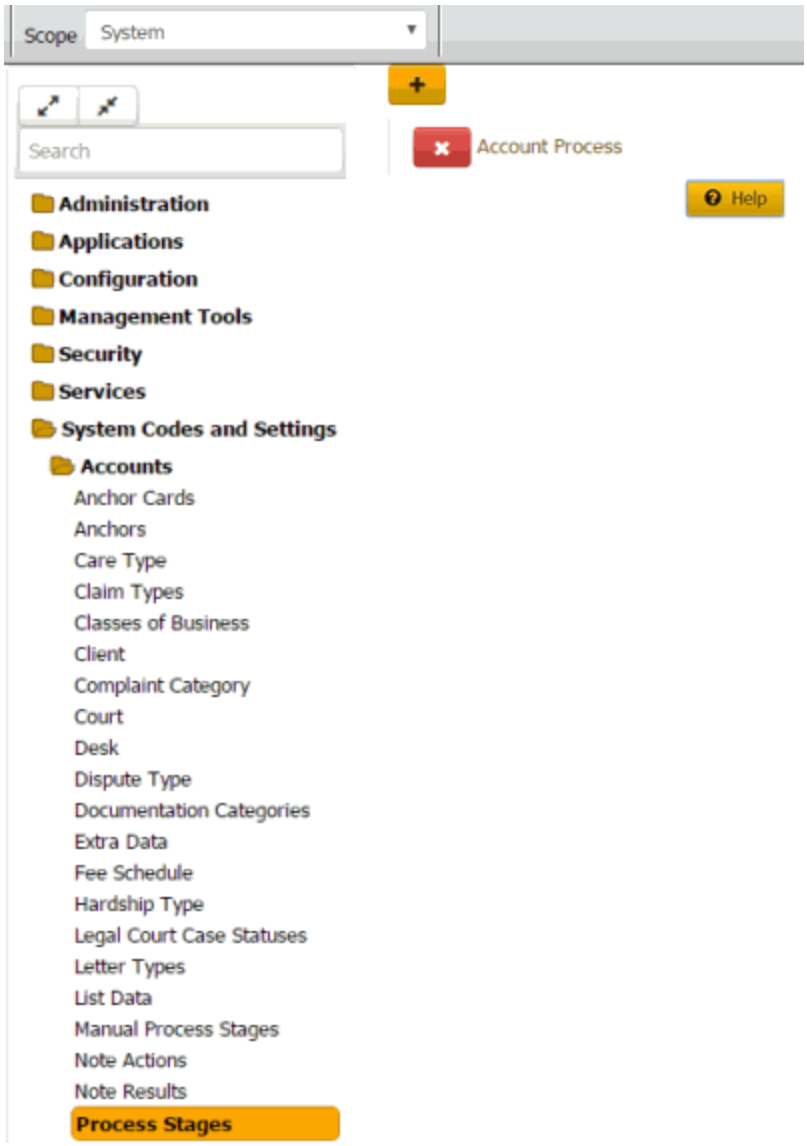
Feedback

Delete a Process Stage

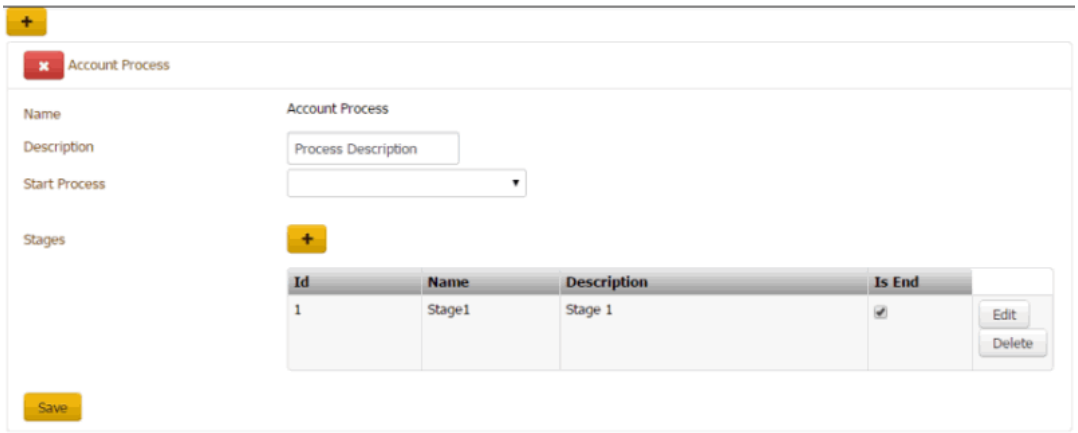
Use the **Process Stages** panel to delete a process stage.

To delete a process stage

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Process Stages**.



2. Click the process from which to delete a stage. The process expands.



3. In the data grid, click **Delete** and then click **OK**.

Related Topics

Search for a Permission or System Code

Process Stages

Queue Levels

Feedback

Queue Levels

Queue levels manage workflow to ensure the most efficient routing and working of accounts. Every account in Latitude has a queue level. Queue levels change based on account activity or condition. Queue logic doesn't force a queue level change when business logic prevents it. For example, when a user creates a promise payment arrangement on the account, Latitude assigns queue level 820 (future promise). When the credit bureau returns a requested credit report for the account. The queue level remains at 820 instead of changing to 200 (returned with credit report) because the business logic has priority.

Queue level code management

Users with the System Codes and Settings Permission can add, modify, and delete queue level codes. The system reserves queue levels 425-499, 600-699, and 700-799 to allow you to create queues for accounts that require special attention. Though allowed, we don't recommend the following actions without consulting with Latitude by Genesys Support:

- Modifying the descriptions for system- and user-defined queue levels.
- Modifying the "should queue" setting for system- and user-defined queue levels.
- Deleting system- and user-defined queue levels.

Queue level assignment

Automated queue level assignment is based on account activity and condition. When certain events occur or conditions exist on an account, Latitude or Custodian changes the queue level accordingly. For example, when a user sets a follow-up date on an account or a supervisor dismisses an account from the Supervisor queue. Users can move accounts manually to Custom, Clerical, or Supervisor queues. For a list of queue levels and their description, see Queue Level Codes.

Latitude updates some account queue levels immediately while others update during Custodian processing. Your organization can change the queue levels on accounts as needed using Custodian, WorkFlow, Job Manager, Exchange, or an SSIS package. For more information about Custodian; WorkFlow; Job Manager; or Exchange, see the corresponding documentation. If you need assistance, contact Latitude by Genesys Support.

Work queues

There are four work queues in Latitude that are available based on your permissions. Each queue contains accounts assigned to a specific queue level. For more information about working accounts in queues, see Work Queues.

- **Collector queue:** Contains accounts assigned to a queue level that is less than 599.
- **Custom queue:** Contains accounts assigned to queue levels 425-499 that require a specific type of work (for example, skip tracing).
- **Clerical queue:** Contains accounts assigned to queue levels 600-699 that require clerical support (for example, verification of a direct payment).
- **Supervisor queue:** Contains accounts assigned to queue levels 700-799 that require supervisor support (for example, approval of a payment arrangement).

Queue level issues and challenges

Queue levels present certain issues and challenges. For example:

- **Workflow:** Some queue levels determine the workflow priority for presenting accounts to users in work queues. The smaller the queue level number, the higher the priority for working those accounts.
- **Work queues:** Some queue levels identify a group of accounts that require special processing, after-hours work, clerical support, or supervisor support.
- **Immediate assignment:** Latitude assigns accounts to queue levels immediately based on account activities and conditions.
- **Nightly assignment:** Custodian assigns accounts to queue levels during nightly processing when accounts qualify.
- **Planned assignment:** Your organization can change queue level assignments at any time using Custodian, WorkFlow, Job Manager, Exchange, or an SSIS package.
- **User-defined assignment:** Users can assign accounts to user-defined queue levels that define the Custom, Clerical, and Supervisor queues.

Related Topics

Add a Queue Level

Modify a Queue Level

Delete a Queue Level

Queue Level Codes

Work Queues

Search for a Permission or System Code

Data Grids

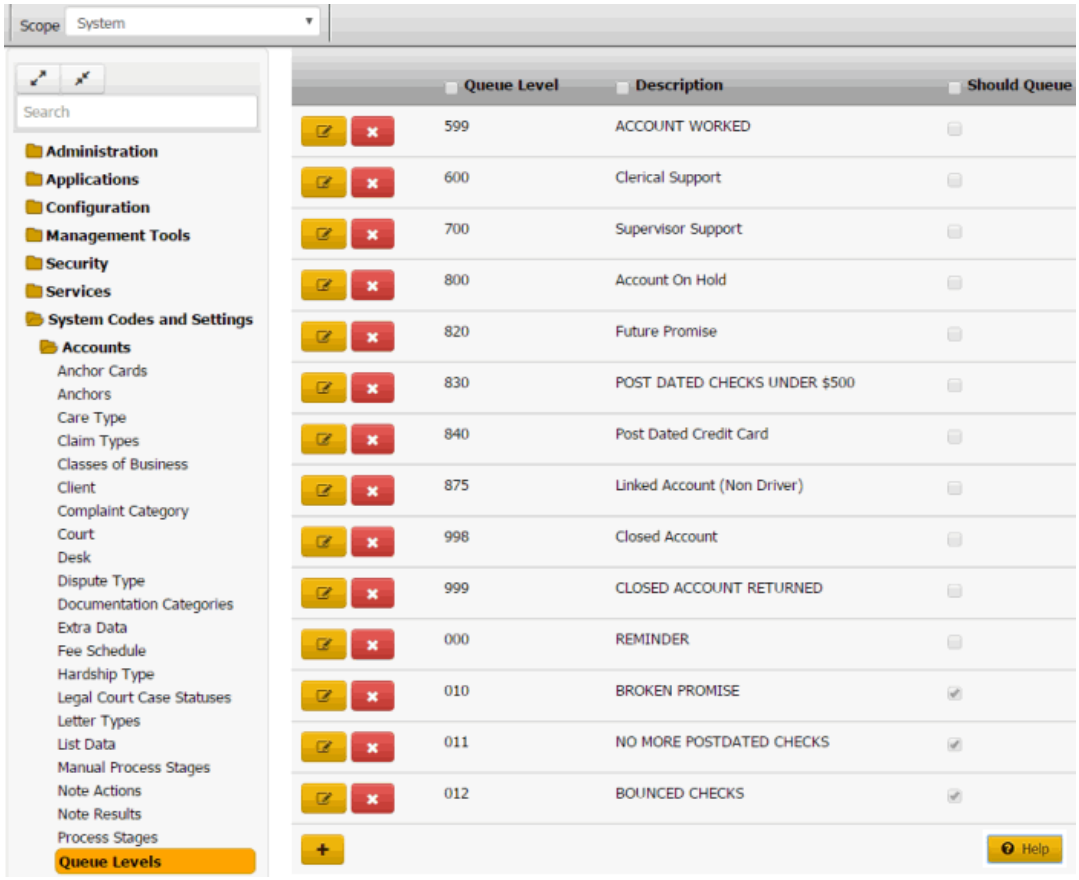
Account Codes

Add a Queue Level

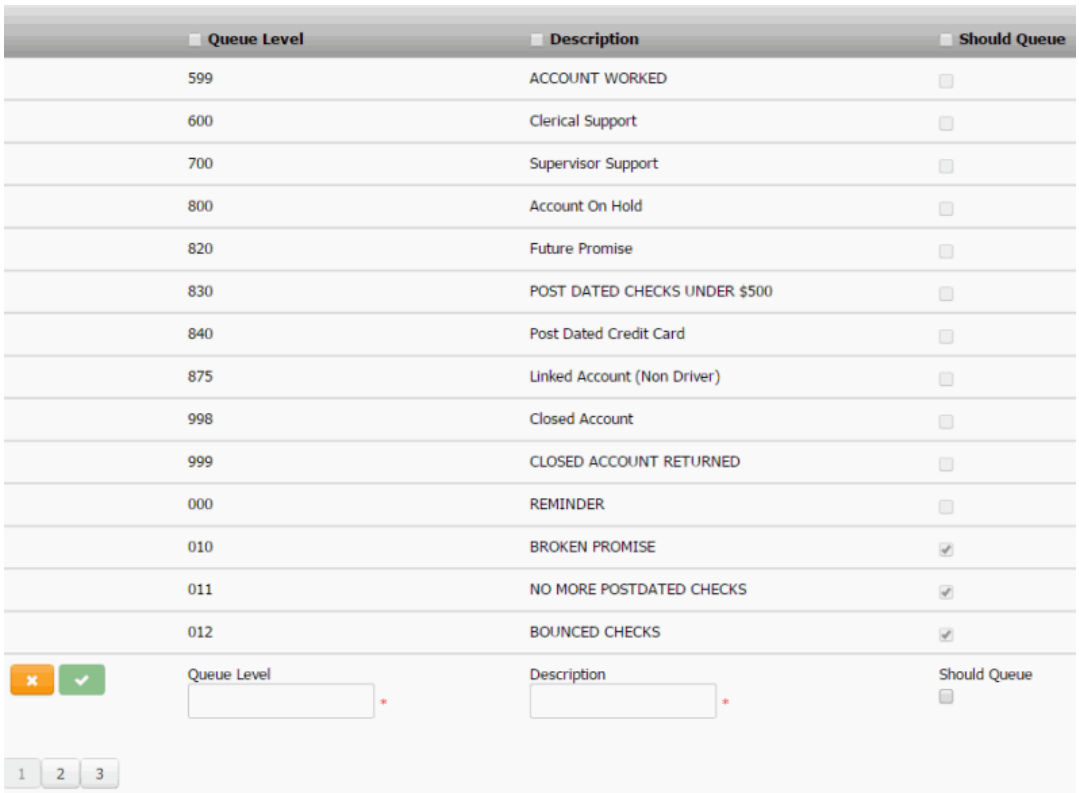
Use the **Queue Levels** panel to add a queue level.

To add a queue level

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Queue Levels**.



2. Click the plus sign (+). A blank row appears in the data grid.



Queue Level	Description	Should Queue
599	ACCOUNT WORKED	☐
600	Clerical Support	☐
700	Supervisor Support	☐
800	Account On Hold	☐
820	Future Promise	☐
830	POST DATED CHECKS UNDER $500	☐
840	Post Dated Credit Card	☐
875	Linked Account (Non Driver)	☐
998	Closed Account	☐
999	CLOSED ACCOUNT RETURNED	☐
000	REMINDER	☐
010	BROKEN PROMISE	☑
011	NO MORE POSTDATED CHECKS	☑
012	BOUNCED CHECKS	☑
✖ ✔	Queue Level *	Description *

1 2 3

Queue Level: Unique three-digit code that identifies the queue level.

Description: Description of the queue.

Should queue: If selected and the queue level is between 600-799 (clerical or supervisor), accounts assigned to this queue appear in the users' queue. If the user has the **Accounts – Change Continue Queuing** permission, you can override this setting when assigning an account to a support queue.

3. Complete the information and then click the check mark.

Related Topics

Search for a Permission or System Code

Data Grids

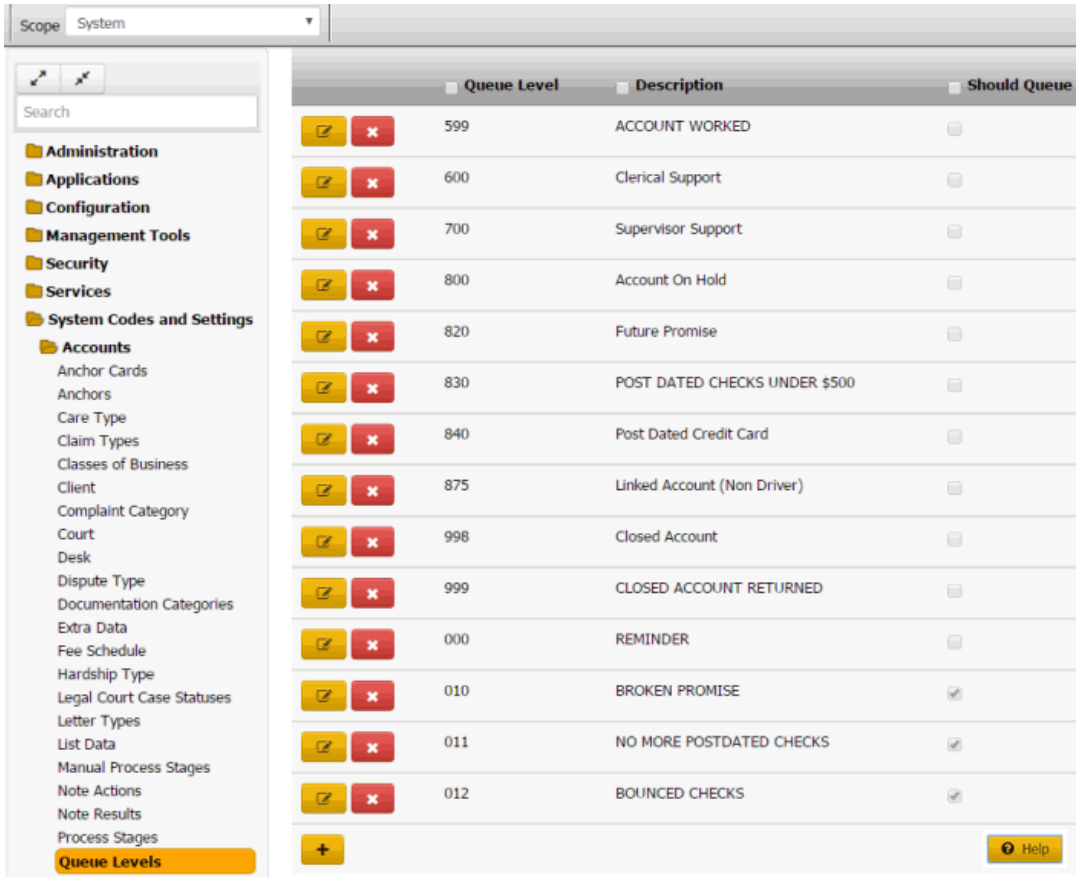
Queue Levels

Modify a Queue Level

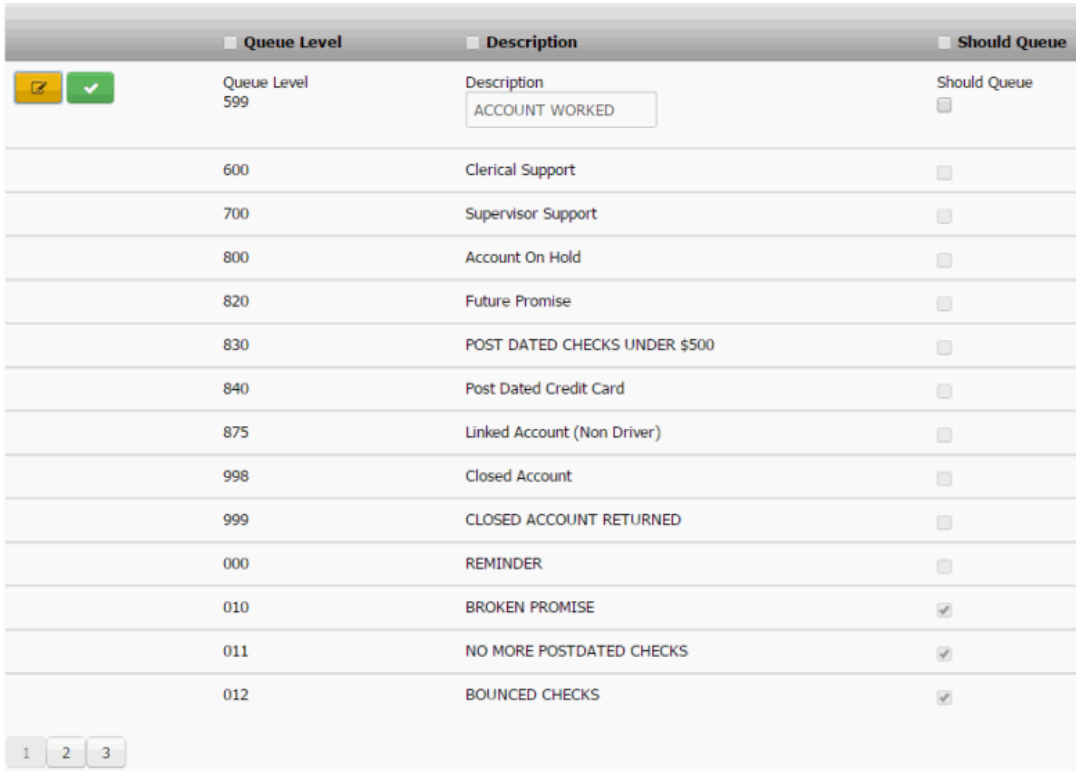
Use the **Queue Levels** panel to modify a queue level.

To modify a queue level

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Queue Levels**.



2. Click the Edit icon. The queue level appears in edit mode.



Queue Level: Unique three-digit code that identifies the queue level.

Description: Description of the queue.

Should queue: If selected, accounts assigned to this queue appear in work queues. If the user has the **Accounts – Change Continue Queuing** permission, you can override this setting when assigning an account to a support queue.

3. Modify the information and then click the check mark.

Note: For system-level queues, you cannot modify the code.

Related Topics

Search for a Permission or System Code

Data Grids

Queue Levels

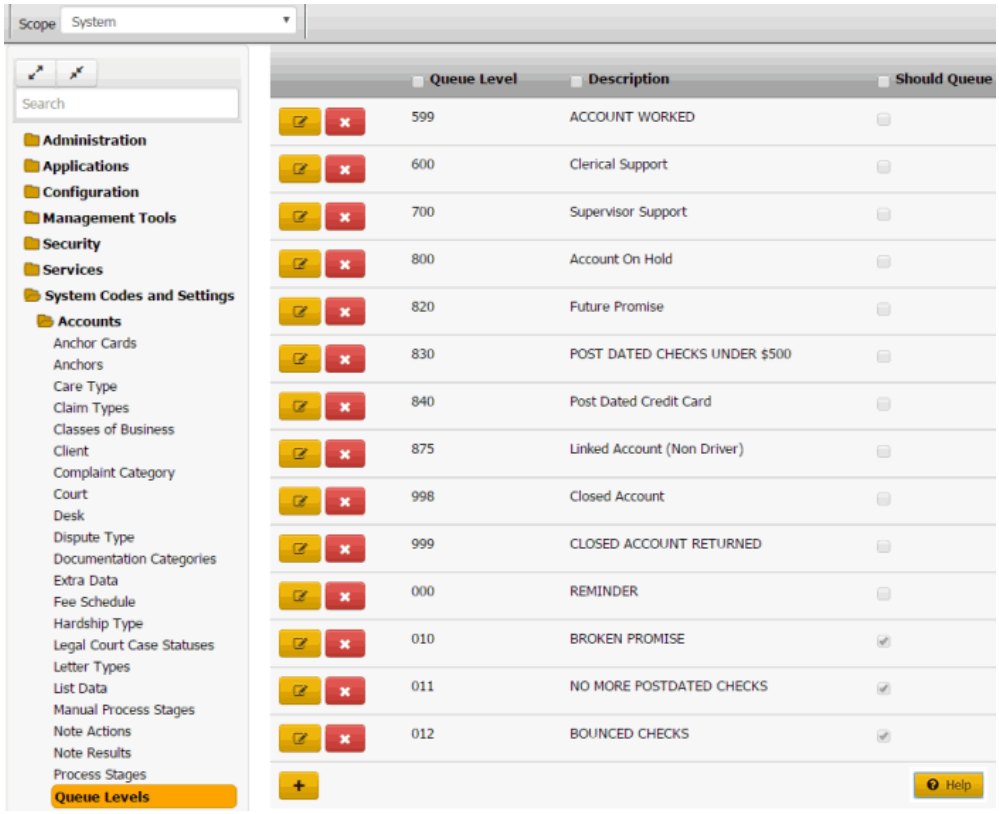
Feedback

Delete a Queue Level

Use the **Queue Levels** panel to delete a queue level code.

To delete a queue level

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Queue Levels**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Search for a Permission or System Code

Data Grids

Queue Levels

Feedback

Queue Level Codes

Latitude releases with several queue level codes, as described in the following table. Most queue levels represent events or conditions that trigger a queue level change. The queue levels flagged with an asterisk (*) in the following table represent repositories for accounts that require special attention.

Note: The names associated to the queue levels may differ, depending on how you or Latitude by Genesys configured your system. The remaining information applies regardless of the queue level name.

Queue Level	Name	Assignment	Queues for Work?	Reassignment
000	Reminder	Latitude assigns this queue level when a user creates a reminder or follow-up on an account. **Note:** If an account has a reminder set, the reminder appears for the desk at the designated date and time. If an account has a follow-up set, the account displays on the designated day when a user attempts to move to the next account in a work queue.	No	For a follow-up, when a user works the account, Latitude reassigns the account to the queue level that applies based on account activity or condition. For a reminder, when a user dismisses the reminder, Latitude reassigns the account to the queue level that applies based on account activity or condition. **Note:** If a user doesn't dismiss a reminder, accounts can remain at this queue level indefinitely. To avoid or correct this issue, do one of the following: • At the desk level, set the maximum number of days ahead that a user can set a reminder. After the number of days pass and a user hasn't dismissed the reminder, Custodian reassigns the account to the previous queue level. • Use a Custodian task to identify accounts assigned to queue level 000 for more than a specific number of days. Set the task to force dismissal of the reminders and reassign the accounts to the previous queue level.

				• Use the Account Analysis tool to identify accounts assigned to queue level 000. When users work these accounts, Latitude or Custodian reassigns the accounts to the queue level that applies based on account activity or condition.
010	Broken Promise	Custodian assigns this queue level when an account has a promise arrangement due on the current day but no payment posted to the account. Custodian places future payments on hold. **Note:** If a grace period exists for the account, Custodian delays assigning this queue level and placing payments on hold until the grace period expires without a payment posting on the account.	Yes	After a user receives a payment or negotiates a new payment arrangement, Custodian reassigns the account to the queue level that applies based on account activity or condition. Custodian also removes the hold on future payments.
011	No More Postdated Checks	Custodian assigns this queue level when an account completes a post-dated payment arrangement successfully but a balance remains on the account.	Yes	After a user negotiates a new payment arrangement or otherwise works the account, Custodian reassigns the account to the queue level that applies based on account activity or condition.
012	Bounced Checks	Custodian assigns this queue level when an account has a payment reversal because the check bounced and there are no future payments in the arrangement.	Yes	After a user receives payment or negotiates a new payment arrangement, Custodian reassigns the account to the queue level that applies based on account activity or condition.
013	No More Promises	Custodian assigns this queue level when an account completes a promise payment arrangement successfully but a balance remains on the account.	Yes	After a user negotiates a new payment arrangement, Custodian reassigns the account to the queue level that applies based on account activity or condition.
015	New Accounts	Custodian assigns this queue level when you import a new account into Latitude that is either not a linked account or is the link driver. If the new account is not the link driver, Custodian assigns the account to queue level 875.	Yes	If a user accesses but doesn't work the account, Custodian reassigns the account to queue level 016. If a user accesses and works the account, Custodian reassigns the account to queue level 599.
016	NewBiz Followup	Custodian assigns this queue level when a user accesses but doesn't work a new account that is either not a linked account or is the link driver.	Yes	After a user works the account the same day or the set number of days allowed, Custodian reassigns the account to the queue level that applies based on the account activity or condition.

				Note: If your organization configured the desk to allow users to work a new account for a specific number of days, the account remains at this queue level until that time passes.
018	PDC over $500	Latitude assigns this queue level when an account has a post-dated check or ACH payment arrangement with payments that are $500 or more each.	Yes	After a user contacts the customer regarding the upcoming deduction of funds, Custodian reassigns the account to the queue level that applies based on the account activity or condition.
019	NSF With PDCs	Custodian assigns this queue level when an account has a payment reversal because the check bounced and there are future payments in the payment arrangement. Custodian places the future payments on hold.	Yes	After a user receives a payment or renegotiates the payment arrangement, Custodian reassigns the account to the queue level that applies based on account activity or condition. Custodian also removes the hold on future payments.
020	Accounts 0 - 30 Days Old	Custodian assigns this queue level when an account has been in Latitude less than 31 days since the date received.	Yes	If a user works the account before 30 days pass, Custodian reassigns the account to the queue level that applies based on account activity or condition. If 30 days pass and a user hasn't worked the account, Custodian reassigns the account to queue level 030.
025	Accounts W Payment	No longer in use.	N/A	N/A
030	Accounts 30 – 60 Days Old	Custodian assigns this queue level when an account has been in Latitude between 30 and 60 days since the date received.	Yes	If a user works the account before 60 days pass, Custodian reassigns the account to the queue level that applies based on account activity or condition. If 60 days pass and a user hasn't worked the account, Custodian reassigns the account to queue level 060.
060	Accounts 60 – 90 Days Old	Custodian assigns this queue level when an account has been in Latitude between 60 and 90 days since the date received.	Yes	If a user works the account before 90 days pass, Custodian reassigns the account to the queue level that applies based on account activity or condition. If 90 days pass and a user hasn't worked the account, Custodian reassigns the account to queue level 090.
090	Accounts 90 – 120 Days Old	Custodian assigns this queue level when an account has been in Latitude between 90 and 120 days since the date received.	Yes	If a user works the account before 120 days pass, Custodian reassigns the account to the queue level that applies based on account activity or condition.

				If 120 days pass and a user hasn't worked the account, Custodian reassigns the account to queue level 120.
100	Account Reassigned	Custodian assigns this queue level when an account that is not new business moves from one desk to another.	Yes	After a user works the account, Custodian reassigns the account to the queue level that applies based on account activity or condition.
120	Over 120 Days Old	Custodian assigns this queue level when an account has been in Latitude for more than 120 days since the date received.	Yes	After a user works the account, Custodian reassigns the account to the queue level that applies based on account activity or condition.
200	Returned With Credit Report	Latitude assigns this queue level when a user receives a requested credit report and adds it to an account.	Yes	After a user updates the account to reflect the information in the credit report, Custodian reassigns the account to the queue level that applies based on account activity or condition.
400*	Late Night Queue (1)	Users assign this queue level initially when an account requires after-hours follow-up. Custodian assigns this queue level when an account reaches queue level 403 without a user working it.	Yes	If a user works the account on the current day, Custodian reassigns the account to the queue level that applies based on account activity or condition. If a user doesn't work the account on the current day, Custodian reassigns the account to queue level 401.
401*	Late Night Queue (2)	Custodian assigns this queue level when a user didn't work an account while it was at queue level 400.	Yes	If a user works the account on the current day, Custodian reassigns the account to the queue level that applies based on account activity or condition. If a user doesn't work the account on the current day, Custodian reassigns the account to queue level 402.
402*	Late Night Queue (3)	Custodian assigns this queue level when a user didn't work an account while it was at queue level 401.	Yes	If a user works the account on the current day, Custodian reassigns the account to the queue level that applies based on account activity or condition. If a user doesn't work the account on the current day, Custodian reassigns the account to queue level 403.
403*	Late Night Queue (4)	Custodian assigns this queue level when a user didn't work an account while it was at queue level 402.	Yes	If a user works the account on the current day, Custodian reassigns the account to the queue level that applies based on account activity or condition. If a user doesn't work the account on the current day, Custodian assigns the account to queue level 400.

425-499*	Custom Queue Levels	Users can assign accounts to Custom queues. Custom queues are work queues that your organization can create to hold accounts that require special follow-up work (for example, skip tracing; probate activity, bankruptcy). For more information, see Queue Levels.	Yes	After a user removes an account from a Custom queue, Custodian reassigns the account to the queue level that applies based on account activity or condition.
599	Account Worked	Latitude assigns this queue level when a user works an account on the current day.	No	Accounts remain at this queue level until the end of the day to ensure compliance with Federal and State collection laws. Custodian reassigns the account to the queue level that applies based on account activity or condition.
600-699*	Clerical Support	Users and Latitude can assign accounts to Clerical queues. For example, when a user requests a letter for an account and the user doesn't have permissions to print letters, Latitude assigns the account to a Clerical queue. Clerical queues are work queues that your organization can create to hold accounts that require clerical support (for example, direct payment verification with a customer). For more information, see Queue Levels.	Yes	After a user removes an account from a Clerical queue, Custodian reassigns the account to the queue level that applies based on account activity or condition.
700-799*	Supervisor Support	Users and Latitude can assign accounts to Supervisor queues. For example, when a user creates a payment arrangement on an account but doesn't have permissions to approve payment arrangements, Latitude assigns the account to a Supervisor queue. Supervisor queues are work queues that organization can create to hold accounts that require supervisor action (for example, payment arrangement approval). For more information, see Queue Levels.	Yes	After a user removes an account from a Supervisor queue, Custodian reassigns the account to the queue level that applies based on account activity or condition.
800	Account on Hold	Latitude assigns this queue level when an account has a customer-level or account-level hold.	No	After a user or Latitude removes the hold on the account, Custodian reassigns the account to the queue level that applies based on account activity or condition.

820	Future Promise	Latitude assigns this queue level when an account has a new promise payment arrangement.	No	When Custodian identifies a broken or complete payment arrangement, Custodian reassigns the account to the queue level that applies based on account activity or condition.
830	Post-dated Checks Under $500	Latitude assigns this queue level when an account has a post-dated check or ACH payment arrangement with payments that are less than $500 each.	No	When Custodian identifies a broken or complete payment arrangement, Custodian reassigns the account to the queue level that applies based on account activity or condition.
840	Post-dated Credit Card	Latitude assigns this queue level when an account has a post-dated credit card payment arrangement with payments that are less than $500 each.	No	When Custodian identifies a broken or complete payment arrangement, Custodian reassigns the account to the queue level that applies based on account activity or condition.
875	Linked Account (Non Driver)	Custodian assigns this queue level when an account is a linked account but isn't the link driver account. Users work these accounts when the link driver account queues for work.	No	If Custodian identifies the account as closed, Custodian reassigns the account to queue level 998. If Custodian identifies the account as closed and returned, Custodian reassigns the account to queue level 999.
998	Closed Account	Latitude assigns this queue level when an account has a closed status.	No	If Custodian identifies the account as closed and returned, Custodian reassigns the account to queue level 999.
999	Closed Account Returned	Latitude assigns this queue level when an account has a closed and returned status.	No	If a user reopens the account, Custodian reassigns the account to the queue level that applies based on account activity or condition.

Related Topics

Queue Levels

Responsible Party Codes

Feedback

Responsible Party Codes

You can search for, add, modify, and delete responsible party codes that represent the relation of a party to an account (for example, co-debtor). Your organization can set up an unlimited number of responsible party codes, and record separate demographic information for each party associated to an account. Users specify a responsible party code when adding a party to an account. For more information, see Add a Party to an Account.

Related Topics

Add a Responsible Party Code

Modify a Responsible Party Code

Delete a Responsible Party Code

Search for a Permission or System Code

Data Grids

Account Codes

Add a Party to an Account

Maintain Contact Information

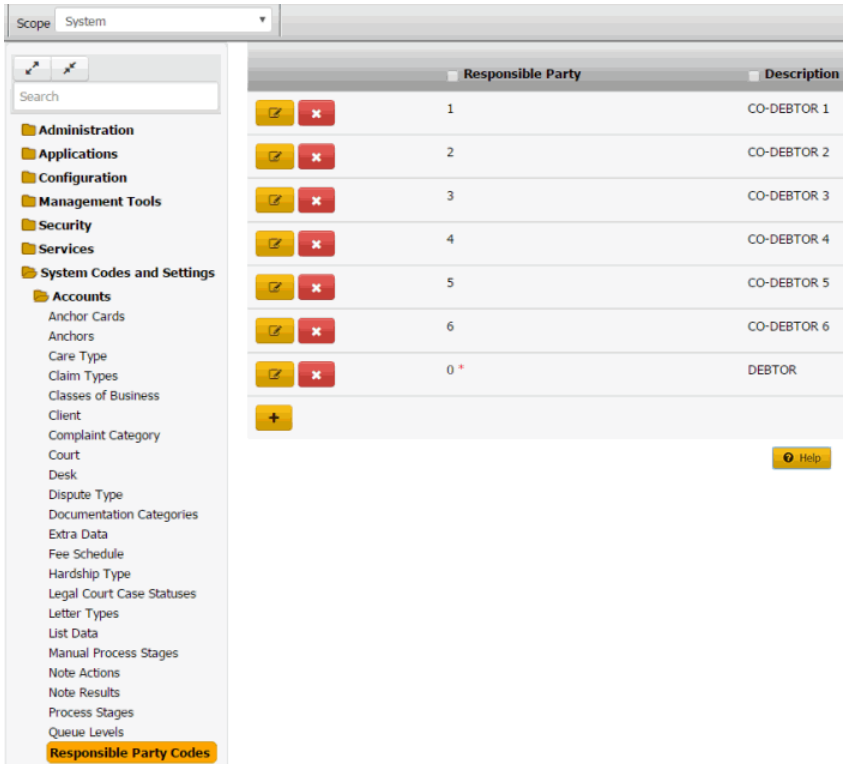
Feedback

Add a Responsible Party Code

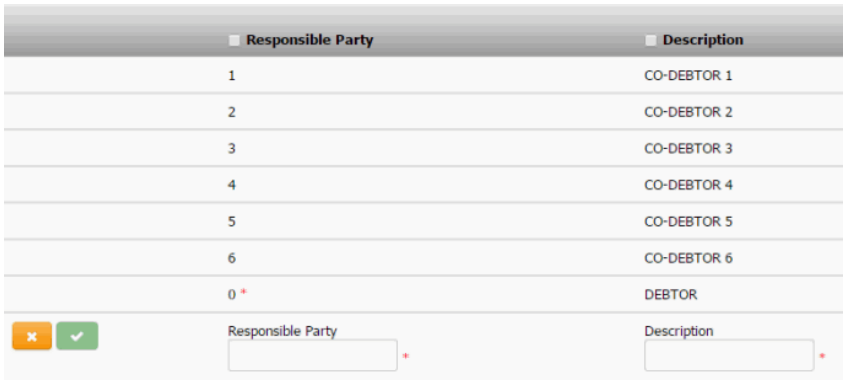
Use the **Responsible Party Codes** panel to add a responsible party code.

To add a responsible party code

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Responsible Party Codes**.



2. Click the plus sign (+). A blank row appears in the data grid.



3. In the **Code** box, type a unique code for the responsible party code.
4. In the **Description** box, type a description of the responsible party code.
5. Click the check mark.

Related Topics

[Search for a Permission or System Code]

[Data Grids]

[Responsible Party Codes]

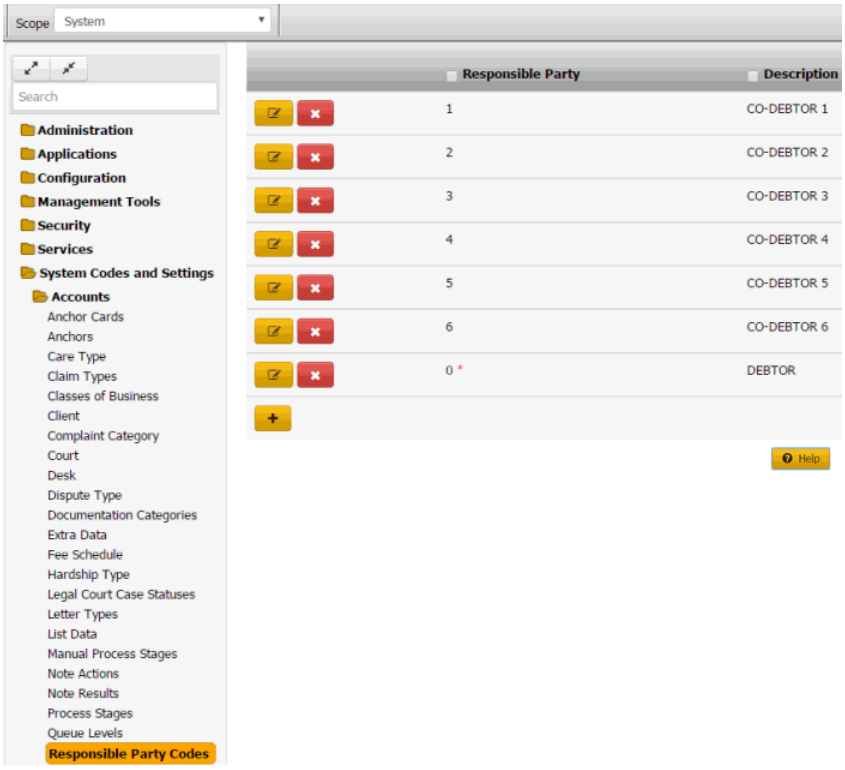
Feedback

Modify a Responsible Party Code

Use the **Responsible Party Codes** panel to modify a responsible party code.

To modify a responsible party code

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Responsible Party Codes**.



2. Click the Edit icon. The responsible party code appears in edit mode.

3. Modify the information and then click the check mark.

Related Topics

[Search for a Permission or System Code]

[Data Grids]

[Responsible Party Codes]

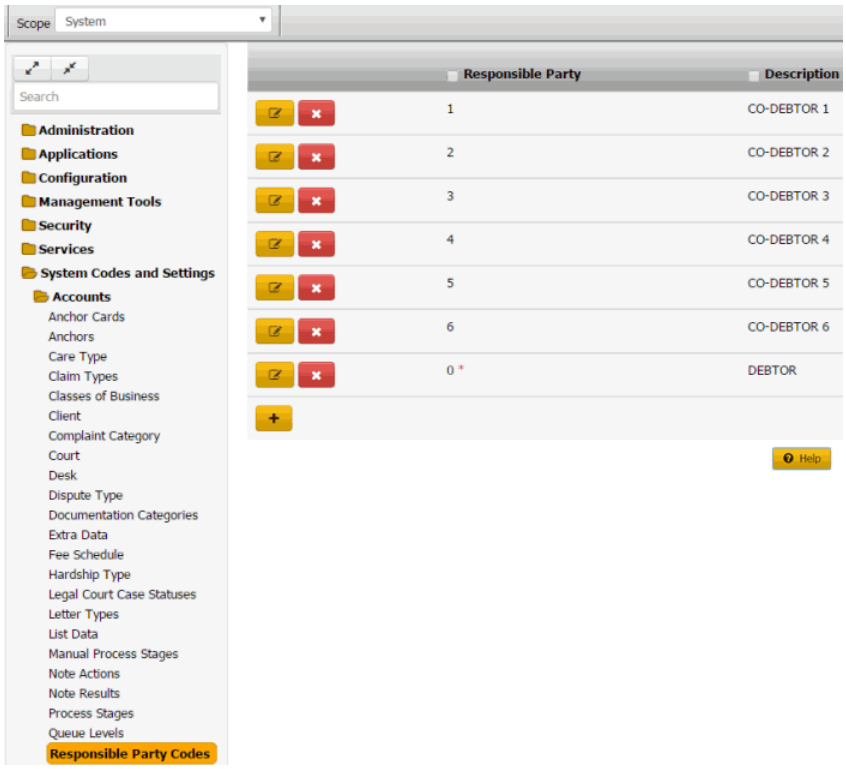
Feedback

Delete a Responsible Party Code

Use the **Responsible Party Codes** panel to delete a responsible party code.

To delete a responsible party code

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Responsible Party Codes**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Search for a Permission or System Code

Data Grids

Responsible Party Codes

Status Codes

Feedback

Status Codes

You can search for, add, modify, and delete status codes. Status codes represent the state of an account and whether it is active or closed. Latitude releases with several standard status codes.

Related Topics

Add a Status Code

Modify a Status Code

Delete a Status Code

Search for a Permission or System Code

Data Grids

Account Codes

Change an Account Status

Select a Quick-pick Account Status

Standard Status Codes

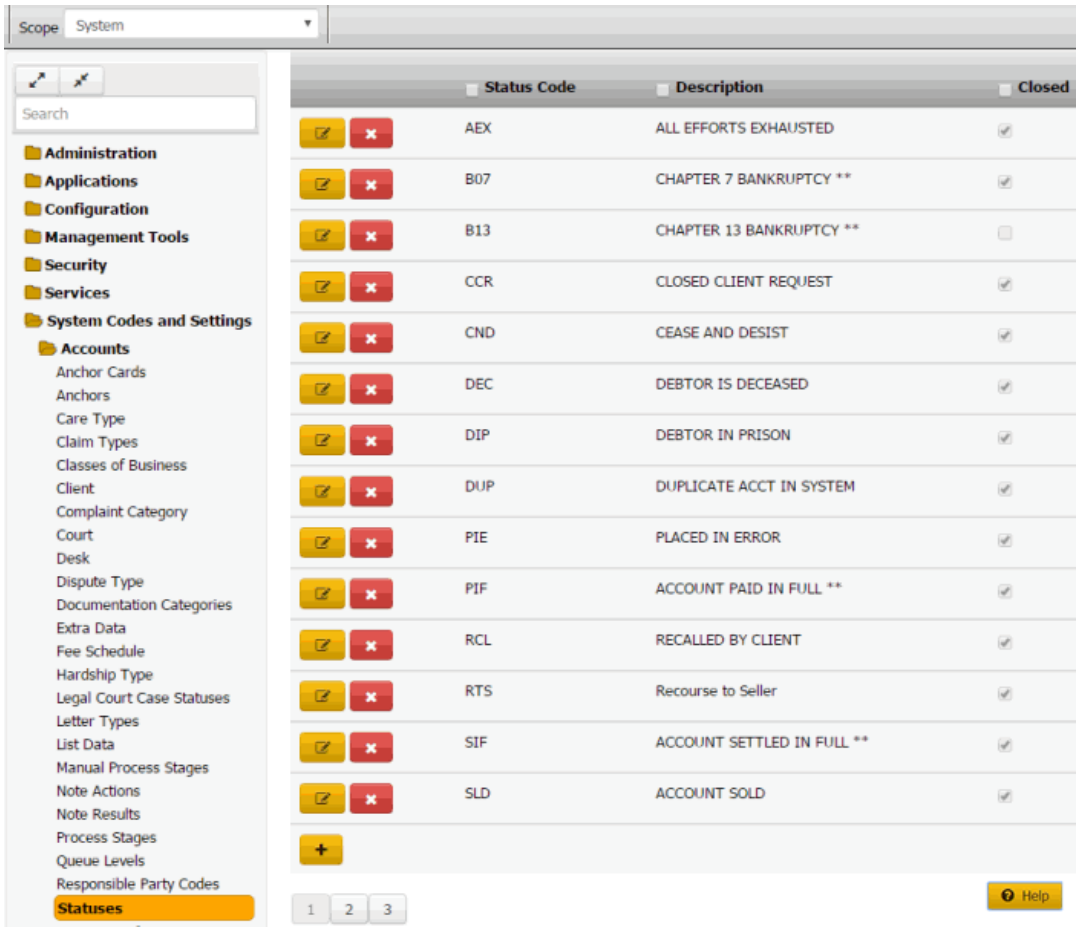
Feedback

Add a Status Code

Use the **Status** dialog box to add a status code.

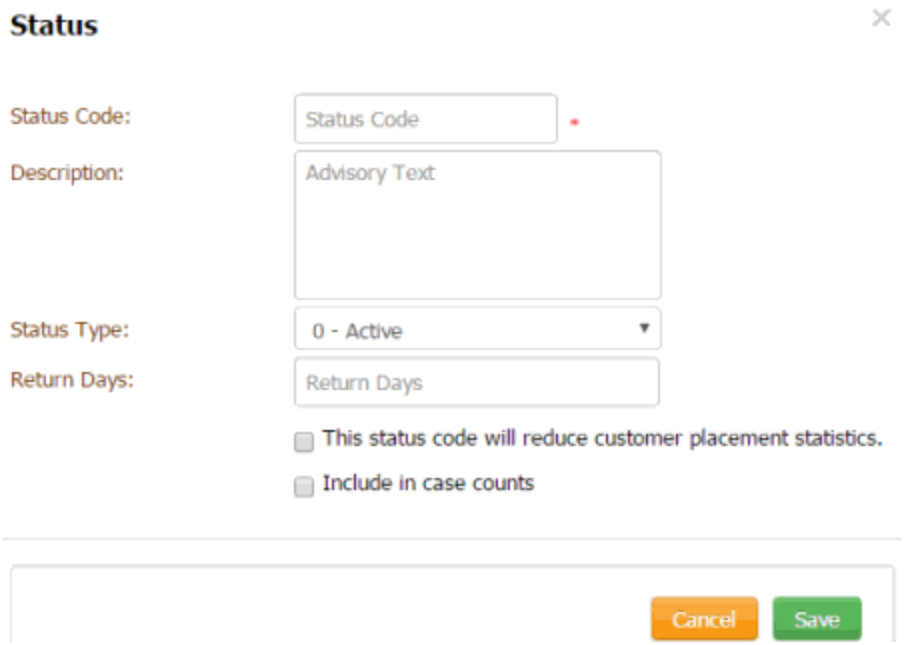
To add a status code

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Statuses**.



1.

2. Click the plus sign (+). The **Status** dialog box appears.



Status Code: Unique code that identifies the status.

Description: Description of the status.

Status Type: Type of status that the status code applies to, such as active or closed. Accounts with a closed status type code don't appear in work queues.

Return Days: Number of days to hold an account assigned to this status before returning the account to the customer.

This status code will reduce customer placement statistics: If selected, Latitude excludes accounts assigned to this status code from customer account placement statistics.

Include in case counts: If selected, the Desk Mover program includes accounts in this status when determining whether the case count exceeds the case limit set for the desk.

Note: To configure credit bureau reporting options for a status code, use Credit Bureau Reporting Console. For more information, see the *Credit Bureau Reporting Console* documentation.

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

Related Topics

Search for a Permission or System Code

Data Grids

Status Codes

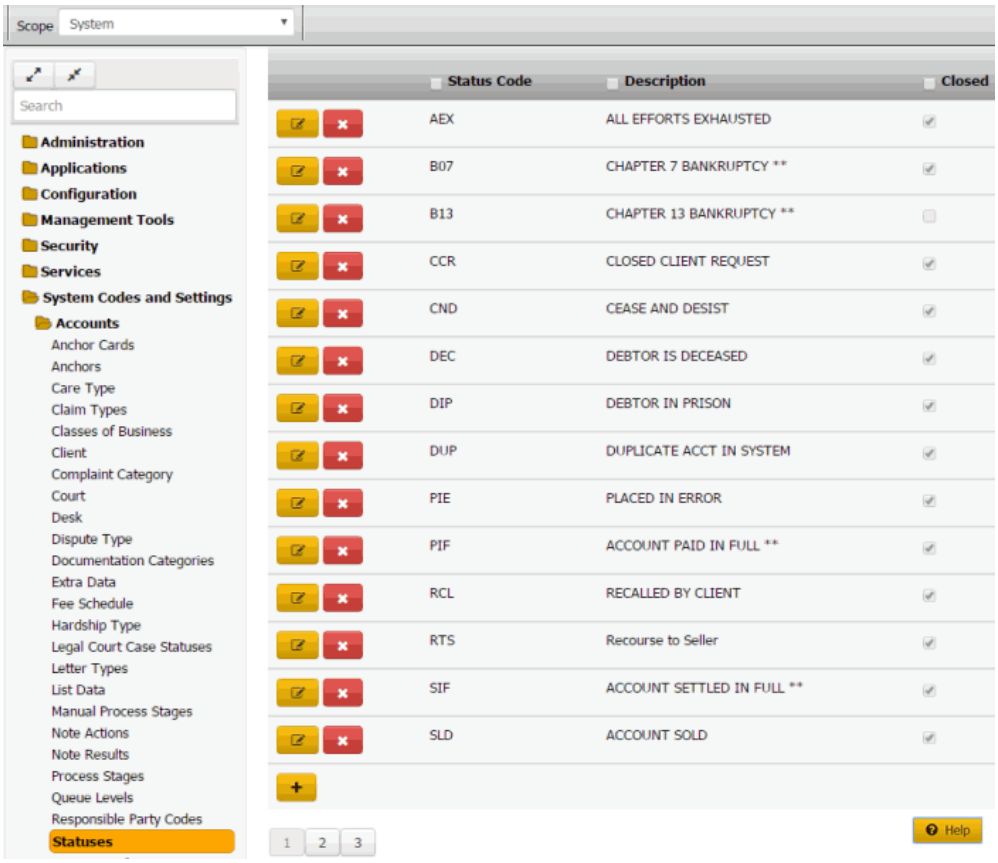
Feedback

Modify a Status Code

Use the **Status** dialog box to modify a status code.

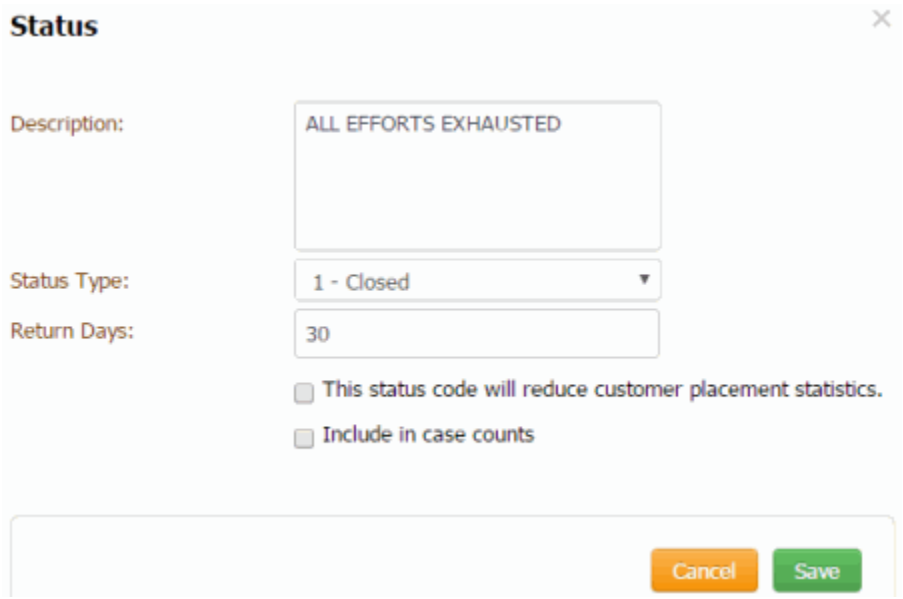
To modify a status code

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Statuses**.



1.

2. Click the Edit icon. The status code appears in edit mode.



Description: Description of the status.

Status Type: Type of status that the status code applies to, such as active or closed. Accounts with a closed status type code don't appear in work queues.

Return Days: Number of days to hold an account assigned to this status before returning the account to the customer.

This status code will reduce customer placement statistics: If selected, Latitude excludes accounts assigned to this status code from customer account placement statistics.

Include in case counts: If selected, the Desk Mover program includes accounts in this status when determining whether the case count exceeds the case limit set for the desk.

Note: To configure credit bureau reporting options for a status code, use Credit Bureau Reporting Console. For more information, see the *Credit Bureau Reporting Console* documentation.

3. Modify the information and then click **Save**.

Related Topics

Search for a Permission or System Code

Data Grids

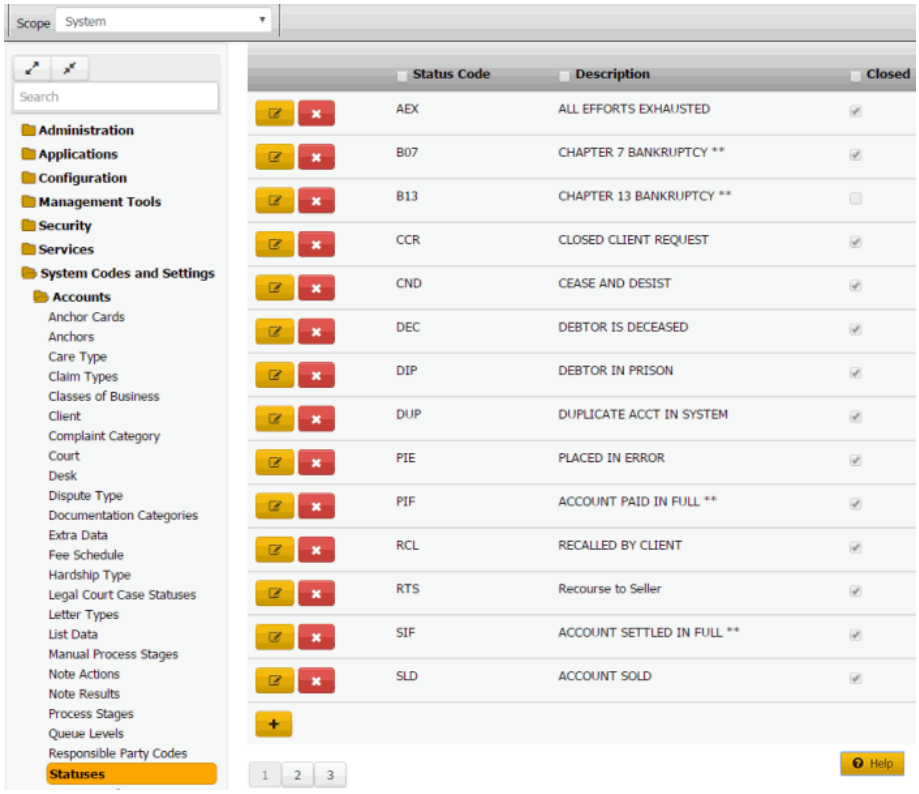
Status Codes

Delete a Status Code

Use the **Statuses** panel to delete a status code.

To delete a status code

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Statuses**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Search for a Permission or System Code

Data Grids

Status Codes

System Configuration

System Configuration

You can view and maintain settings for your organization that apply globally across Latitude. These settings include company information, money titles, letter defaults, system settings, account titles, client titles, file paths, and miscellaneous settings. You must have the System Configuration Permission to modify the settings.

Related Topics

Maintain Company Information

Maintain Money Titles

Maintain Letter Defaults

Maintain System Settings

Maintain Account Titles

Client Titles

Maintain Miscellaneous Settings

System Configuration Permission

Search for a Permission or System Code

System Administration

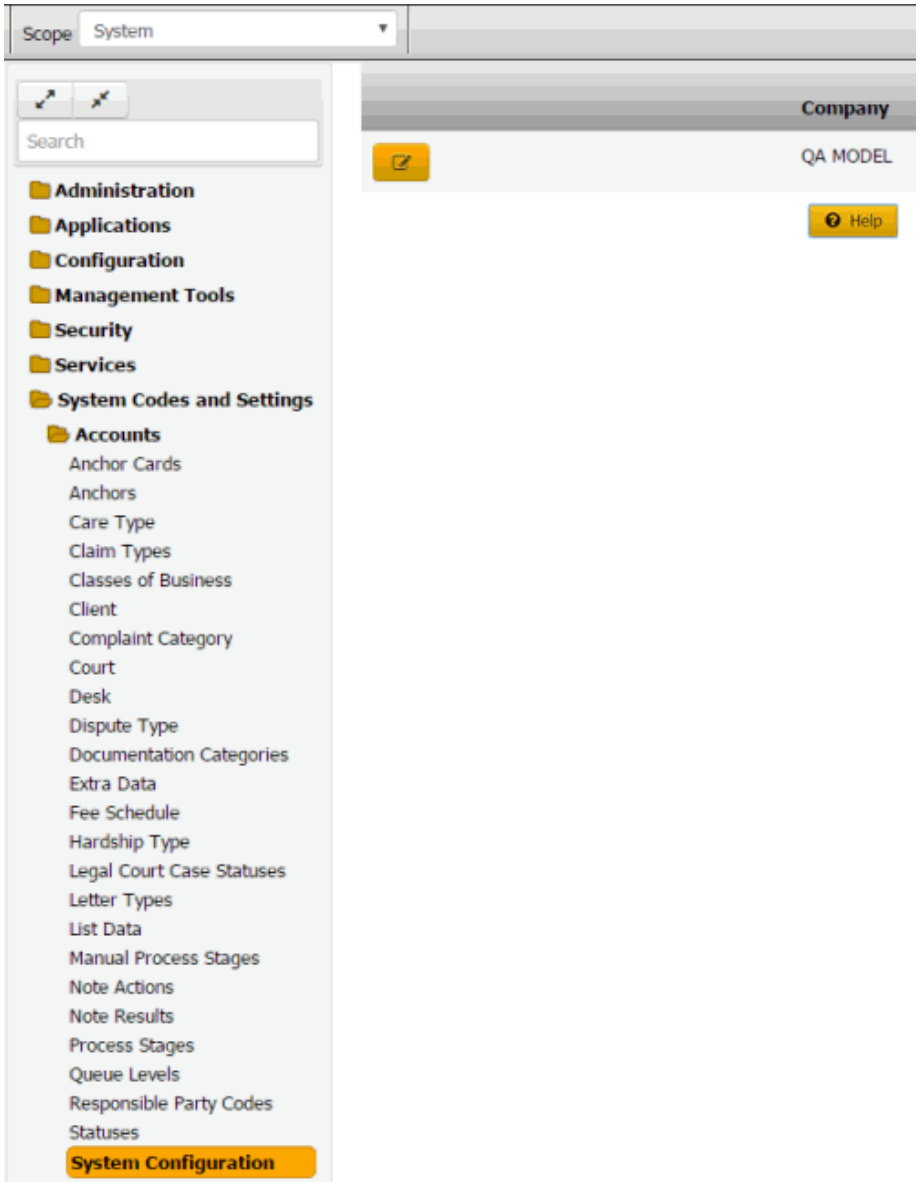
Feedback

Maintain Company Information

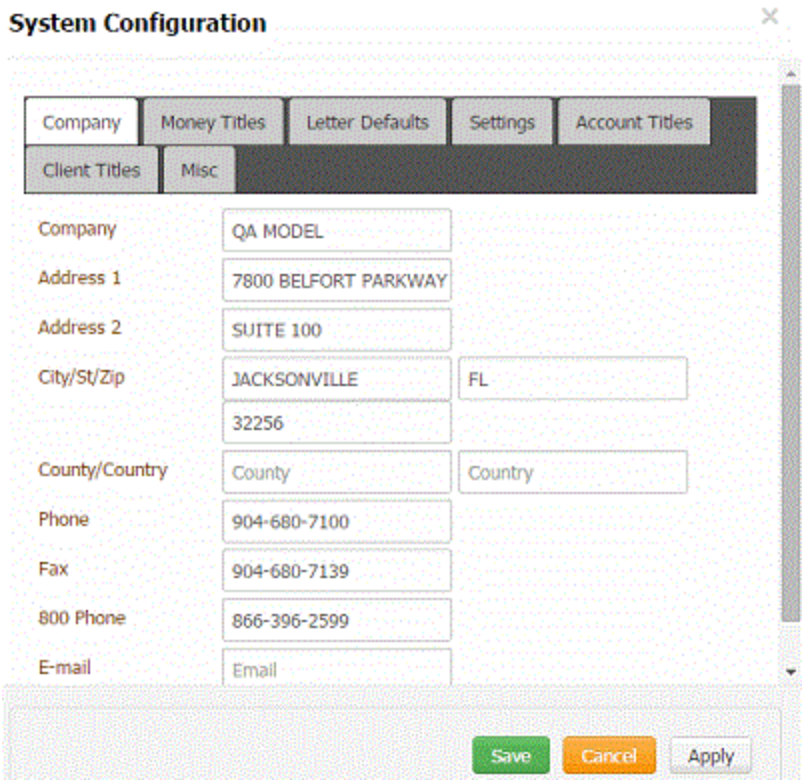
Use the **Company** tab to maintain information about your organization.

To maintain company information

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **System Configuration**.



2. Click the Edit icon and then click the **Company** tab.



Company: Name of your organization.

Address 1: First line of your organization's street address.

Address 2: Second line of your organization's street address.

City/State/ZIP: Your organization's city, state, and postal code.

County/Country: Your organization's county and country.

Phone: Your organization's phone number.

Fax: Your organization's fax number.

800 Phone: Your organization's 1-800 phone number.

Email: Your organization's email address.

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

Related Topics

Search for a Permission or System Code

Search for a Permission or System Code

System Configuration

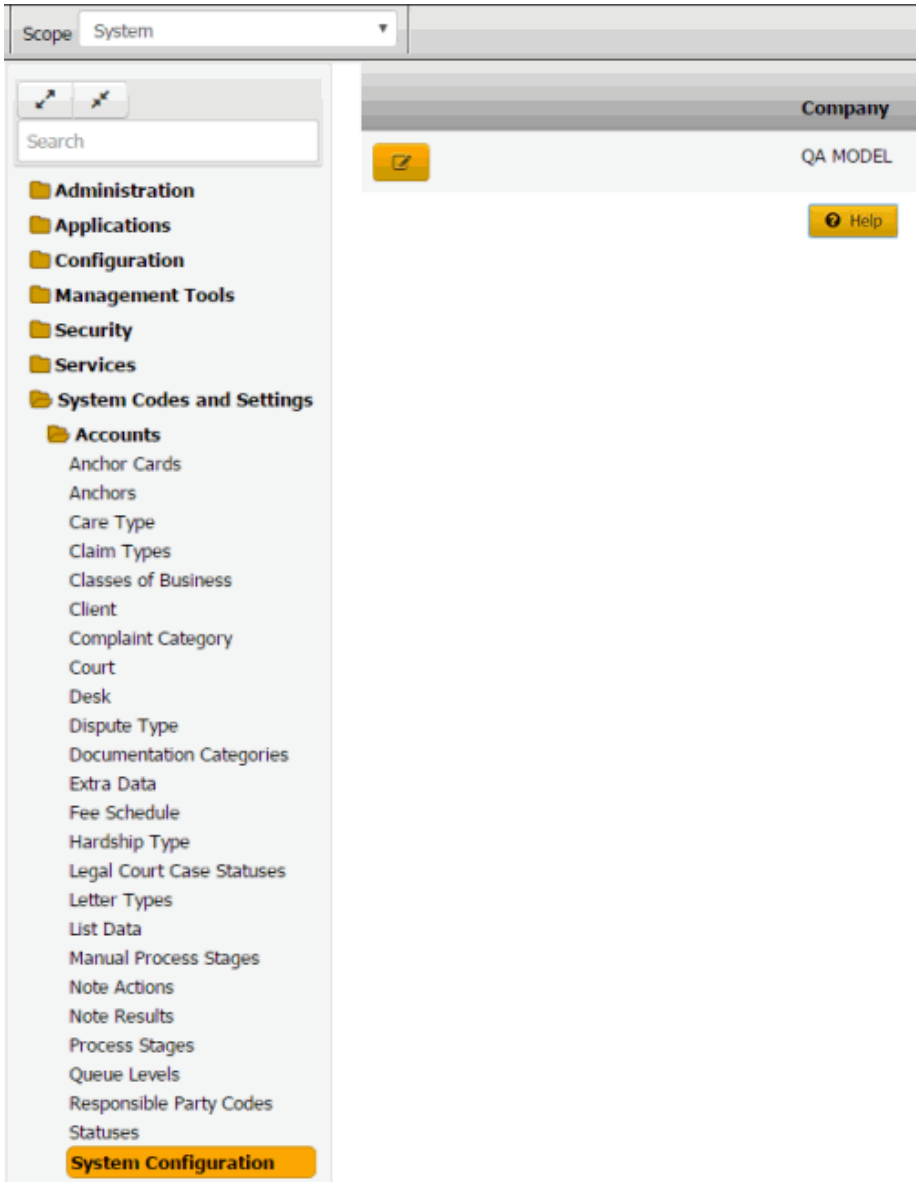
Feedback

Maintain Money Titles

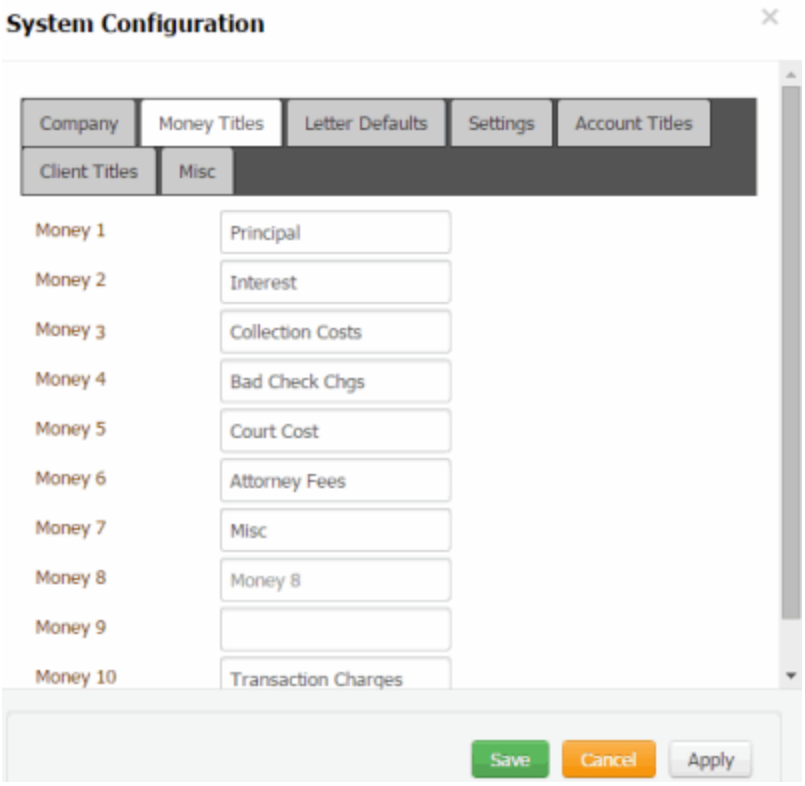
Use the **Money Titles** tab to specify labels for the money buckets that store money amounts for accounts.

To maintain money titles

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **System Configuration**.



2. Click the Edit icon and then click the **Money Titles** tab.



Money 1: Latitude reserves this money bucket for principal.

Money 2: Latitude reserves this money bucket for interest.

Money 10: Latitude reserves this money bucket for transaction charges.

Money 3 through **Money 9:** You can use these money buckets to store whatever money amounts you want. The values you provide in these boxes become the labels for these amounts when they appear in other areas of the system (for example, the **Balance Details** panel).

3. Add up to seven labels and then click **Save**.

Note: We recommend that you don't change the money buckets after you set them up and add accounts to Latitude.

Related Topics

Search for a Permission or System Code

System Configuration

View Account Balance Details

Maintain Judgment Information

Judgment Award Bucket Mappings Permission

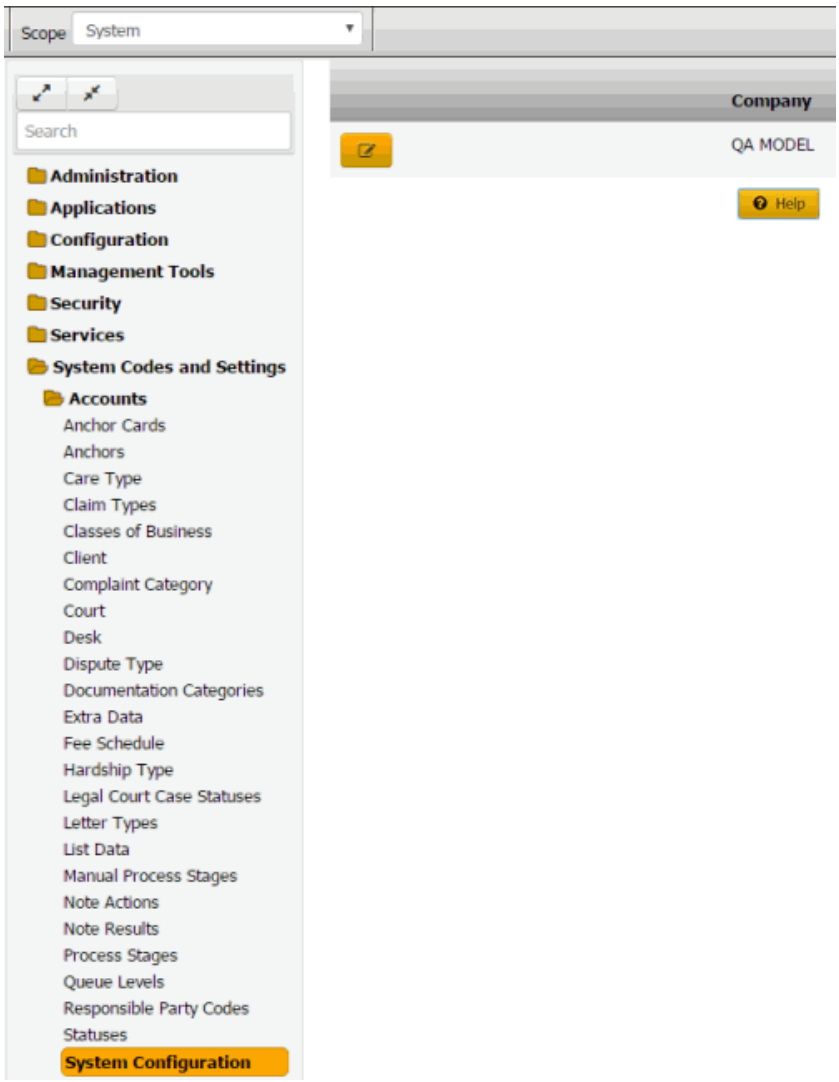
Feedback

Maintain Letter Defaults

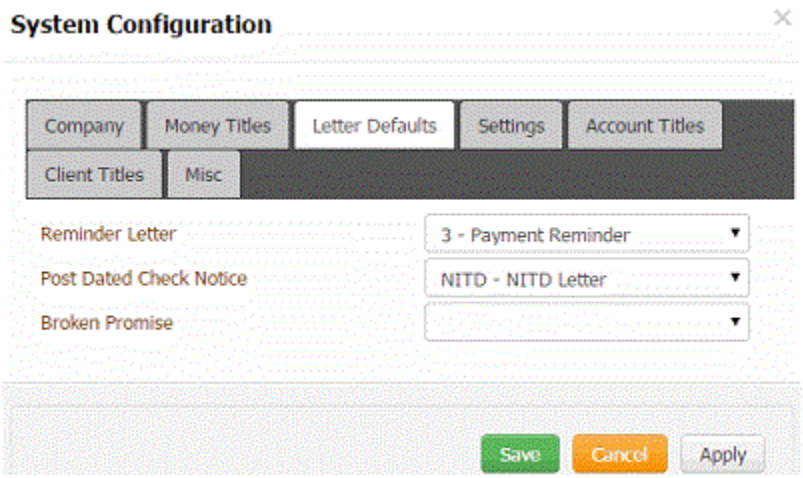
Use the **Letter Defaults** tab to specify the default letter to generate for specific transactions. You generate letters using Letter Console. For more information about Letter Console, see the *Letter Console* documentation.

To maintain letter defaults

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **System Configuration**.



2. Click the Edit icon and then click the **Letter Defaults** tab.



Reminder Letter: Letter to remind customers of their payment promise due date and amount due. Latitude generates this letter when a user adds a promise to an account.

Post Dated Check Notice: Letter to notify the customer of the deposit date. Latitude generates this letter when a user adds a post-dated check or credit card payment to an account.

Broken Promise: Letter to notify the customer that the date they promised to pay has passed. Latitude generates this letter when a promise becomes past due without receiving a payment.

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

Related Topics

Search for a Permission or System Code

System Configuration

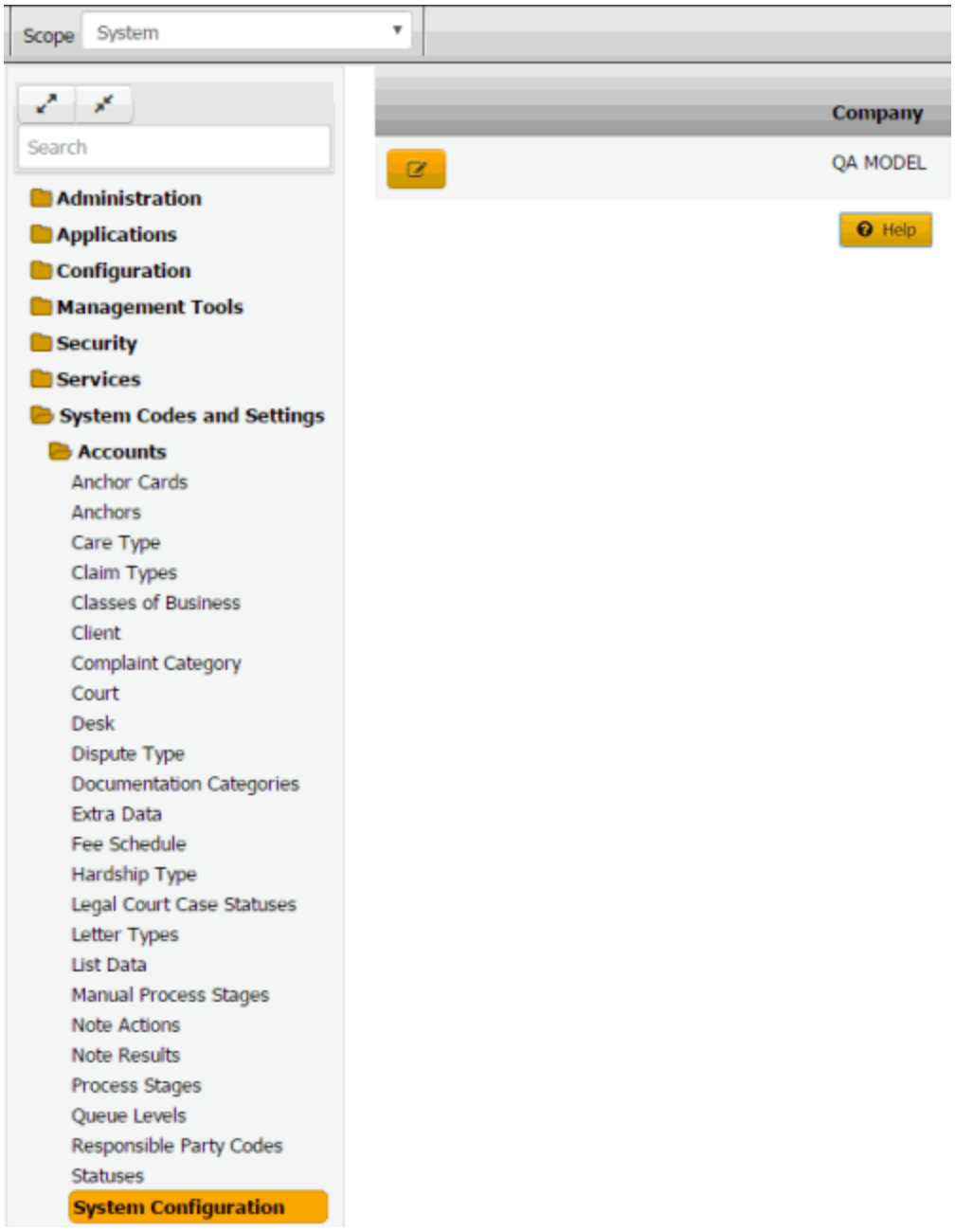
Feedback

Maintain System Settings

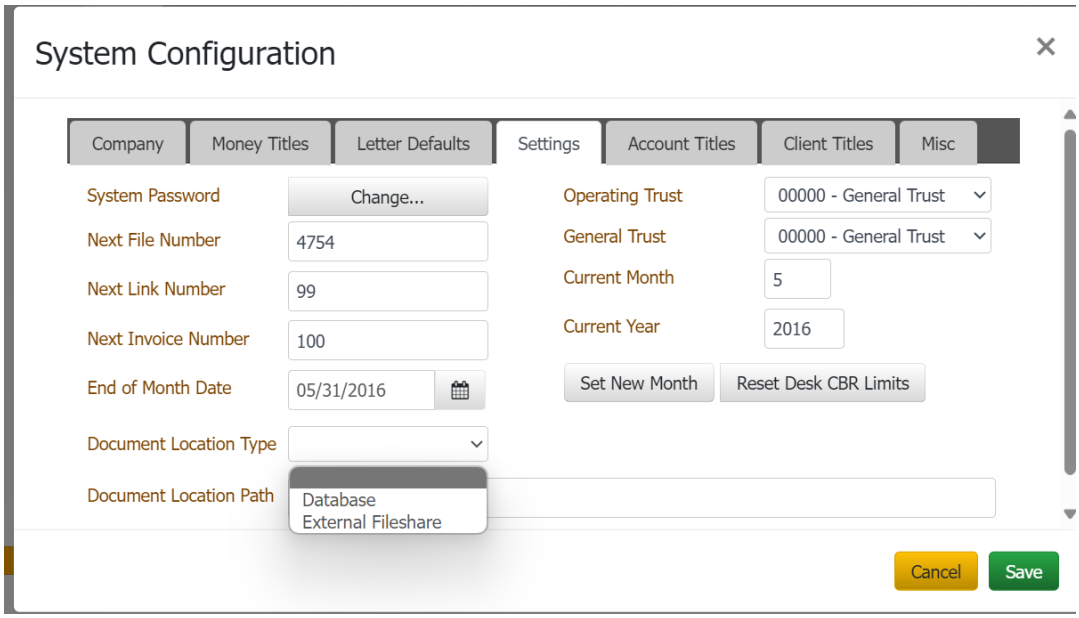
Use the **Settings** tab to specify system-wide default settings.

To maintain system settings

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **System Configuration**.



2. Click the Edit icon and then click the **Settings** tab.



System Password: Allows the administrator account user to reset the administrator account password.

Next File Number: Unique number to assign to the next new account. Latitude assigns the next sequential file number to each account added thereafter. We recommend that you don't change this number after importing accounts initially.

Next Link Number: Unique number to assign to the next link created. A link number identifies a group of linked accounts. Latitude assigns the next sequential link number to each link created thereafter.

Next Payment Batch: Unique number to assign to the next payment batch created for adding payments. Latitude assigns the next sequential payment batch number to each payment batch created thereafter.

Next Invoice Number: Unique number to assign to the next invoice generated using the Invoices program. Latitude assigns the next sequential invoice number to each invoice created thereafter.

General Trust: Account used for deposits when the customer doesn't have a trust account assigned. The account assigned as the General Trust account initially (upon upgrade or conversion) is the bank account with the lowest code number assigned.

Operating Trust: Account used for transaction surcharge deposits. You can use the same bank as the General Trust account. The account assigned initially (upon upgrade) is the bank account with the lowest code number assigned.

Current Month: Current processing month for Latitude. Only change the month using this list box during system implementation or when directed by Latitude by Genesys Support. All other times, click **Set New Month** instead.

Current Year: Current processing year for Latitude. Only change the year using this list box during system implementation or when directed by Latitude by Genesys Support. All other times, click **Set New Month** instead.

End of Month Date: Last posting day for the current month. This date isn't necessarily the last calendar day of the month.

Document Location Type: Database or External File share. Indicates where documents attached to an account should be stored.

Document Location Path: Path where documents attached to an account should be saved. Needs to enter if Document Location Type is External File share.

Set New Month: Advances the accounting period to the next month and, if applicable, year.

Note: Process payments, adjustments, invoices, new business imports, and reports for the current month and year before changing the accounting period. For example, you can process June business in July as long as you haven't changed the accounting period to July.

Reset Desk CBR Limits: Resets the number of Credit Bureau Requests (CBRs) to zero (0) for all desks. You configure desks with a limit to the number of CBRs the desk can request each month. When you change the accounting period, reset the number of CBRs.

3. To set the next accounting period after your organization has completed monthly processing, do the following:

    a. Click **Set New Month** and in the confirmation dialog box, click **Yes**. Latitude advances the current month to the next month. If it's the end of the year, Latitude advances the current year to the next year.

    b. Verify the end of month date. If the date is incorrect, in the **End Of Month Date** box, type or click the correct date.

4. Complete the information in the dialog box and then click **Save**.

Related Topics

Search for a Permission or System Code

System Configuration

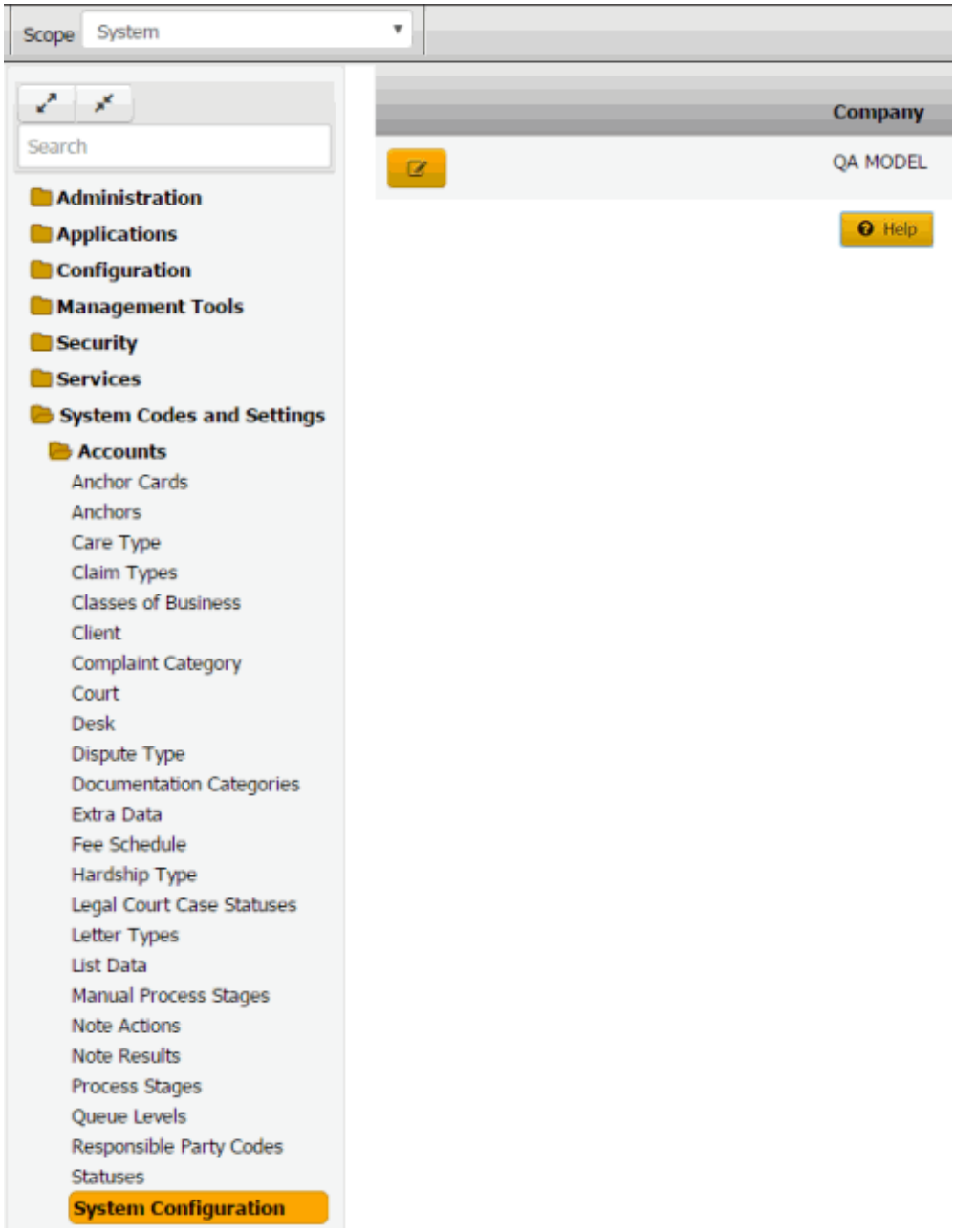
Feedback

Maintain Account Titles

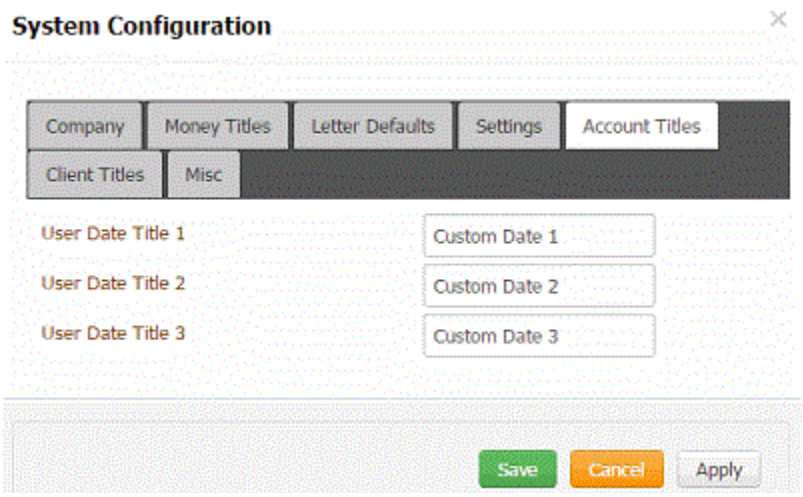
Use the **Account Titles** tab to specify labels for miscellaneous dates you want to record on accounts.

To maintain account titles

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **System Configuration**.



2. Click the Edit icon and then click the **Account Titles** tab.



User Date Title 1 through **User Date Title 3:** The values you provide in these boxes become the labels for dates you want to appear on the **Account Dates** panel. For example, if you type "Date First Billed" in the **User Date Title 1** box, "Date First Billed" appears as a label next to an input box on the **Account Dates** panel. For more information, see View or Modify Account Dates.

3. Add up to three labels and then click **OK**.

Related Topics

Search for a Permission or System Code

System Configuration

View or Modify Account Dates

Client Titles

Feedback

Client Titles

You can specify labels for data that you want users to record when adding or modifying clients. For more information, see Custom Data.

Related Topics

Maintain Client Date Titles

Maintain Client Option Titles

Maintain Client Value Titles

Maintain Client Text Titles

Search for a Permission or System Code

System Configuration

Custom Data

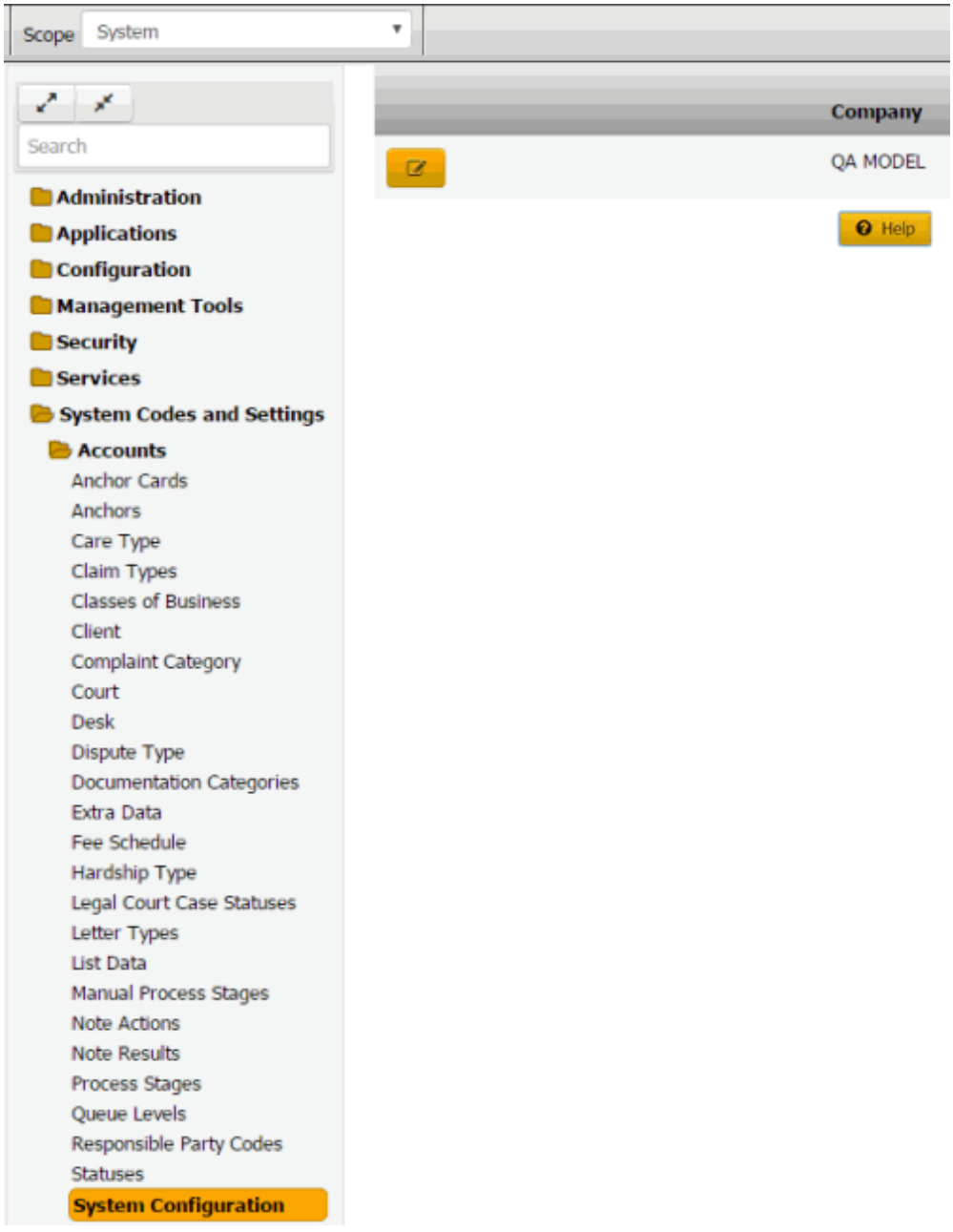
Feedback

Maintain Client Date Titles

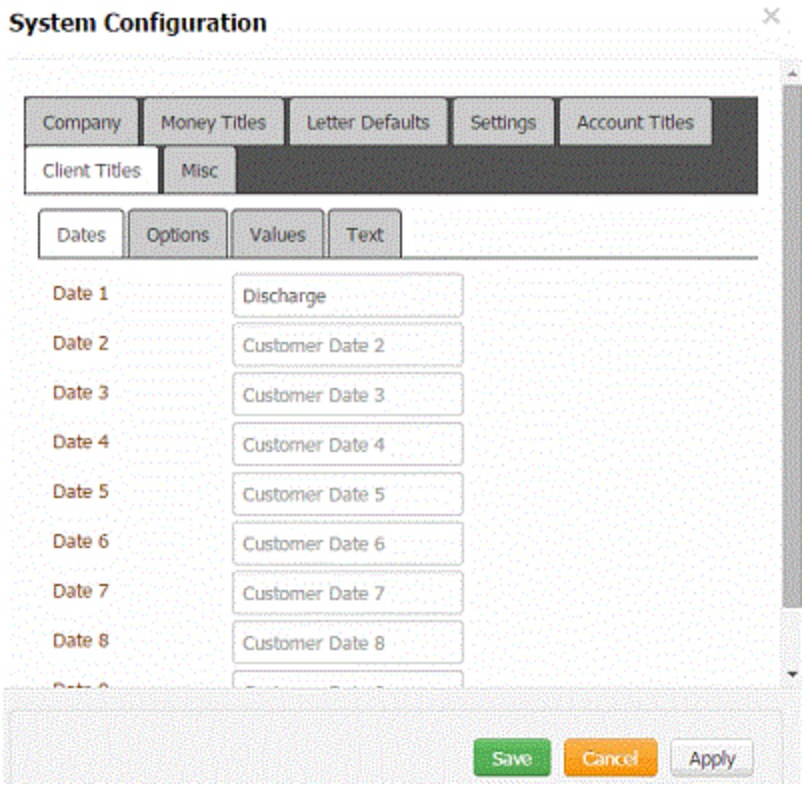
Use the **Dates** tab to specify up to nine labels for dates to display when adding or modifying client accounts.

To maintain client date titles

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **System Configuration**.



2. Click the Edit icon.
3. Click the **Customer Titles** tab and then click the **Dates** tab.



Date 1 through **Date 9:** The values you provide in these boxes become the labels for dates you want to appear when adding a client. For example, if you type "Discharge" in the **Date 1** box, "Discharge" appears as a label next to an input box on the **Custom** tab. For more information, see Maintain Custom Dates.

4. Complete the information and then click **Save**.

Related Topics

Search for a Permission or System Code

Client Titles

Maintain Custom Dates

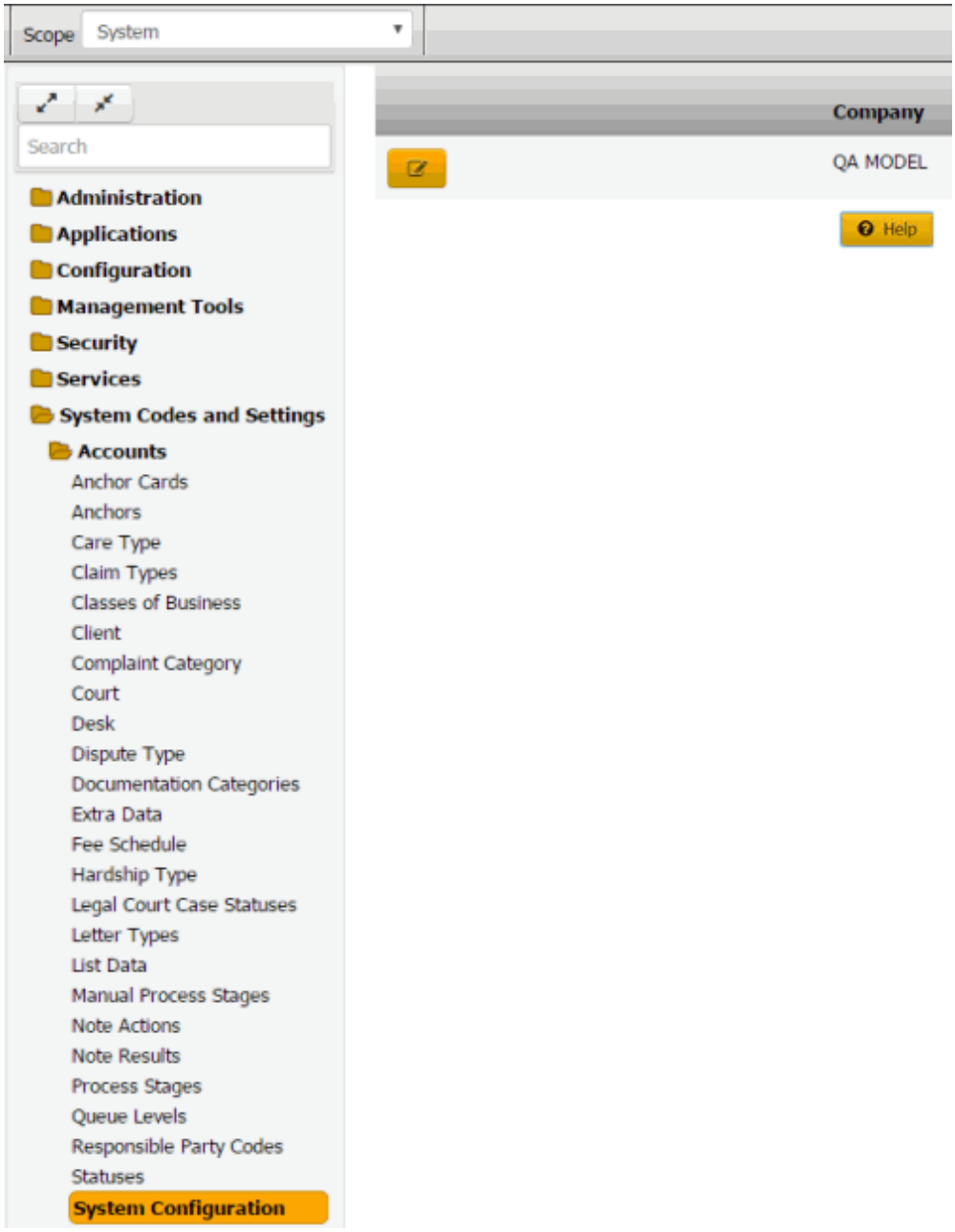
Feedback

Maintain Client Option Titles

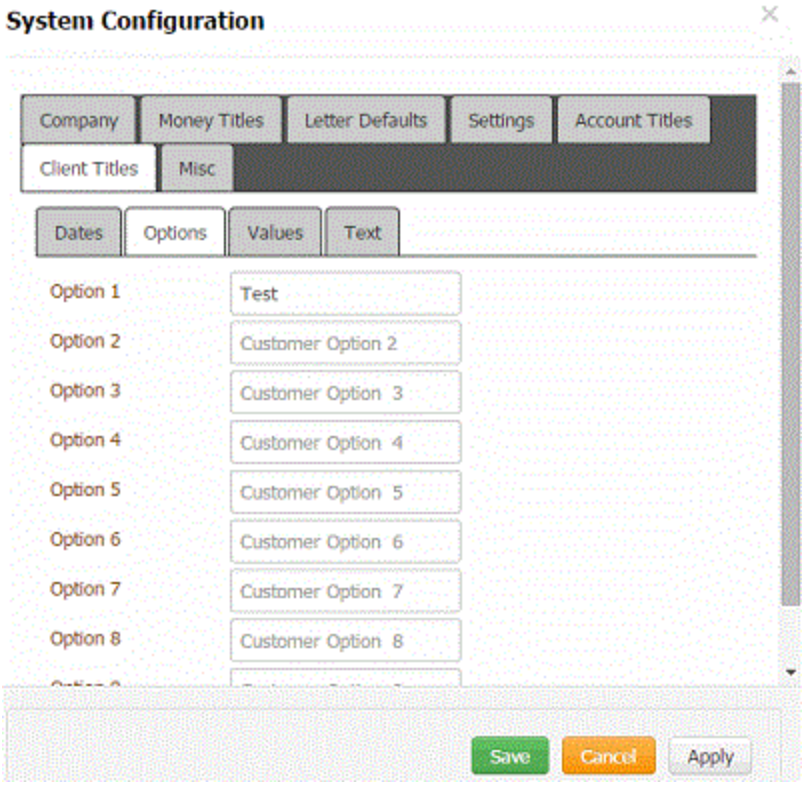
Use the **Options** tab in the **Client Titles** panel to specify up to nine labels for check box options to display when adding or modifying clients.

To maintain client option titles

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **System Configuration**.



2. Click the Edit icon.
3. Click the **Customer Titles** tab and then click the **Options** tab.



Option 1 through **Option 9:** The values you provide in these boxes become the labels for options you want to appear on the **Custom** tab in the **Client** dialog box. For example, if you type "Filed Bankruptcy" in the **Option 1** box, "Filed Bankruptcy" appears as a label next to an input box on the **Custom** tab. For more information, see Maintain Custom Options.

4. Complete the information and then click **Save**.

Related Topics

Search for a Permission or System Code

Client Titles

Maintain Custom Options

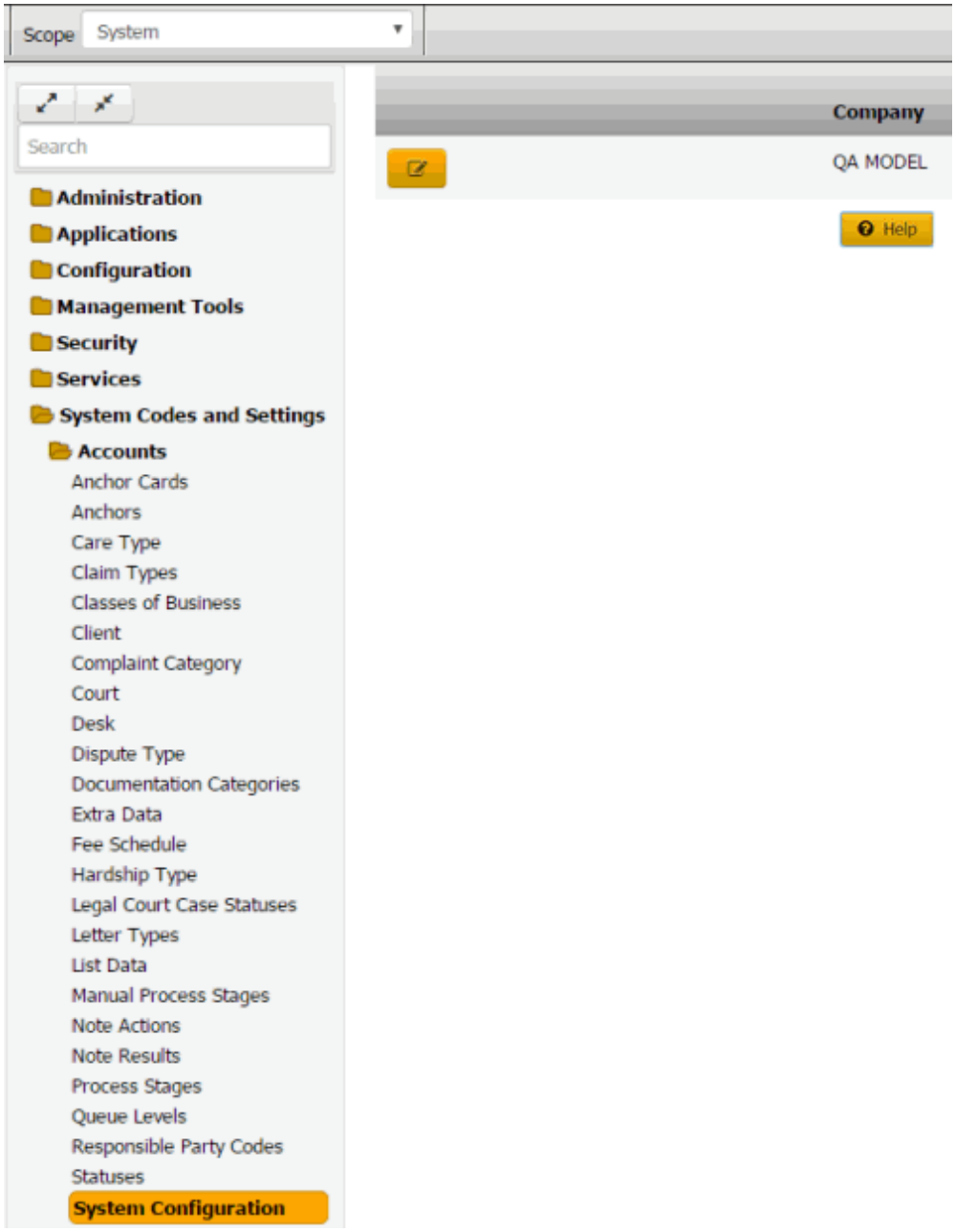
Feedback

Maintain Client Text Titles

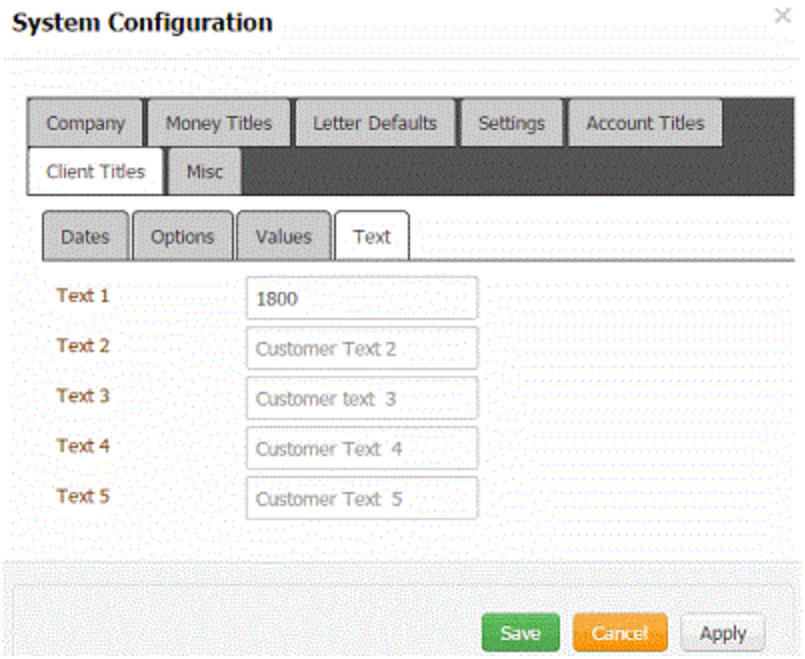
Use the **Text** tab in the **Client Titles** panel to specify up to nine labels for text to display when adding or modifying clients.

To maintain client text titles

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **System Configuration**.



2. Click the Edit icon.
3. Click the **Customer Titles** tab and then click the **Text** tab.



Text 1 through **Text 9:** The values you provide in these boxes become the labels for text you want to appear on the **Custom** tab in the **Client** dialog box. For example, if you type "Bankruptcy Status" in the **Text 1** box, "Bankruptcy Status" appears as a label next to an input box on the **Custom** tab. For more information, see Maintain Custom Text.

4. Complete the information and then click **Save**.

Related Topics

Search for a Permission or System Code

Client Titles

Maintain Custom Text

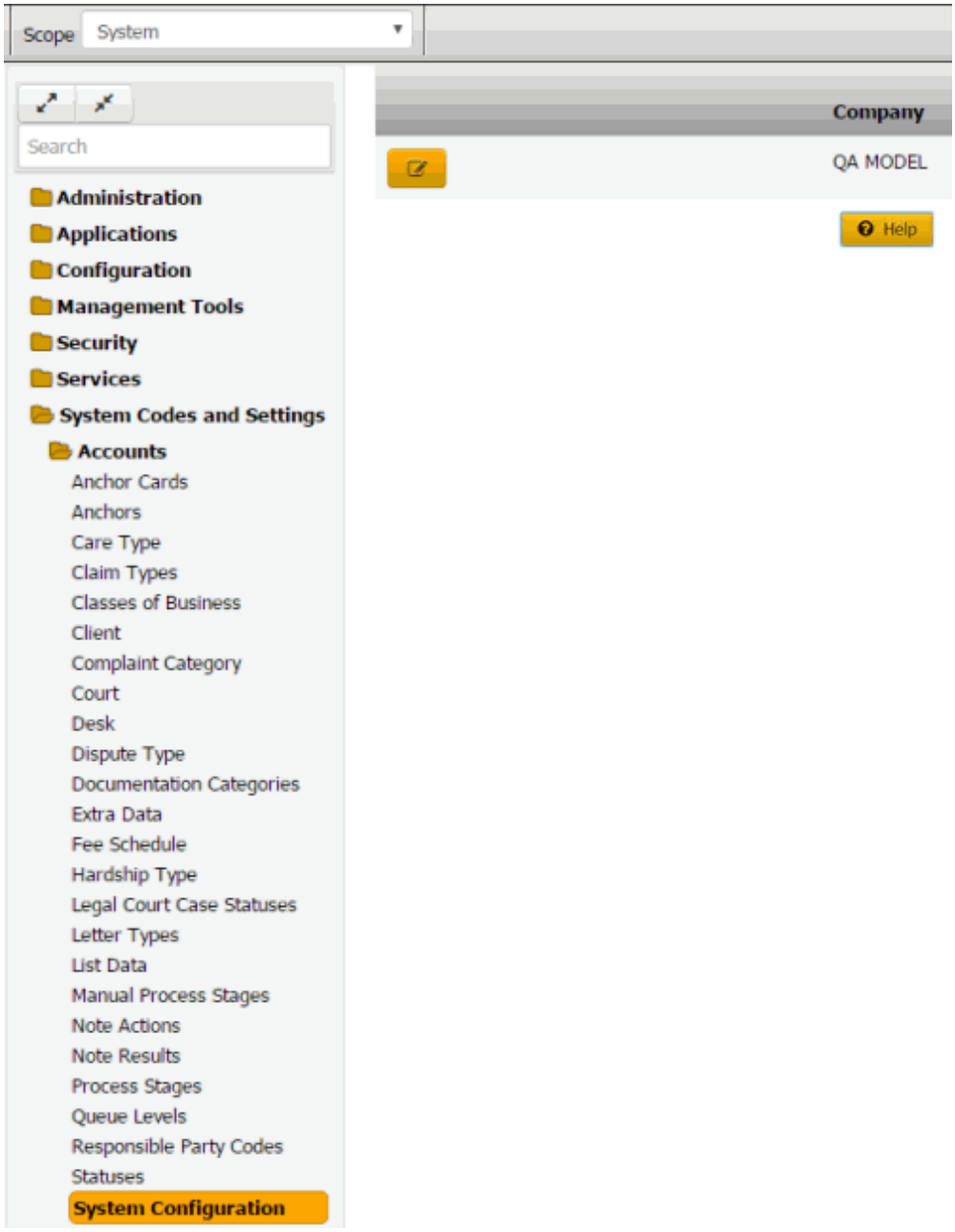
Feedback

Maintain Client Value Titles

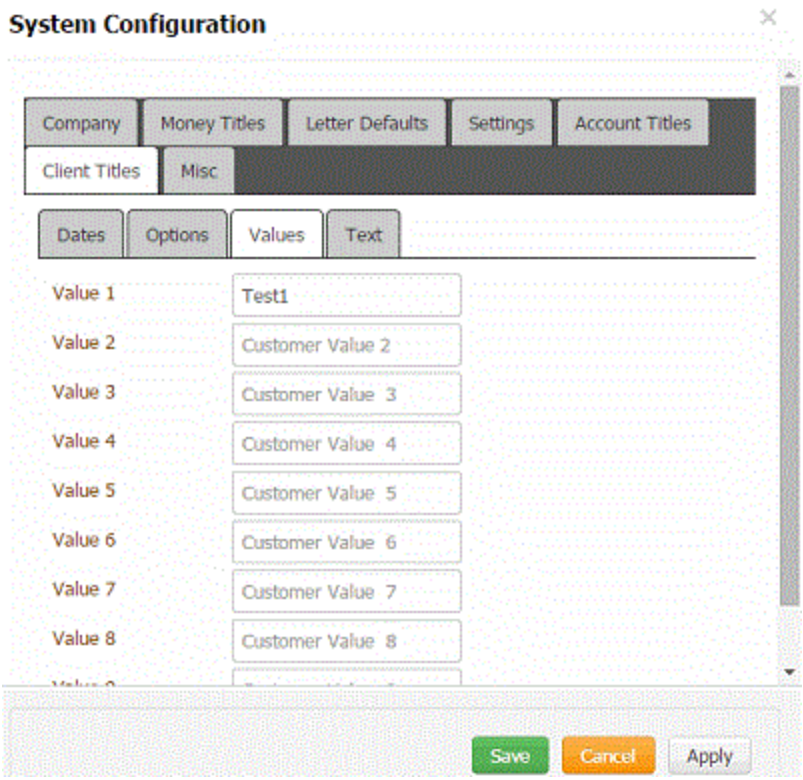
Use the **Values** tab in the **Client Titles** panel to specify up to nine labels for numeric values to display when adding or modifying clients.

To maintain client value titles

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **System Configuration**.



2. Click the Edit icon.
3. Click the **Customer Titles** tab and then click the **Values** tab.



Value 1 through **Value 9:** The values you provide in these boxes become the labels for numeric values you want to appear on the **Custom** tab in the **Client** dialog box. For example, if you type "Number of Bankruptcies Filed" in the **Value 1** box, "Number of Bankruptcies Filed" appears as a label next to an input box on the **Custom** tab. For more information, see Maintain Custom Values.

4. Complete the information and then click **Save**.

Related Topics

Search for a Permission or System Code

Client Titles

Maintain Custom Values

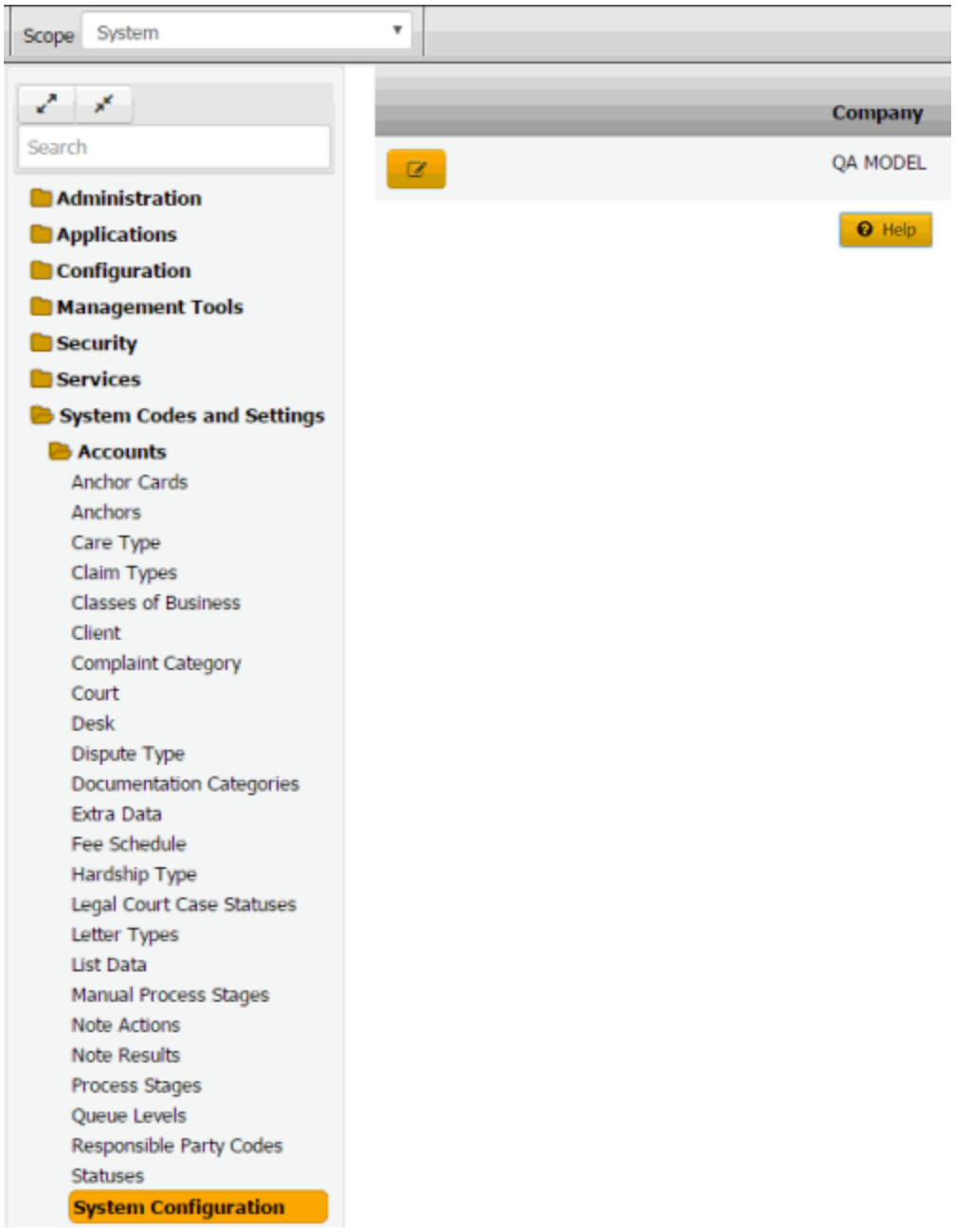
Feedback

Maintain Miscellaneous Settings

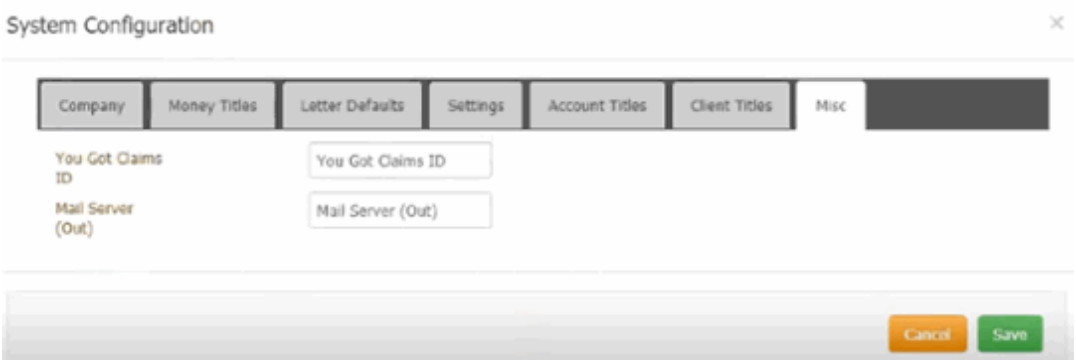
Use the **Misc** tab to specify the "You've Got Claims" identification number, the name of your outgoing email server, and the path to your custom reports.

To maintain miscellaneous settings

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **System Configuration**.



2. Click the Edit icon and then click the **Misc** tab.



You Got Claims ID: "You've Got Claims" identification number used for accounts placed with an attorney.

Mail Server (Out): Network name of the outgoing email server. If this setting is incorrect, email letter functions fail.

Crystal Reports Path: Path to the custom reports your organization creates.

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

Related Topics
Search for a Permission or System Code

System Configuration

Customer Groups

Customer Groups

You can set up and configure system codes that users can assign to Customer Groups for an account.

Related Topics
ABA Routing Numbers

Banks

Credit Card Types

Legal Ledger Types

Payment Methods

Payment Sub-Batch Types

Salesman

System Codes and Settings

Custom Customer Groups

Custom Customer Groups
You can search for, add, modify, and delete custom customer groups.

Related Topics
Add a Custom Customer Groups

Modify a Custom Customer Groups

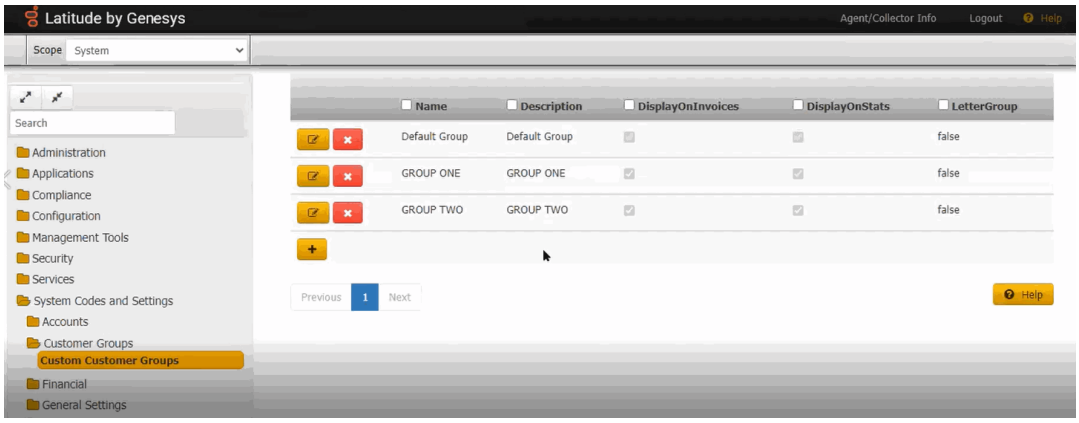
Delete a Custom Customer Groups

Add a Custom Customer Groups

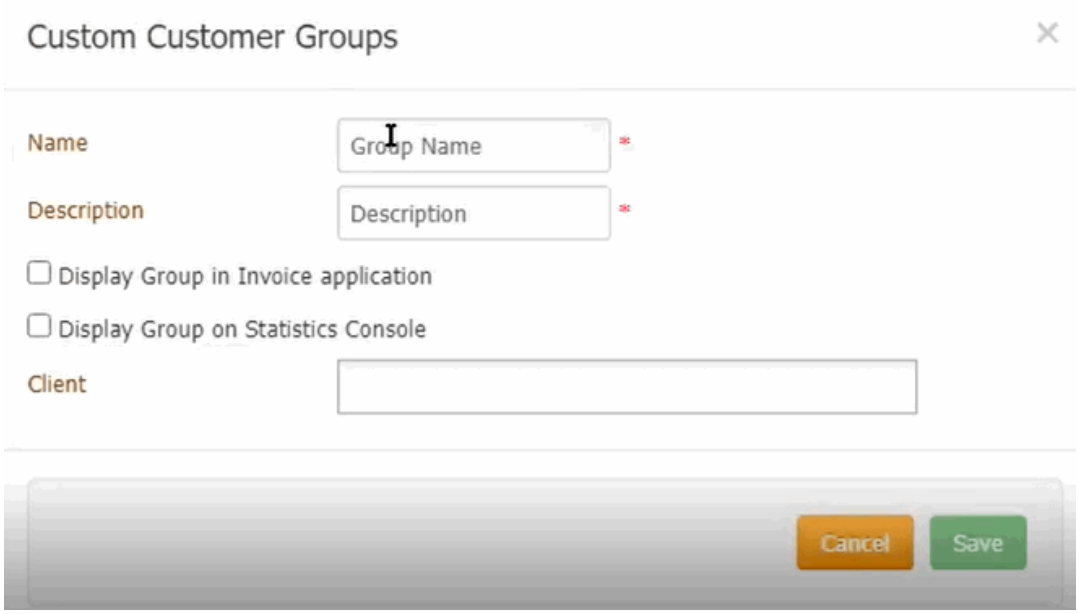
Use the Custom Customer Groups dialog box to add a Customer Groups.

To add a Customer Groups

1. In the **Navigation** pane, click **System Codes and Settings** > **Customer Groups** > **Custom Customer Groups**.



2. Click the plus sign (+). The **Custom Customer Group** dialog box appears.



Name: Custom Customer Group name

Description: Description of the Custom Customer Group

Display Group in Invoice application: If selected the Custom Customer Group is added in Invoice application.

Display Group on Statistics Console: If selected the Custom Customer Group is added on Statistics console.

Client: Select the clients which needs to be part of the current custom-customer group.

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

Related Topics

Search for a Permission or System Code

Data Grids

Modify a Custom Customer Groups

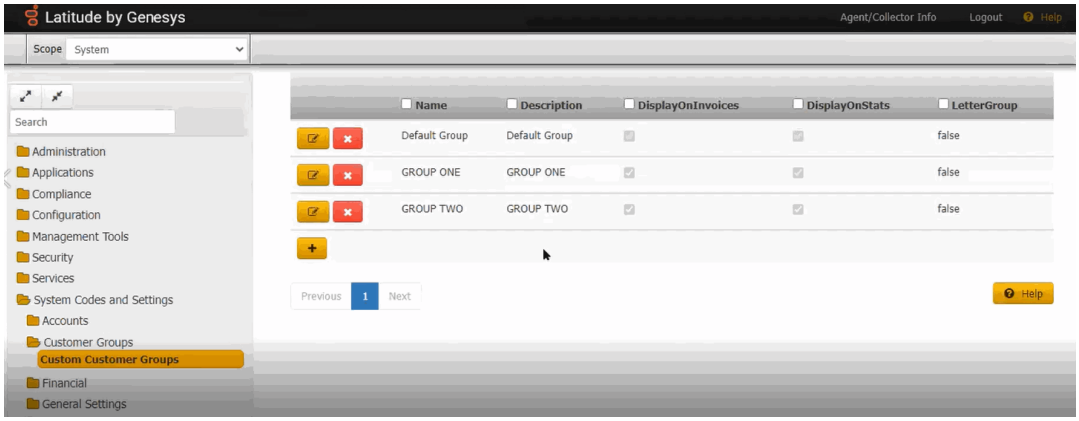
Delete a Custom Customer Groups

Modify a Custom Customer Groups

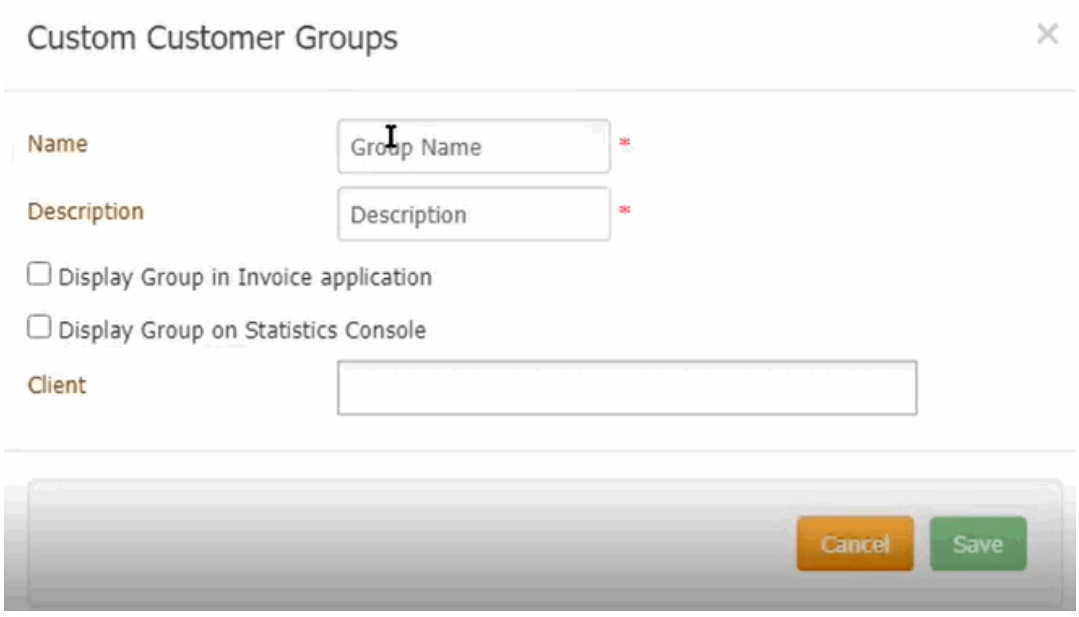
Use the Custom Customer Groups dialog box to modify a Customer Groups.

To modify a Customer Groups

1. In the **Navigation** pane, click **System Codes and Settings** > **Customer Groups** > **Custom Customer Groups**.



2. Click the Edit icon. The **Custom Customer Group** dialog box appears.



Name: Custom Customer Group name

Description: Description of the Custom Customer Group

Display Group in Invoice application: If selected the Custom Customer Group is added in Invoice application.

Display Group on Statistics Console: If selected the Custom Customer Group is added on Statistics console.

Client: Select the clients which needs to be part of the current custom-customer group.

3. Modify the information and then click **Save**.

Related Topics
Search for a Permission or System Code

Data Grids

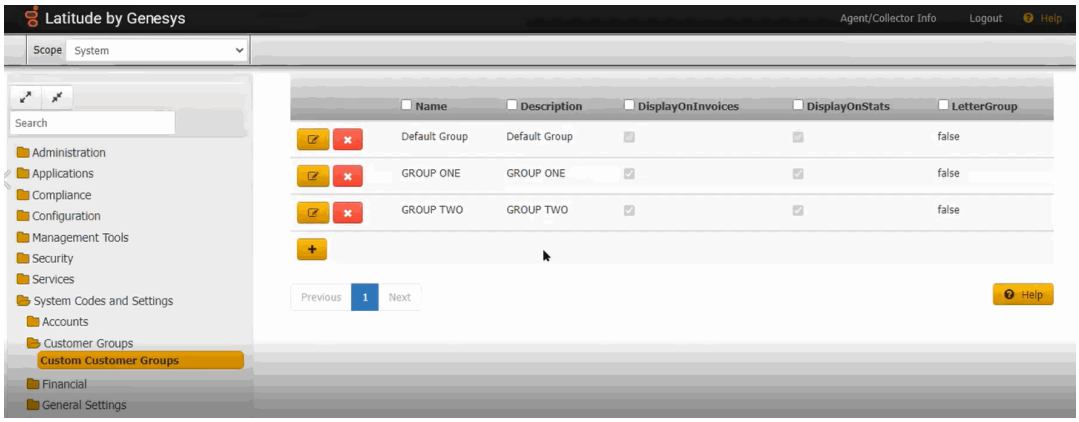
Add a Custom Customer Groups

Delete a Custom Customer Groups

Delete a Custom Customer Groups
Use the Custom Customer Groups dialog box to delete a Customer Groups.

To delete a Customer Groups

1. In the **Navigation** pane, click **System Codes and Settings** > **Customer Groups** > **Custom Customer Groups**.



2. Click the Delete icon and then click **Yes**.

Related Topics
Search for a Permission or System Code

Data Grids

Add a Custom Customer Groups

Modify a Custom Customer Groups

Financial Codes

Feedback

Financial Codes

You can set up and configure system codes that users can assign to financial transactions for an account.

Related Topics
ABA Routing Numbers

Banks

Credit Card Types

Legal Ledger Types

Payment Methods

Payment Sub-Batch Types

Salesman

System Codes and Settings

ABA Routing Numbers

ABA Routing Numbers

You can search for, add, modify, and delete American Bankers Association (ABA) routing numbers. Latitude uses these numbers to verify the financial institution when users submit a check, ACH, electronic funds transfer, or online banking transaction. Users specify a routing number when adding an ACH or paper draft account to a customer's account. For more information, see Add an ACH or Paper Draft Account.

Related Topics

Add an ABA Routing Number

Modify an ABA Routing Number

Delete an ABA Routing Number

Search for a Permission or System Code

Data Grids

Financial Codes

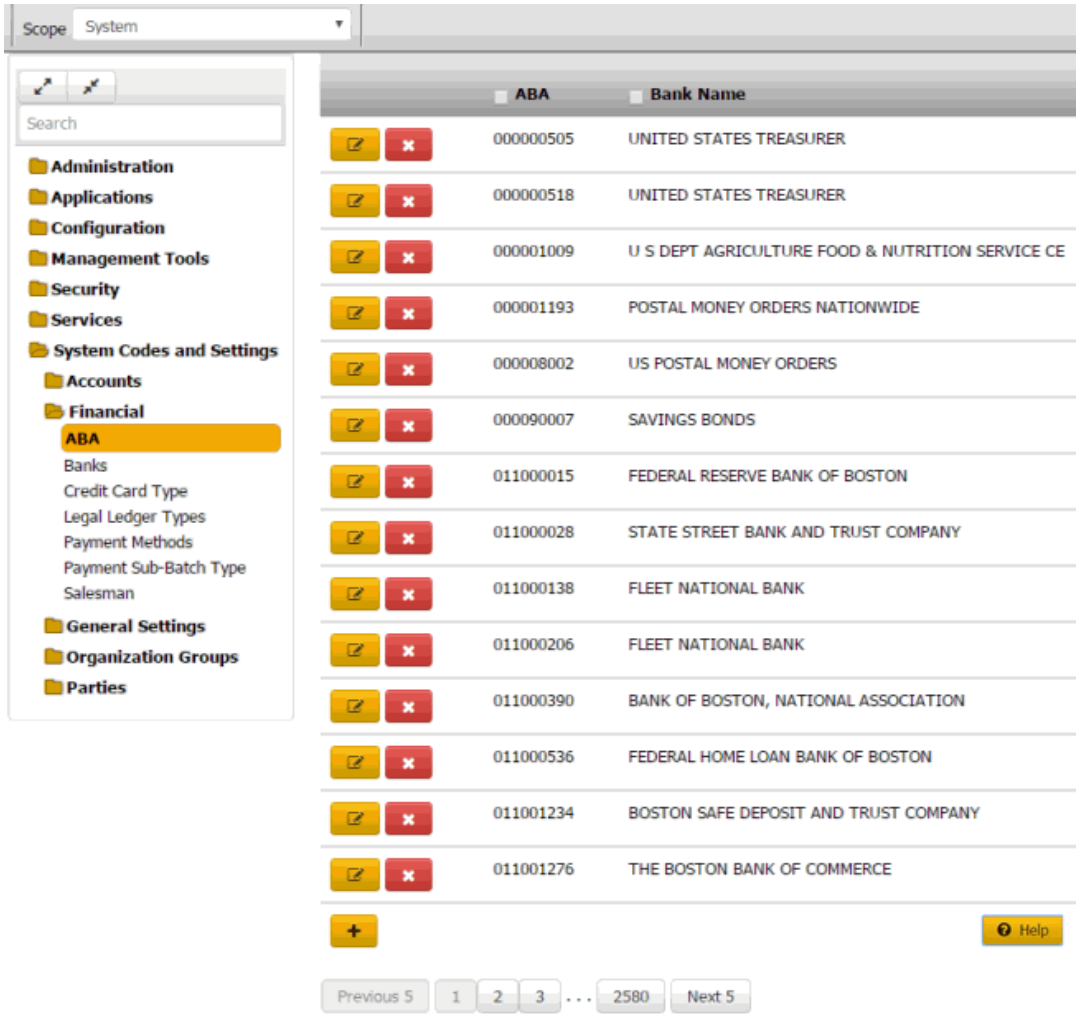
Add an ACH or Paper Draft Account

Add an ABA Routing Number

Use the **ABA** dialog box to add an ABA routing number.

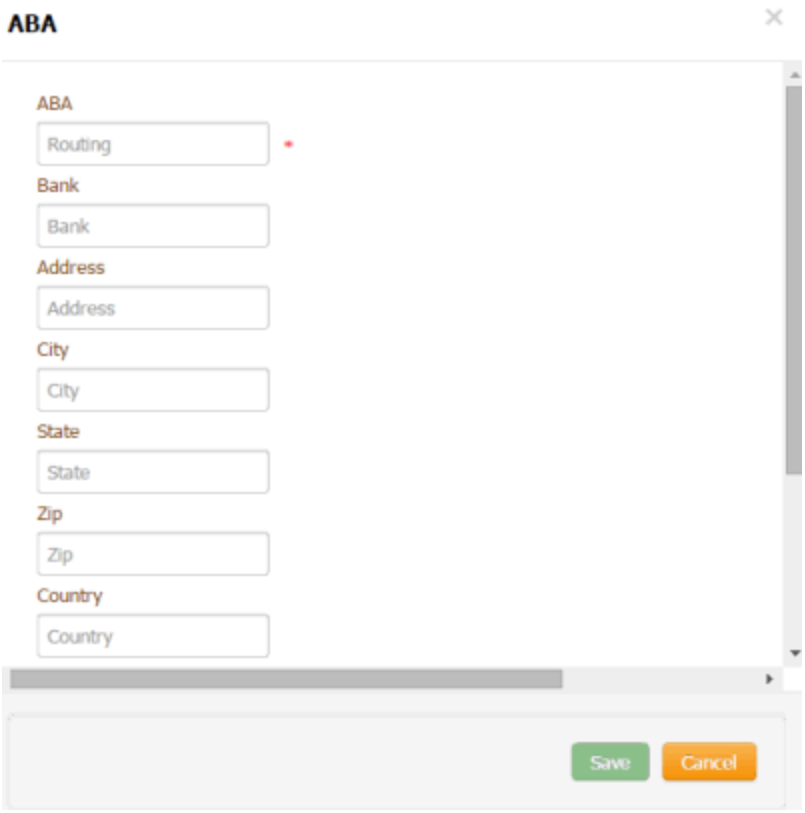
To add an ABA routing number

1. In the **Navigation** pane, click **System Codes and Settings** > **Financial** > **ABA**.



Tip: To limit the records that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

2. Click the plus sign (+). The **ABA** dialog box appears.



ABA: Routing number that identifies the bank.

Bank: Name of the bank.

Address: Bank's street address.

City: Bank's city.

State: Bank's state.

Zip: Bank's ZIP Code.

Country: Bank's country.

County: Bank's county.

Phone: Bank's phone number.

Fax: Bank's fax number.

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

Related Topics

Search for a Permission or System Code

Data Grids

ABA Routing Numbers

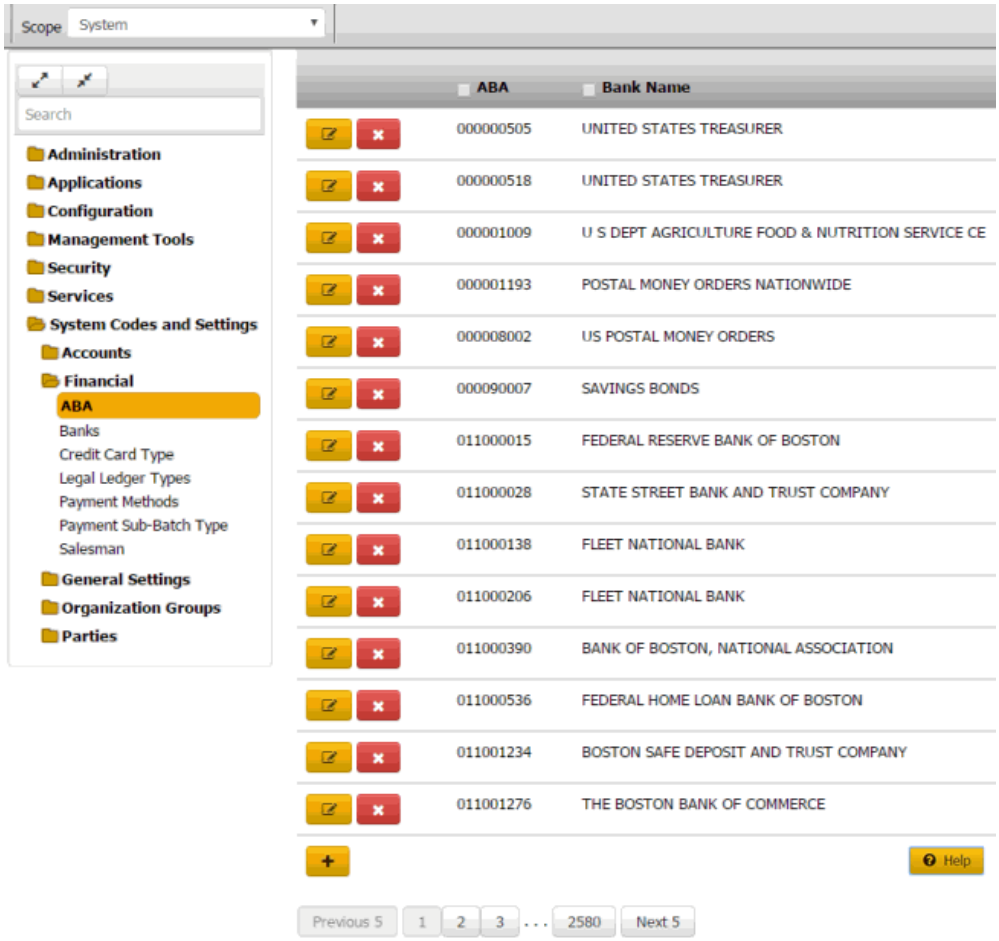
Feedback

Modify an ABA Routing Number

Use the **ABA** dialog box to modify an ABA routing number.

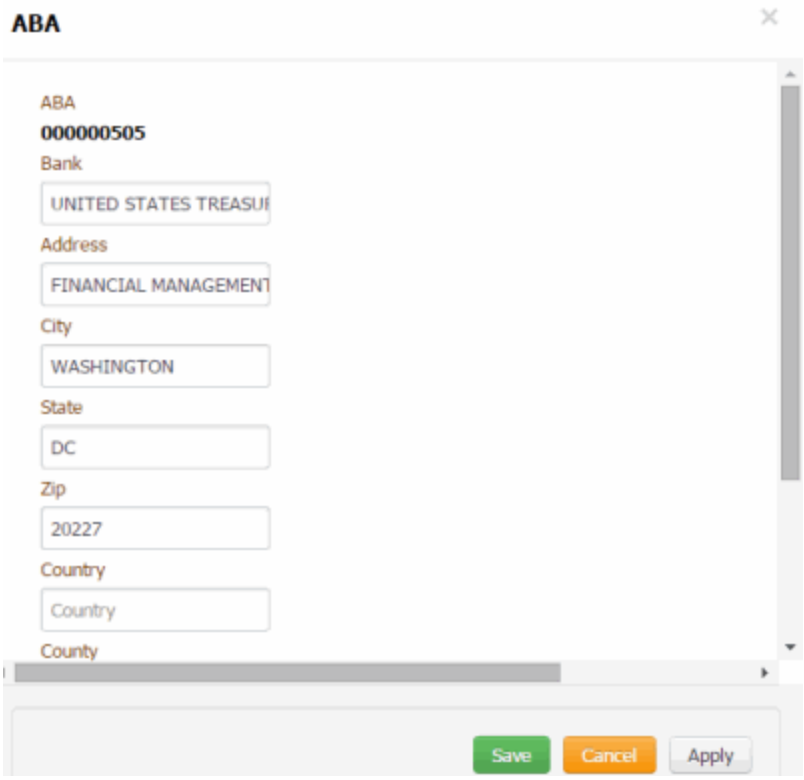
To modify an ABA routing number

1. In the **Navigation** pane, click **System Codes and Settings** > **Financial** > **ABA**.



Tip: To limit the records that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

2. Click the Edit icon. The **ABA** dialog box appears.



ABA: Routing number that identifies the bank.

Bank: Name of the bank.

Address: Bank's street address.

City: Bank's city.

State: Bank's state.

Zip: Bank's ZIP Code.

Country: Bank's country.

County: Bank's county.

Phone: Bank's phone number.

Fax: Bank's fax number.

3. Modify the information and then click **Save**.

Related Topics

Search for a Permission or System Code

Data Grids

ABA Routing Numbers

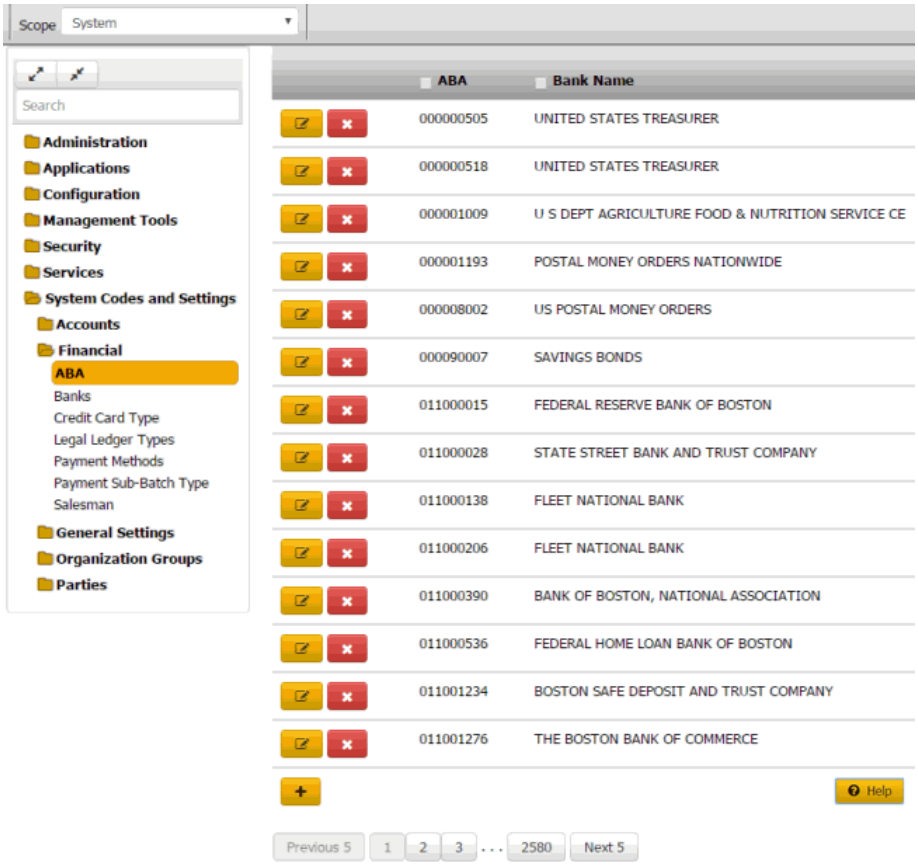
Feedback

Delete an ABA Routing Number

Use the **ABA** panel to delete an ABA routing number.

To delete an ABA routing number

1. In the **Navigation** pane, click **System Codes and Settings** > **Financial** > **ABA**.



Tip: To limit the records that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

2. Click the Delete icon and then click **Yes**.

Related Topics

Search for a Permission or System Code

Data Grids

ABA Routing Numbers

Banks

Banks

You can search for, add, modify, and delete bank codes. Bank codes allow you to set up separate records for each trust account that accepts deposits of funds from your organization.

Related Topics

Search for a Bank

Add a Bank

Modify a Bank

Delete a Bank

Search for a Permission or System Code

Data Grids

Financial Codes

Feedback

Search for a Bank

Use the **Bank** panel to search for a bank.

To search for a bank

1. In the **Navigation** pane, click **System Codes and Settings** > **Financial** > **Banks**.

2. In the **Search** box in the **Bank** panel, type one or more characters to search and then press **Enter** or click the Search icon. The system searches the bank code, display name, and bank type for a match. It displays only the banks that match your search criteria.

3. To clear the search criteria, click **Clear Filters**. The system displays all banks.

Related Topics

Search for a Permission or System Code

Data Grids

Banks

Feedback

Add a Bank

Use the **Bank Properties** dialog box to add a bank.

To add a bank

1. In the **Navigation** pane, click **System Codes and Settings** > **Financial** > **Banks**.

2. Click the plus sign (+). The **Bank Properties** dialog box appears.

Bank Name: Name of the financial institution.

Address 1: First line of the financial institution's street address.

Address 2: Second line of the financial institution's street address.

City: Financial institution's city.

State: Financial institution's state.

ZIP: Financial institution's postal code.

County: Financial institution's county.

Country: Financial institution's country.

Phone: Financial institution's phone number.

Account Code: A numeric code up to five digits in length, that your organization uses to identify the account internally.

Account Title: Title for the account (could include a customer name).

ABA Routing: Nine-digit code that identifies the financial institution.

Checking Account Number: Your organization's checking account number for the trust account.

Starting Check Number: (optional) If your organization is printing checks using the Invoices program, type the first check number to use.

ISO Currency Code: Code that identifies the currency type and country. For example, the currency code for the United States is USD, which signifies United States dollar.

Permit Deposit to General Trust Account: Allows money collected and split between linked accounts having different banks to deposit to the **General Trust** initially. Latitude only includes in the same payment arrangement accounts that deposit to the same trust or general trust.

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

Related Topics

Search for a Permission or System Code

Data Grids

Banks

Feedback

Modify a Bank

Use the **Bank Properties** dialog box to modify a bank.

To modify a bank

1. In the **Navigation** pane, click **System Codes and Settings** > **Financial** > **Banks**.

2. Click the Edit icon. The **Bank Properties** dialog box appears.

Bank Name: Name of the financial institution.

Address 1: First line of the financial institution's street address.

Address 2: Second line of the financial institution's street address.

City: Financial institution's city.

State: Financial institution's state.

ZIP: Financial institution's postal code.

County: Financial institution's county.

Country: Financial institution's country.

Phone: Financial institution's phone number.

Account Code: A numeric code up to five digits in length, that your organization uses to identify the account internally.

Account Title: Title for the account (could include a customer name).

ABA Routing: Nine-digit code that identifies the financial institution.

Checking Account Number: Your organization's checking account number for the trust account.

Starting Check Number: (optional) If your organization is printing checks using the Invoices program, type the first check number to use.

ISO Currency Code: Code that identifies the currency type and country. For example, the currency code for the United States is USD, which signifies United States dollar.

Permit Deposit to General Trust Account: Allows money collected and split between linked accounts having different banks to deposit to the **General Trust** initially. Latitude only includes in the same payment arrangement accounts that deposit to the same trust or general trust.

3. Modify the information and then click **Save**.

Related Topics

Search for a Permission or System Code

Data Grids

Banks

Feedback

Delete a Bank

Use the **Banks** panel to delete a bank.

To delete a bank

1. In the **Navigation** pane, click **System Codes and Settings** > **Financial** > **Banks**.

2. Click the Delete icon and then click **Yes**.

Related Topics

Search for a Permission or System Code

Data Grids

Banks

Credit Card Types

Feedback

Credit Card Types

You can search for, add, modify, and delete credit card types that your organization accepts for payment transactions. Users specify a credit card type when adding a credit card to a payment arrangement. For more information, see Add a Credit Card. The algorithm for the credit card determines whether it is a valid card.

Related Topics

Add a Credit Card Type

Modify a Credit Card Type

Delete a Credit Card Type

Search for a Permission or System Code

Data Grids

Financial Codes

Add a Credit Card

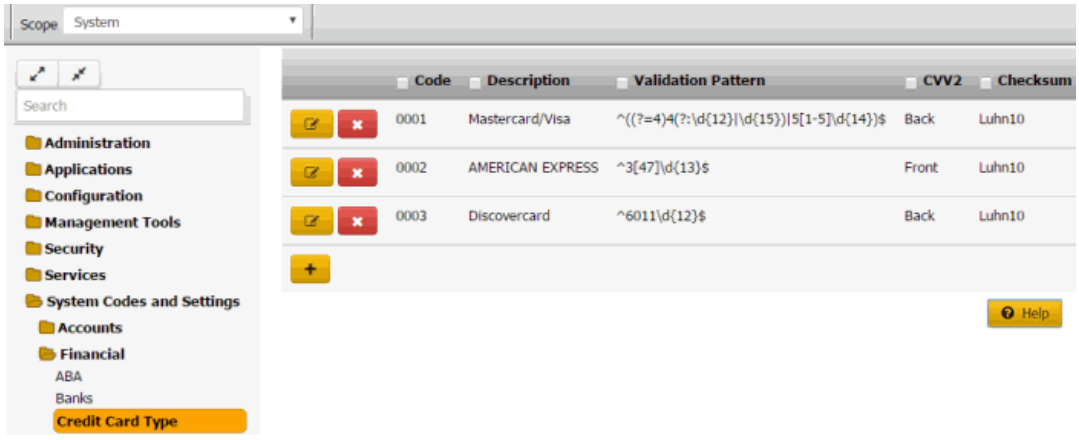
Feedback

Add a Credit Card Type

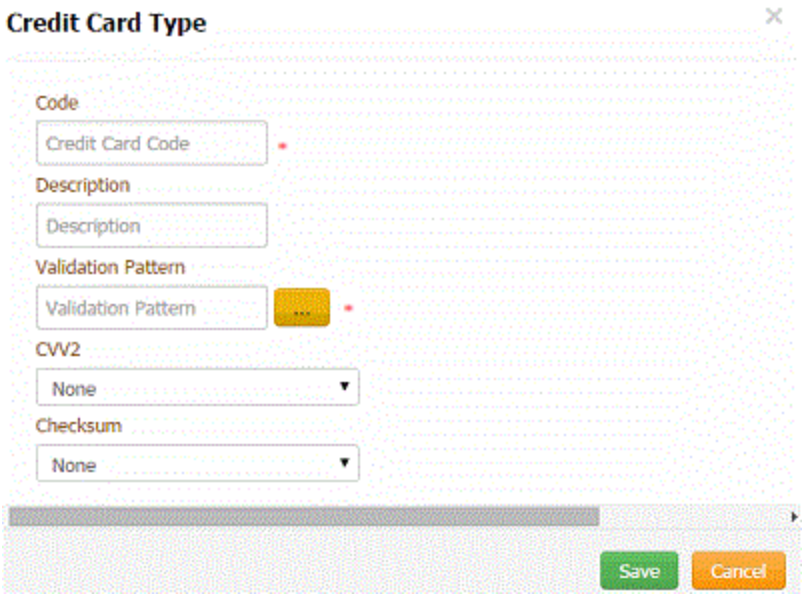
Use the **Credit Card Type** dialog box to add a credit card type.

To add a credit card type

1. In the **Navigation** pane, click **System Codes and Settings** > **Financial** > **Credit Card Type**.



2. Click the plus sign (+). The **Credit Card Type** dialog box appears.



Code: Unique code that identifies the credit card type.

Description: Commonly used name for the credit card type.

Validation Pattern: Expression used to identify the card. Click the ellipsis (**...**) and select a standard card type from the list.

CVV2: Indicates the location of the security code on the credit card.

Checksum: Formula to use to validate the credit card.

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

Related Topics

Search for a Permission or System Code

Data Grids

Credit Card Types

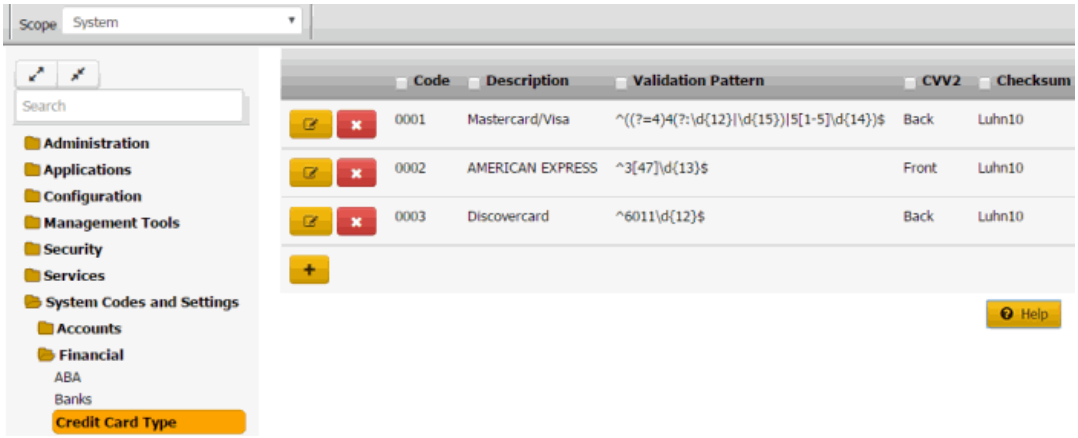
Feedback

Modify a Credit Card Type

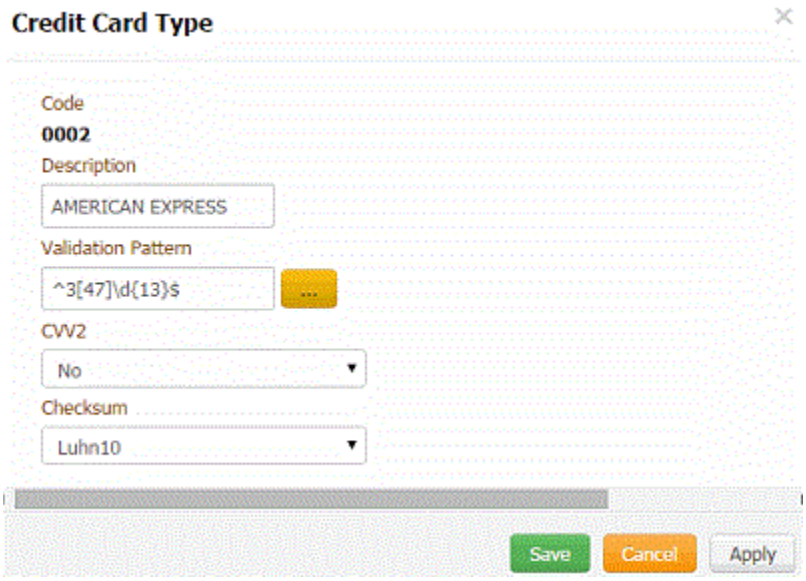
Use the **Credit Card Type** dialog box to modify a credit card type.

To modify a credit card type

1. In the **Navigation** pane, click **System Codes and Settings** > **Financial** > **Credit Card Type**.



2. Click the Edit icon. The **Credit Card Type** dialog box appears.



Code: Unique code that identifies the credit card type.

Description: Commonly used name for the credit card type.

Validation Pattern: Expression used to identify the card. Click the ellipsis (**...**) and select a standard card type from the list.

CVV2: Indicates the location of the security code on the credit card.

Checksum: Formula to use to validate the credit card.

3. Modify the information and then click **Save**.

Related Topics

Search for a Permission or System Code

Data Grids

Credit Card Types

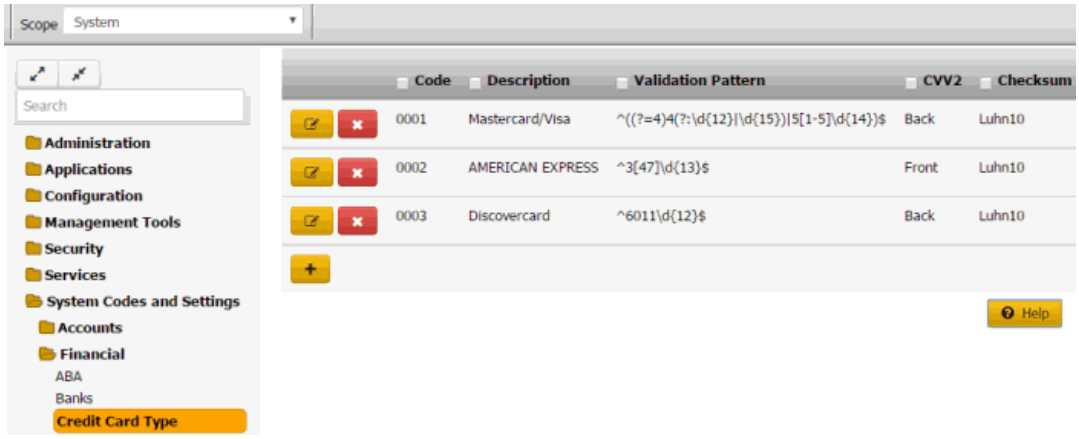
Feedback

Delete a Credit Card Type

Use the **Credit Card Type** panel to delete a credit card type.

To delete a credit card type

1. In the **Navigation** pane, click **System Codes and Settings** > **Financial** > **Credit Card Type**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Search for a Permission or System Code

Data Grids

Credit Card Types

Legal Ledger Types

Feedback

Legal Ledger Types

You can search for, add, modify, and delete legal ledger types. Legal ledger types allow your organization group legal accounting ledger entries. You specify whether transactions assigned to a type apply as debits or credits, and whether invoices include the transactions. Users specify a ledger type when adding a legal ledger item to a legal case. For more information, see Add a Legal Ledger Item.

Related Topics

Add a Legal Ledger Type

Modify a Legal Ledger Type

Delete a Legal Ledger Type

Search for a Permission or System Code

Data Grids

Financial Codes

[Add a Legal Ledger Item]

[Modify a Legal Ledger Item]

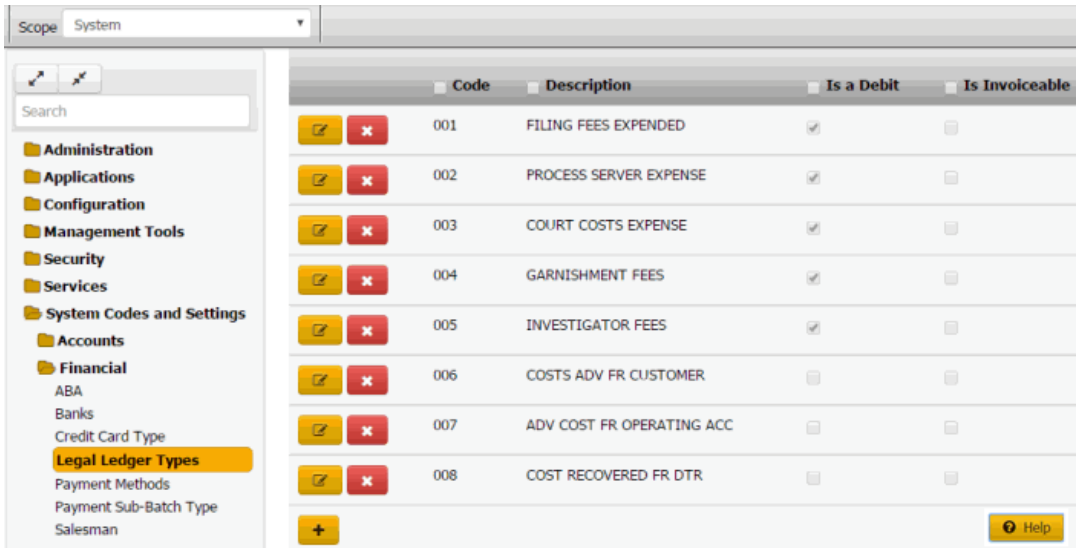
Feedback

Add a Legal Ledger Type

Use the **Legal Ledger Types** panel to add a legal ledger type.

To add a legal ledger type

1. In the **Navigation** pane, click **System Codes and Settings** > **Financial** > **Legal Ledger Types**.



2. Click the plus sign (+). A blank row appears in the data grid.

Code: Unique code that identifies the legal ledger type.

Description: Description of the legal ledger type.

Is a Debit: If selected, the legal ledger type represents a debit transaction. If cleared, transactions assigned to this legal ledger type apply as a credit. These transactions do not affect the account balances in Latitude.

Is Invoiceable: If selected, the legal ledger type represents a transaction that you can invoice. These transactions appear on a separate Exchange AIM invoice. These transactions do NOT appear on standard Latitude invoices.

3. Complete the information and then click the check mark.

Related Topics

Search for a Permission or System Code

Data Grids

Legal Ledger Types

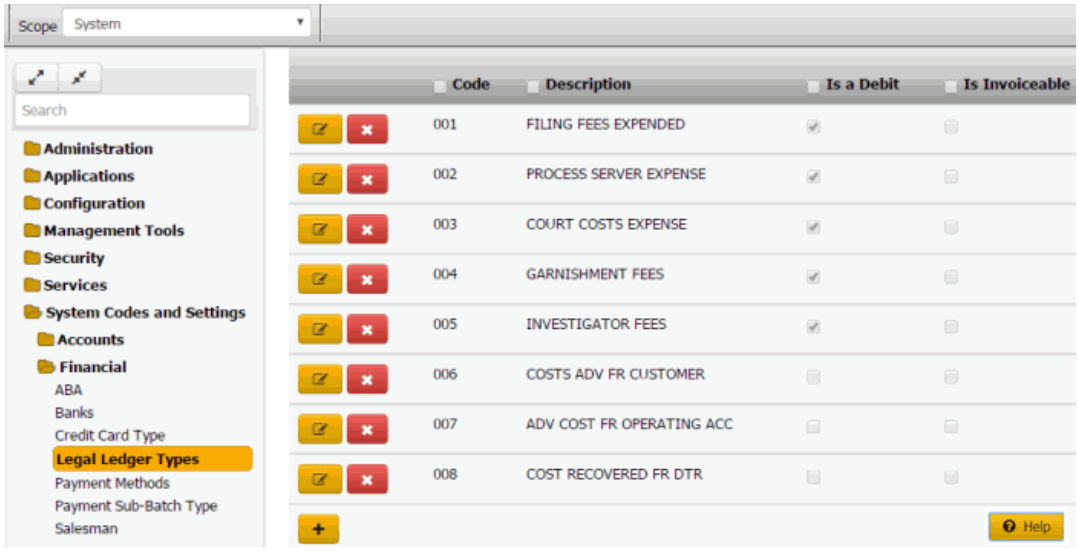
Feedback

Modify a Legal Ledger Type

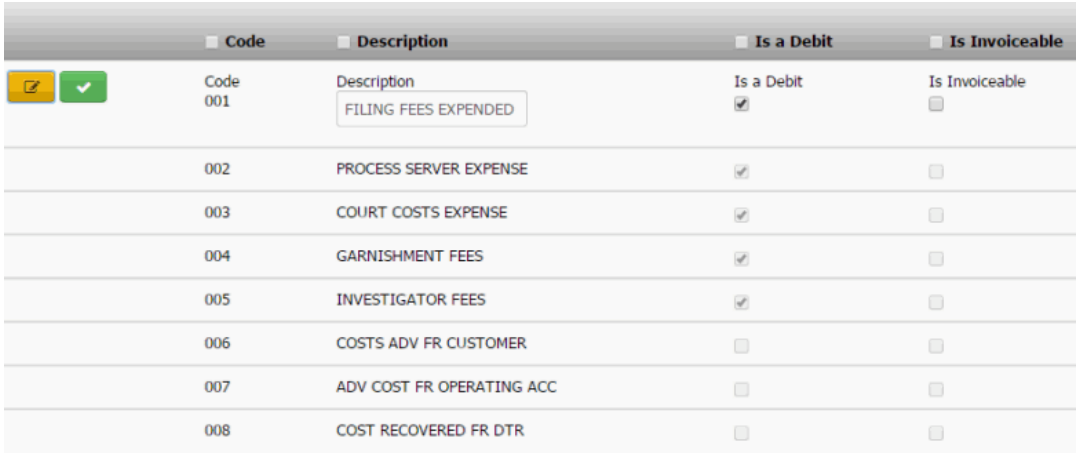
Use the **Legal Ledger Types** panel to modify a legal ledger type.

To modify a legal ledger type

1. In the **Navigation** pane, click **System Codes and Settings** > **Financial** > **Legal Ledger Types**.



2. Click the Edit icon. The legal ledger type appears in edit mode.



Code: Unique code that identifies the legal ledger type.

Description: Description of the legal ledger type.

Is a Debit: If selected, the legal ledger type represents a debit transaction. If cleared, transactions assigned to this legal ledger type apply as a credit. These transactions do not affect the account balances in Latitude.

Is Invoiceable: If selected, the legal ledger type represents a transaction that you can invoice. These transactions appear on a separate Exchange AIM invoice. These transactions do NOT appear on standard Latitude invoices.

3. Modify the information and then click the check mark.

Related Topics

Search for a Permission or System Code

Data Grids

Legal Ledger Types

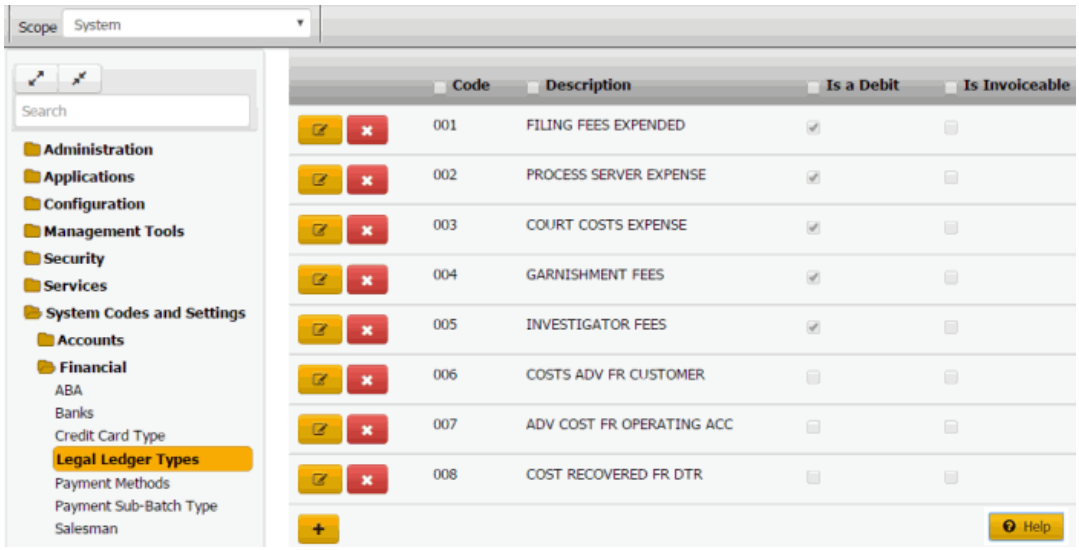
Feedback

Delete a Legal Ledger Type

Use the **Legal Ledger Types** panel to delete a legal ledger type.

To delete a legal ledger type

1. In the **Navigation** pane, click **System Codes and Settings** > **Financial** > **Legal Ledger Types**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Search for a Permission or System Code

Data Grids

Legal Ledger Types

Payment Methods

Feedback

Payment Methods

You can search for, add, and modify payment methods. Users specify a payment method when creating a payment arrangement. For more information, see Propose a Payment Arrangement. Latitude releases with several standard payment methods.

Related Topics

Add a Payment Method

Modify a Payment Method

Search for a Permission or System Code

Data Grids

Financial Codes

Propose a Payment Arrangement

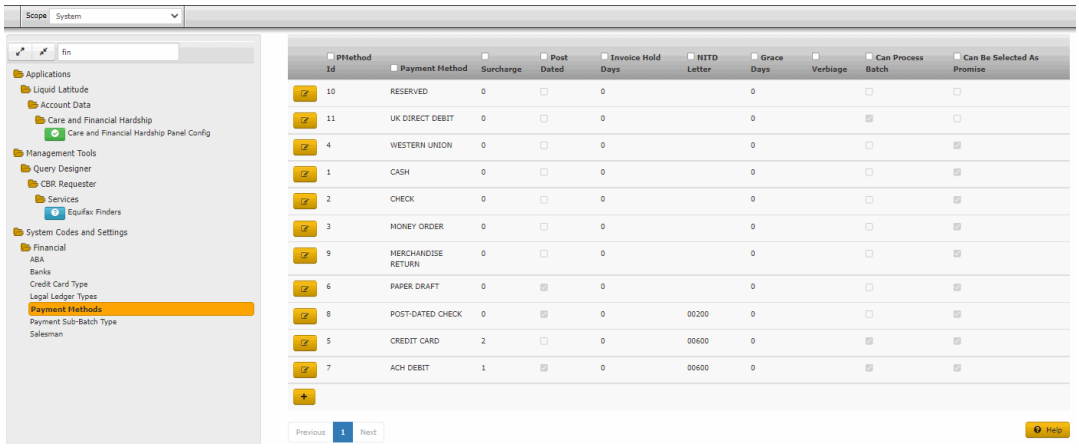
Feedback

Add a Payment Method

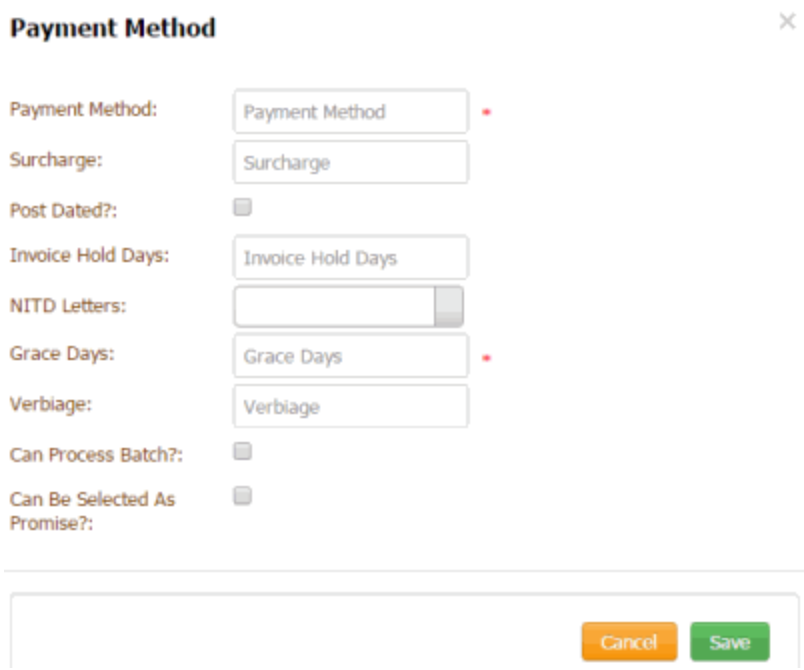
Use the **Payment Method** dialog box to add a payment method.

To add a payment method

1. In the **Navigation** pane, click **System Codes and Settings** > **Financial** > **Payment Methods**.



2. Click the plus sign (+).



Payment Method: Means of payment in a payment arrangement.

Surcharge: Amount your organization adds to the account for payments received using this payment method (not applicable for MA accounts). Latitude adds this amount to bucket 10 when users add a payment to an account. For more information, see Surcharge Rules.

Surcharge Percent: Percentage your organization adds to the account for payments received using this payment method (not applicable for MA accounts). Latitude adds this money to bucket 10 when users add a payment.

Post Dated?: If selected, this payment method is a post-dated entry. This option is available when adding post-dated check information for an account.

Invoice Hold Days: Number of days to wait before posting payments received to the client's invoice using this payment method.

NITD Letters: Notice of Intent to Deposit letters. Code that identifies the letter to generate when users add payments using this method. The letters available are based on the letters your organization configured using Letter Console.

Calc Surcharge From Gross?: If selected, Latitude calculates the surcharge percentage based on the gross payment amount.

Grace Days: Maximum number of days after the payment due date that the customer can submit a payment before the payment is considered late.

Verbiage: Text to display to the user when using this payment method in a payment arrangement.

Can Process Batch?: If selected, this payment method is available for selection as a batch type when processing payment batches using the Batch Processor.

Can Be Selected as Promise?: If selected, this payment method is available for selection when scheduling a payment promise.

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

Related Topics

Search for a Permission or System Code

Data Grids

Surcharge Rules

Payment Methods

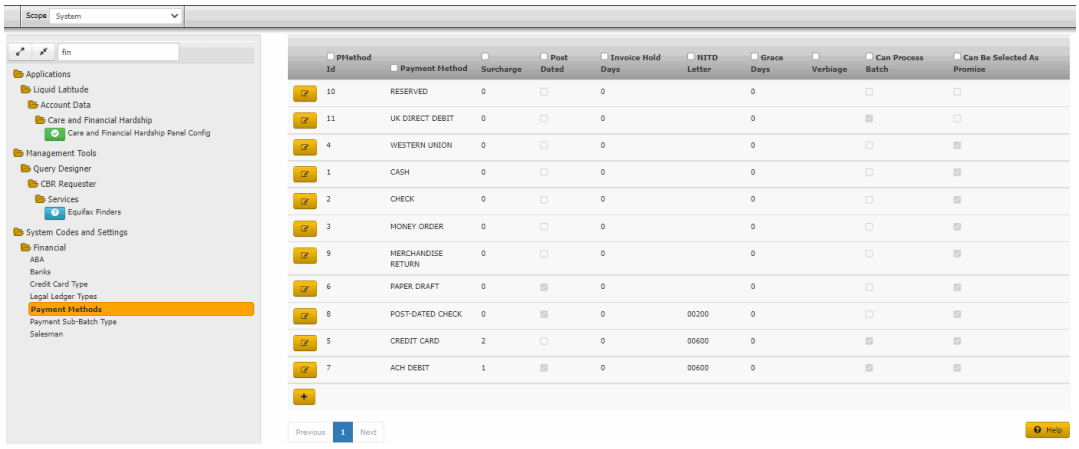
Feedback

Modify a Payment Method

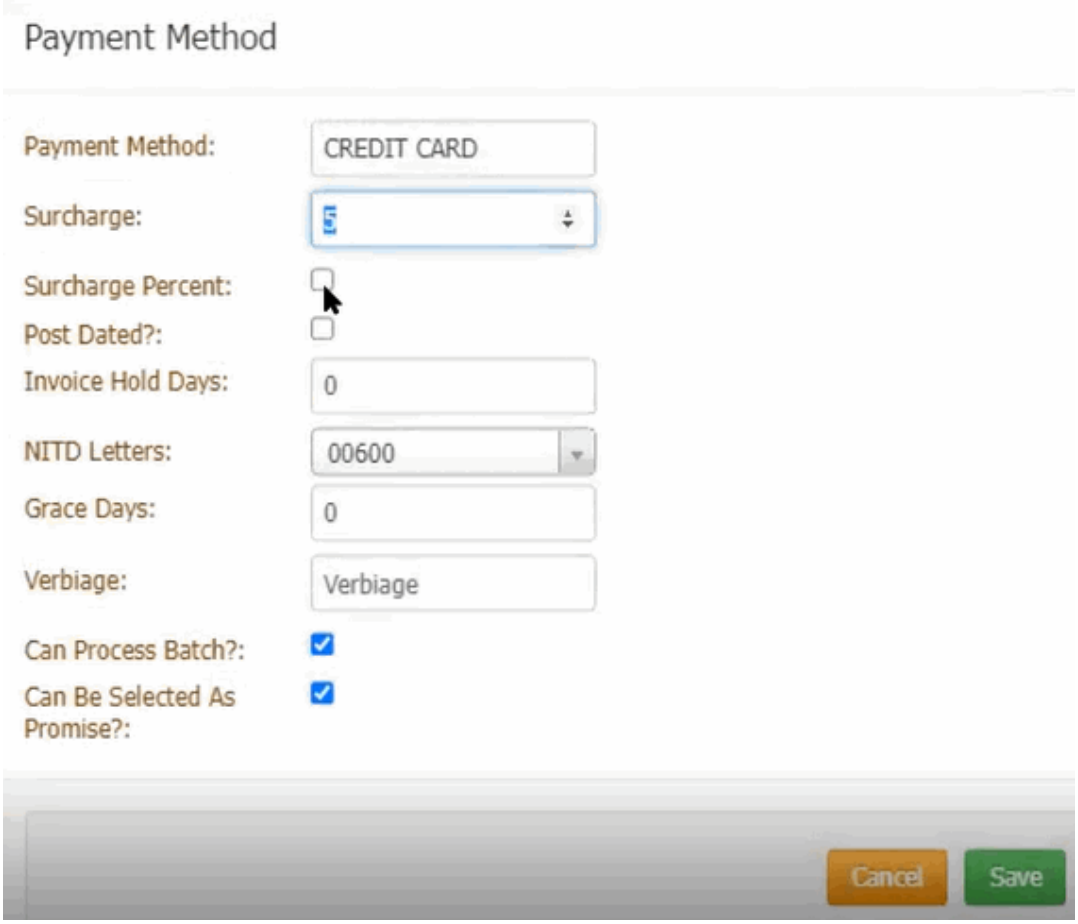
Use the **Payment Method** dialog box to modify a payment method.

To modify a payment method

1. In the **Navigation** pane, click **System Codes and Settings** > **Financial** > **Payment Methods**.



2. Click the Edit icon.



Payment Method: Means of payment in a payment arrangement.

Surcharge: Amount your organization adds to the account for payments received using this payment method (not applicable for MA accounts). Latitude adds this amount to bucket 10 when users add a payment to an account.

Surcharge Percent: If the Percent check box is checked system will consider the value given in surcharge field as percentage. This will reflect surcharge amount in arrangements screen.

Post Dated?: If selected, this payment method is a post-dated entry. This option is available when adding post-dated check information for an account.

Invoice Hold Days: Number of days to wait before posting payments received to the client's invoice using this payment method.

NITD Letters: Notice of Intent to Deposit letters. Code that identifies the letter to generate when users add payments using this method. The letters available are based on the letters your organization configured using Letter Console.

Calc Surcharge From Gross?: If selected, Latitude calculates the surcharge percentage based on the gross payment amount.

Grace Days: Maximum number of days after the actual payment due date that the customer can submit a payment before the payment is considered late.

Verbiage: Text to display to the user when using this payment method in a payment arrangement.

Can Process Batch?: If selected, this payment method is available for selection as a batch type when processing payment batches using the Batch Processor.

Can Be Selected as Promise?: If selected, this payment method is available for selection when scheduling a payment promise.

3. Modify the information and then click **Save**.

Related Topics

Search for a Permission or System Code

Data Grids

Payment Methods

Payment Sub-Batch Types

Payment Sub-Batch Types

You can search for, add, modify, and delete payment sub-batch types. Sub-batches allow you to further categorize payment types.

Related Topics

Add a Payment Sub-Batch Type

Modify a Payment Sub-Batch Type

Delete a Payment Sub-Batch Type

Search for a Permission or System Code

Data Grids

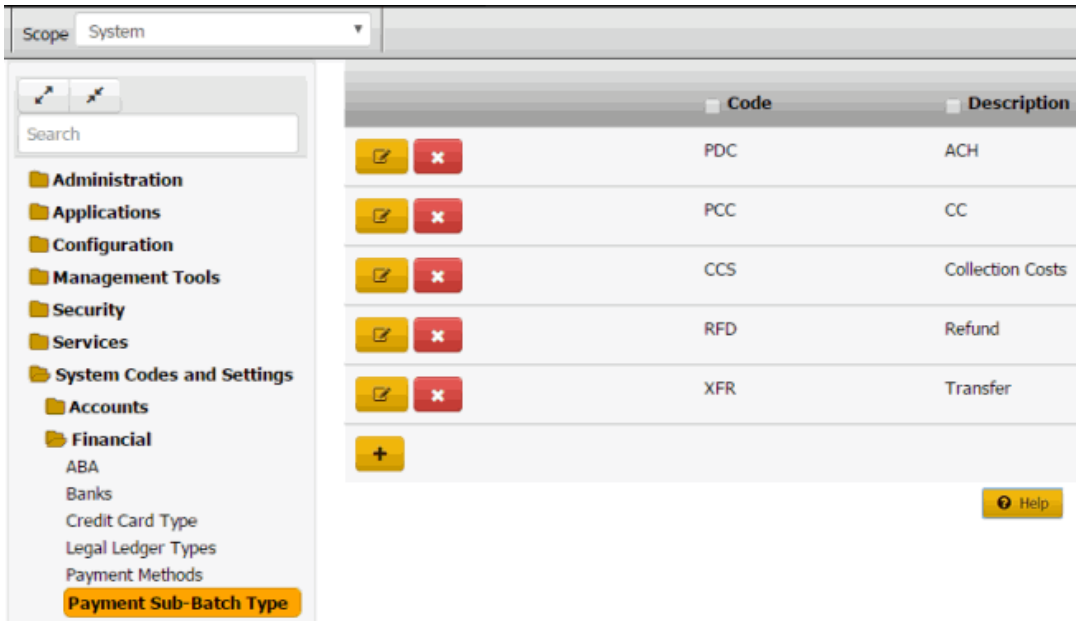
Financial Codes

Add a Payment Sub-Batch Type

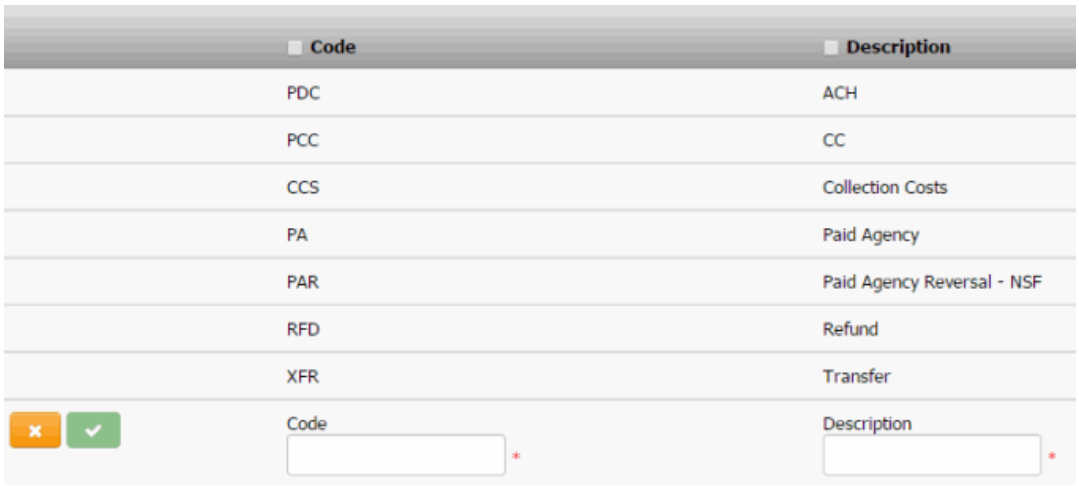
Use the **Payment Sub-Batch Type** panel to add a payment sub-batch type.

To add a payment sub-batch type

1. In the **Navigation** pane, click **System Codes and Settings** > **Financial** > **Payment Sub-Batch Type**.



2. Click the plus sign (+). A blank row appears in the data grid.



Code: Unique three-character code that identifies the payment sub-batch.

Description: Description of the payment sub-batch.

3. Complete the information and then click the check mark.

Related Topics

Search for a Permission or System Code

Data Grids

Payment Sub-Batch Types

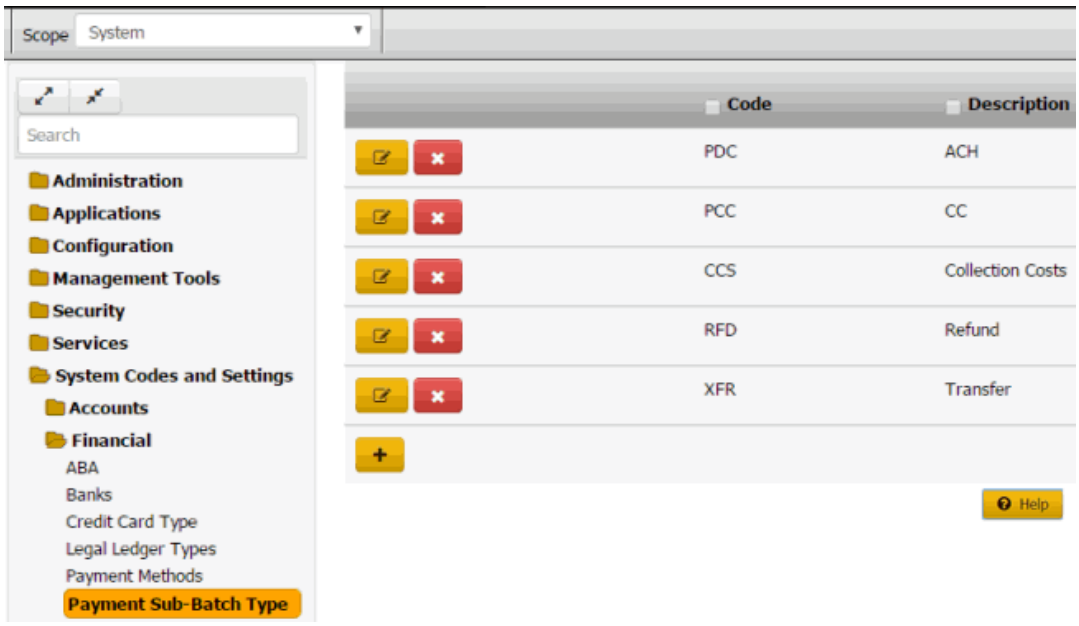
Feedback

Modify a Payment Sub-Batch Type

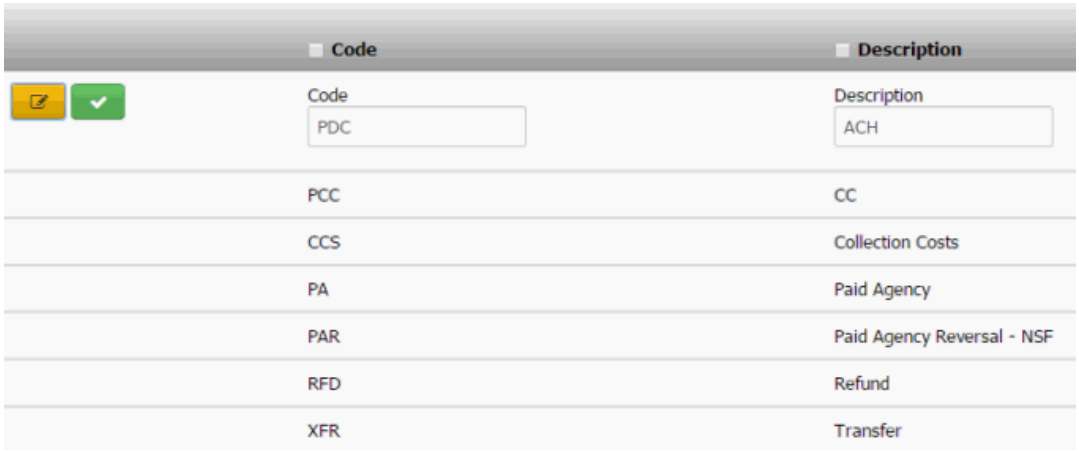
Use the **Payment Sub-Batch Type** panel to modify a payment sub-batch type.

To modify a payment sub-batch type

1. In the **Navigation** pane, click **System Codes and Settings** > **Financial** > **Payment Sub-Batch Type**.



2. Click the Edit icon. The payment sub-batch appears in edit mode.



Code: Unique three-character code that identifies the payment sub-batch.

Description: Description of the payment sub-batch.

3. Modify the information and then click the check mark.

Related Topics

Search for a Permission or System Code

Data Grids

Payment Sub-Batch Types

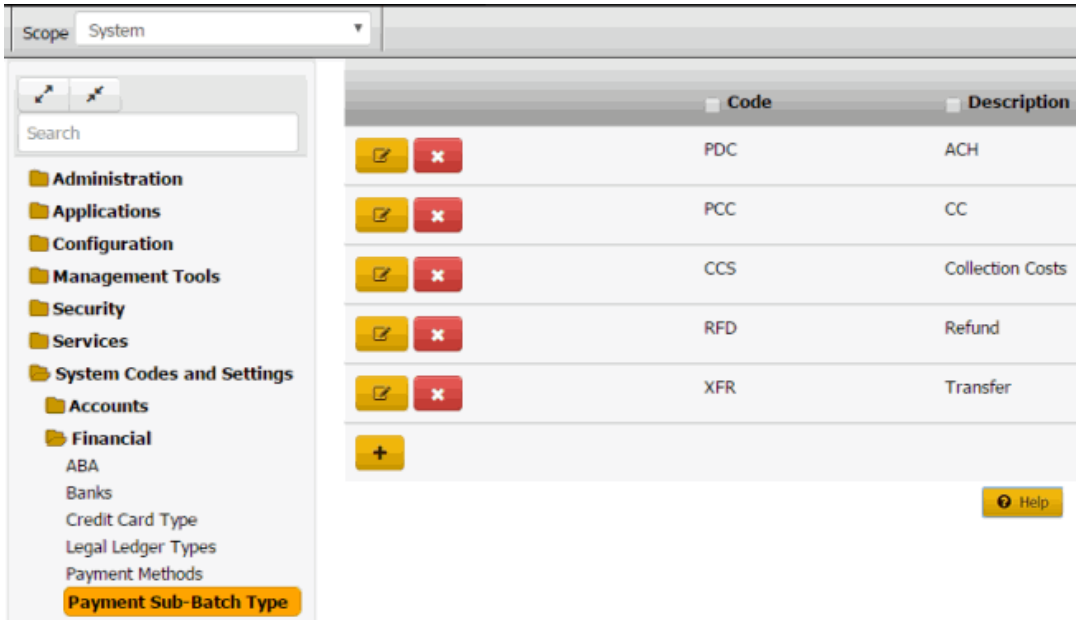
Feedback

Delete a Payment Sub-Batch Type

Use the **Payment Sub-Batch Type** panel to delete a payment sub-batch type.

To delete a payment sub-batch type

1. In the **Navigation** pane, click **System Codes and Settings** > **Financial** > **Payment Sub-Batch Type**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Search for a Permission or System Code

Data Grids

Payment Sub-Batch Types

Salesman Codes

Feedback

Salesman Codes

You can search for, add, modify, and delete salesmen. Users can assign an individual salesman to each client to track the number and value of accounts placed. The system also tracks the money collected and fees placed against accounts for each salesman in an office. For more information, see Maintain Client Account Information.

Related Topics

Add a Salesman

Modify a Salesman

Delete a Salesman

Search for a Permission or System Code

Data Grids

Financial Codes

Maintain Client Account Information

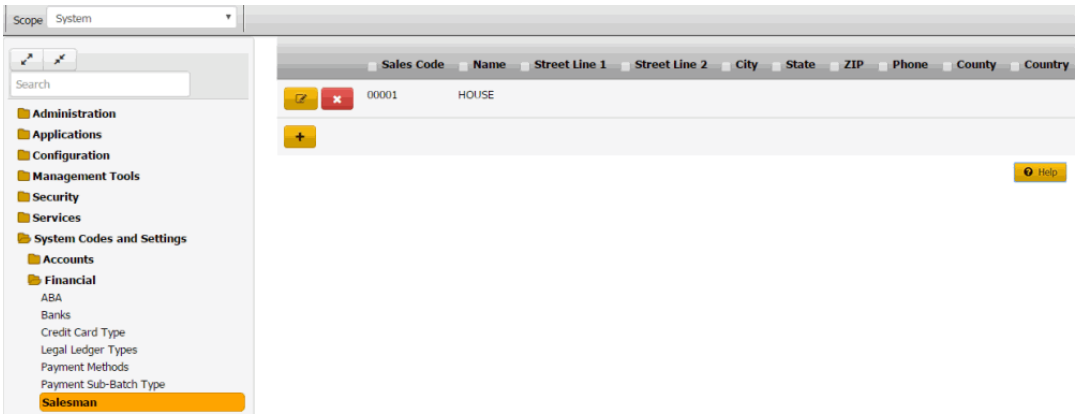
Feedback

Add a Salesman

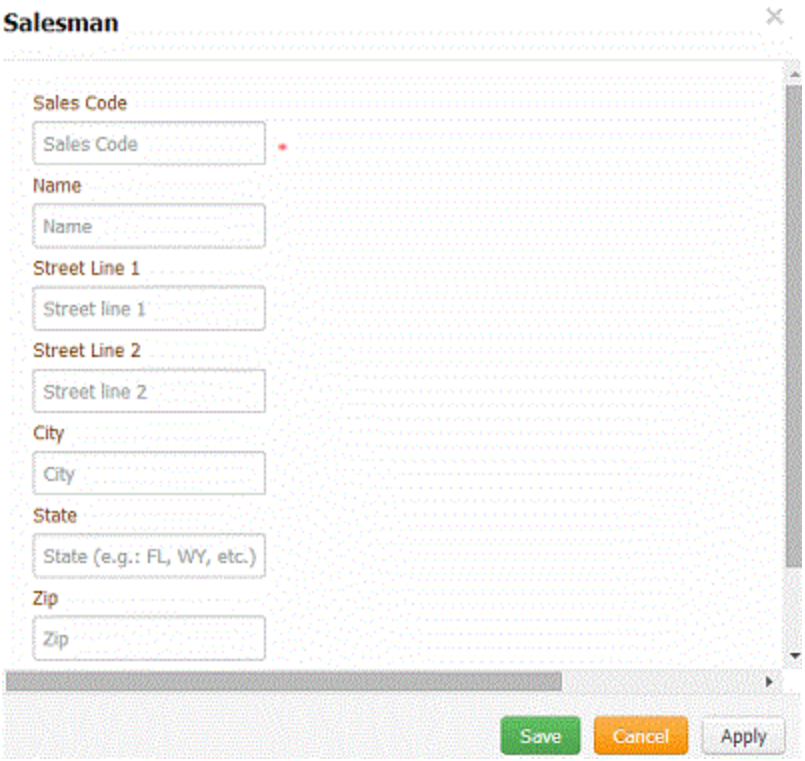
Use the **Salesman** dialog box to add a sales person.

To add a salesman

1. In the **Navigation** pane, click **System Codes and Settings** > **Financial** > **Salesman**.



2. Click the plus sign (+). The **Salesman** dialog box appears.



Sales Code: Unique code that identifies the sales person.

Name: Sales person's full name, including first name, last name, and suffix.

Street Line 1: First line of the sales person's street address.

Street Line 2: Second line of the sales person's street address.

City: Sales person's city.

State: Sales person's state.

ZIP: Sales person's postal code.

Phone: Sales person's phone number, including area code.

County: Sales person's county.

Country: Sales person's country.

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

Related Topics

Search for a Permission or System Code

Data Grids

Salesman

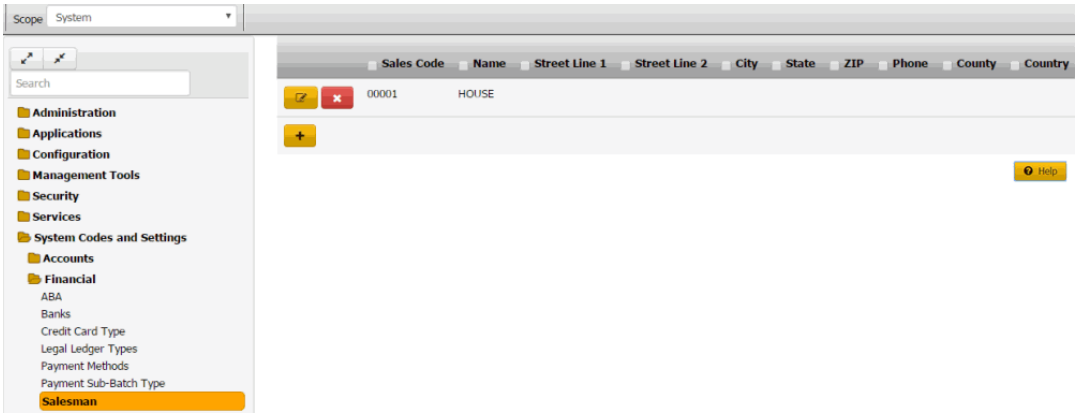
Feedback

Modify a Salesman

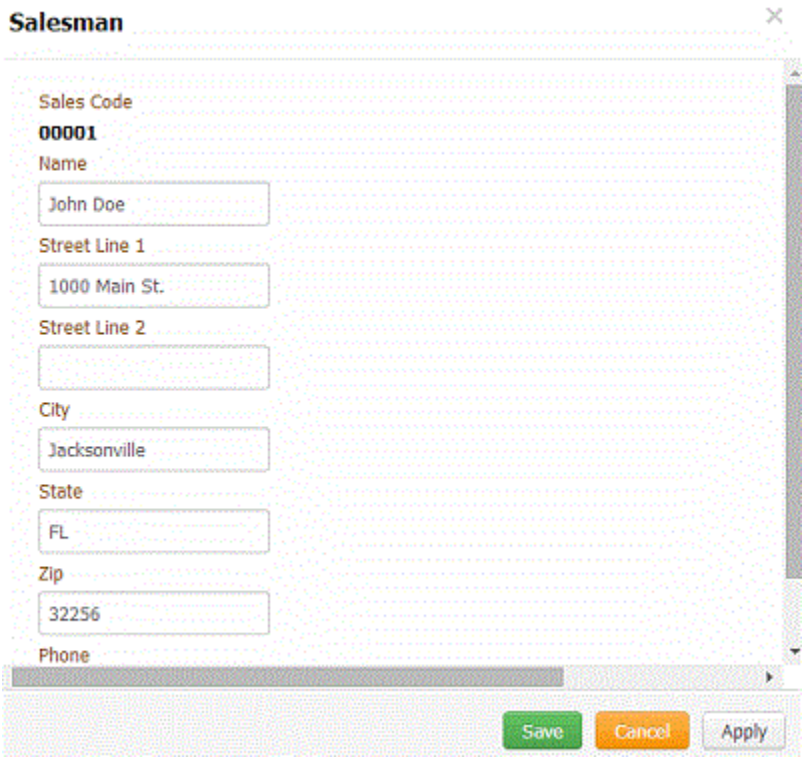
Use the **Salesman** dialog box to modify a sales person.

To modify a salesman

1. In the **Navigation** pane, click **System Codes and Settings** > **Financial** > **Salesman**.



2. Click the Edit icon. The **Salesman** dialog box appears.



3. Modify the information and then click **Save**.

Related Topics

Search for a Permission or System Code

Data Grids

Salesman

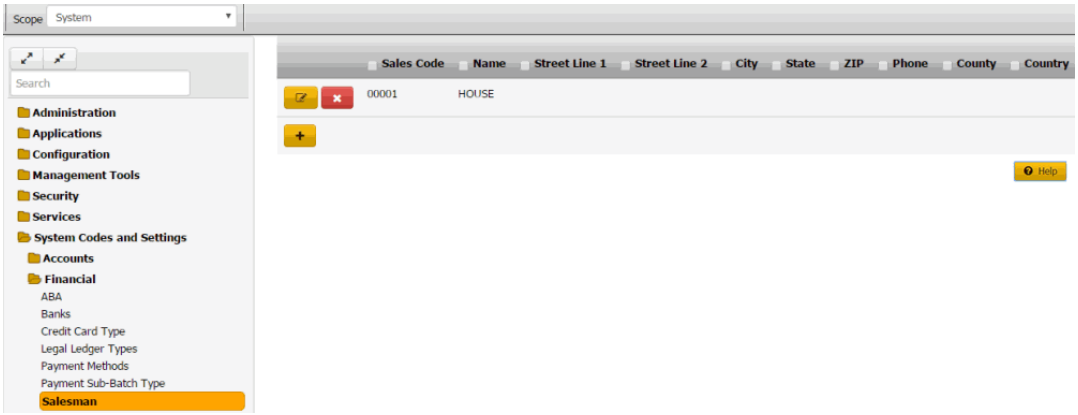
Feedback

Delete a Salesman

Use the **Salesman** panel to delete a sales person.

To delete a salesman

1. In the **Navigation** pane, click **System Codes and Settings** > **Financial** > **Salesman**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Search for a Permission or System Code

Data Grids

Salesman

Surcharge Type

Surcharge Type

You can search for, add and modify Surcharge Type.

Related Topics

Add Surcharge Type

Modify Surcharge Type

Search for a Permission or System Code

Data Grids

Financial Codes

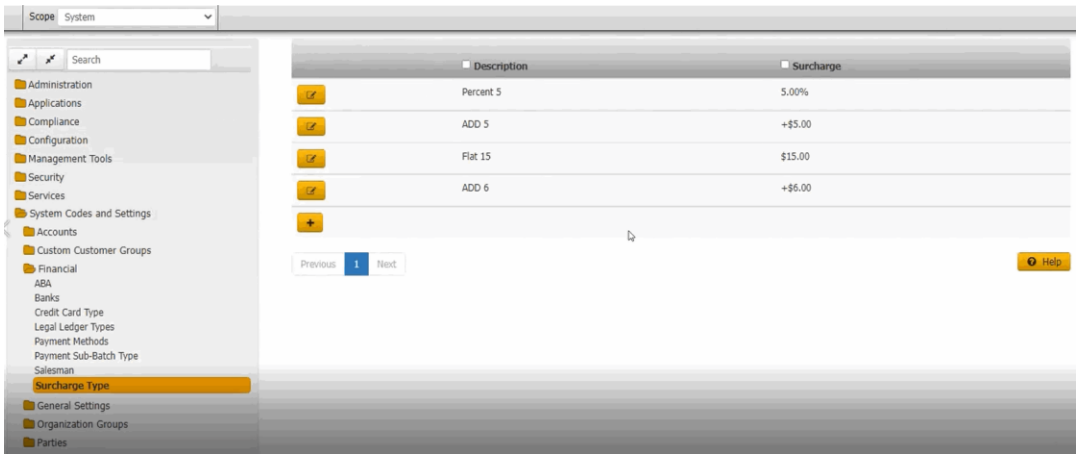
Maintain Client Account Information

Add Surcharge Type

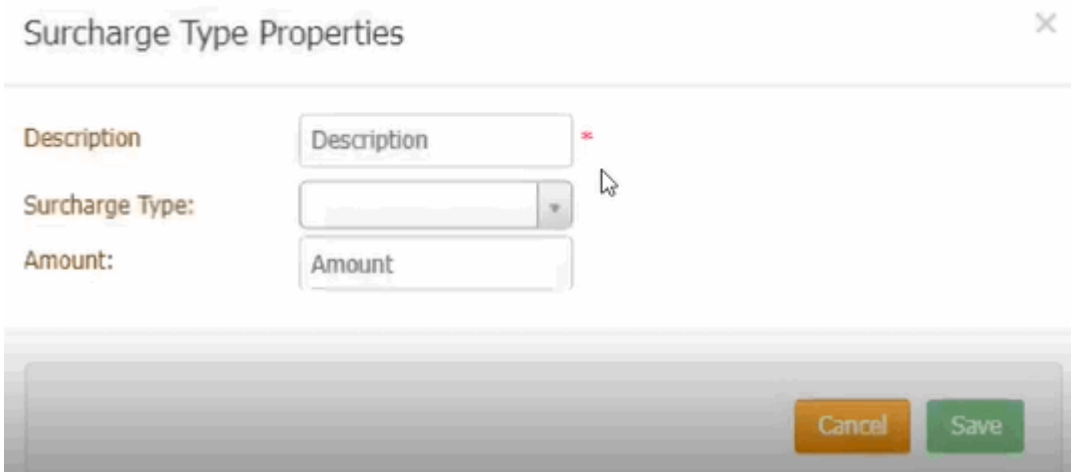
Use the Surcharge Type Properties dialog box to add surcharge type and their associated dollar or percent amounts.

To add a surcharge type

1. In the **Navigation** pane, click **System Codes and Settings** > **Financial Codes** > **Surcharge Type**.



2. To add a surcharge type, Click the plus sign (+). The **Surcharge Type Properties** dialog box appears without any values.



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

Related Topics

Search for a Permission or System Code

Data Grids

Surcharge Type

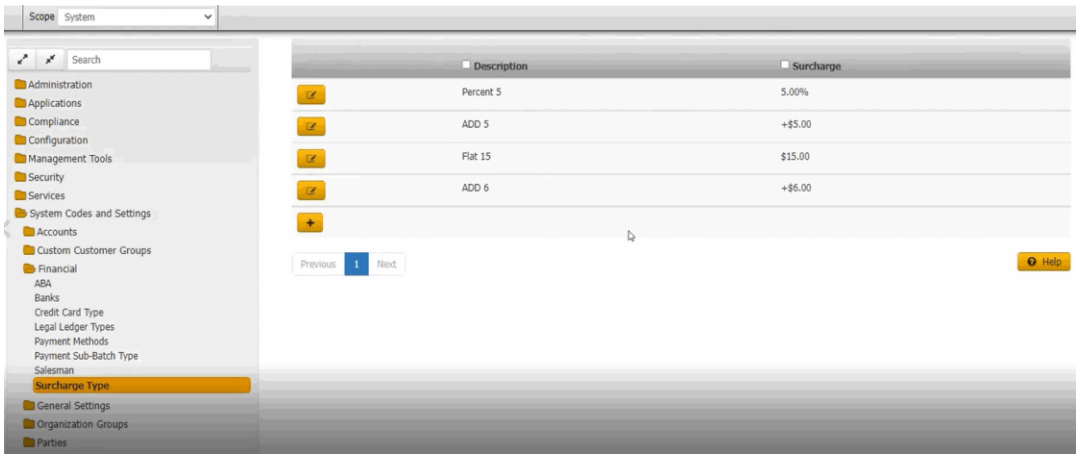
Modify Surcharge Type

Modify Surcharge Type

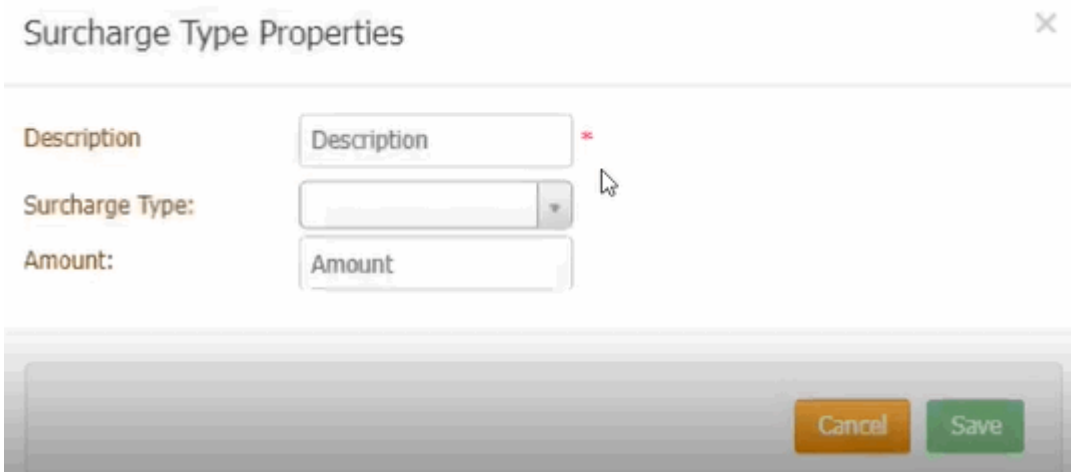
Use the Surcharge Type Properties dialog box to modify surcharge type and their associated dollar or percent amounts.

To modify a surcharge type

1. In the **Navigation** pane, click **System Codes and Settings** > **Financial Codes** > **Surcharge Type**.



2. To modify a surcharge type, click the Edit icon. The **Surcharge Type Properties** dialog box appears.



3. Modify the information and then click **OK**.

Related Topics

Search for a Permission or System Code

Data Grids

Surcharge Type

Add Surcharge Type

General Settings

Feedback

General Settings

You can set up and configure law lists and state restrictions.

Related Topics

Law Lists

State Restriction

Holidays

Holidays

You can search for, add, modify, and delete holidays for the arrangements of payments consideration.

Related Topics

Add a Holiday

Modify a Holiday

Delete a Holiday

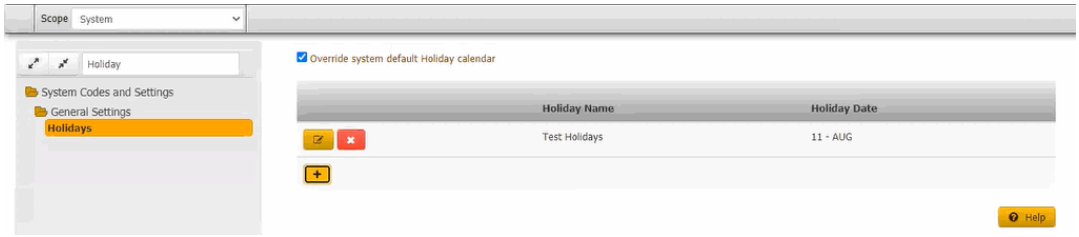
Add a Holidays

Use the **Holidays** dialog box to add a new Holidays.

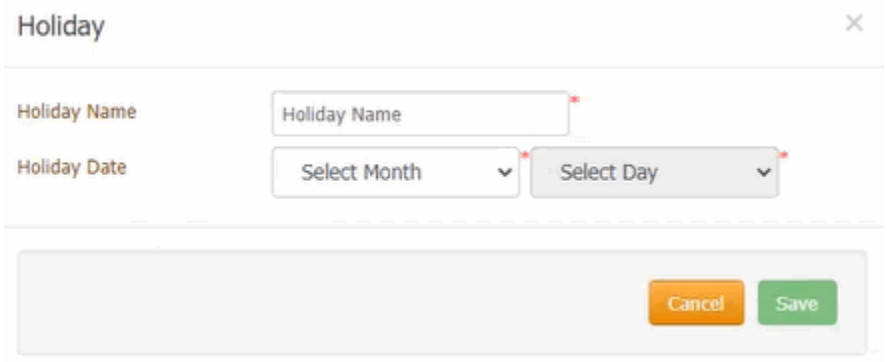
To add a Holidays

1. In the **Navigation** pane, click **System Codes and Settings** > **General Settings** > **Holidays**.
2. Select **Override system default Holiday Calendar** check box to remove the default system generated holidays.

   Note: If you clear the **Override system default Holiday Calendar** check box after adding the holidays, then the system generated holidays will be considered as default.



2. Click the plus sign (+). The **Holidays** dialog box appears.



   Holiday Name: Description or name of the Holiday.

   Holiday Date: Month and Day.

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

Related Topics

Search for a Permission or System Code

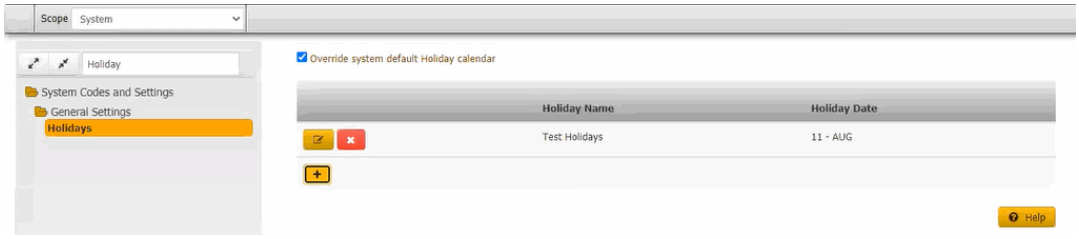
Data Grids

Modify a Holiday

Use the **Holiday** dialog box to modify an existing Holiday listed.

To modify a Holiday

1. In the **Navigation** pane, click **System Codes and Settings** > **General Settings** > **Holiday**.



2. Click the Edit icon. The **Holidays** dialog box appears.

   Holiday Name: Description or name of the Holiday.

   Holiday Date: Month and Day.

3. Modify the information and then click **Save**.

Related Topics

Search for a Permission or System Code

Data Grids

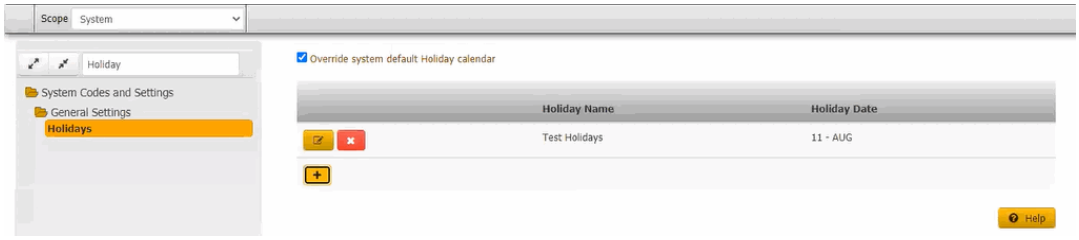
Holidays

Delete a Holiday

Use the **Holiday** panel to delete a Holiday.

To delete a Holiday

1. In the **Navigation** pane, click **System Codes and Settings** > **General Settings** > **Holidays**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Search for a Permission or System Code

Data Grids

Holidays

Law Lists

Feedback

Law Lists

You can search for, add, modify, and delete law lists that your organization references when seeking the services of a collection attorney.

Related Topics

Add a Law List

Modify a Law List

Delete a Law List

Search for a Permission or System Code

Data Grids

General Settings

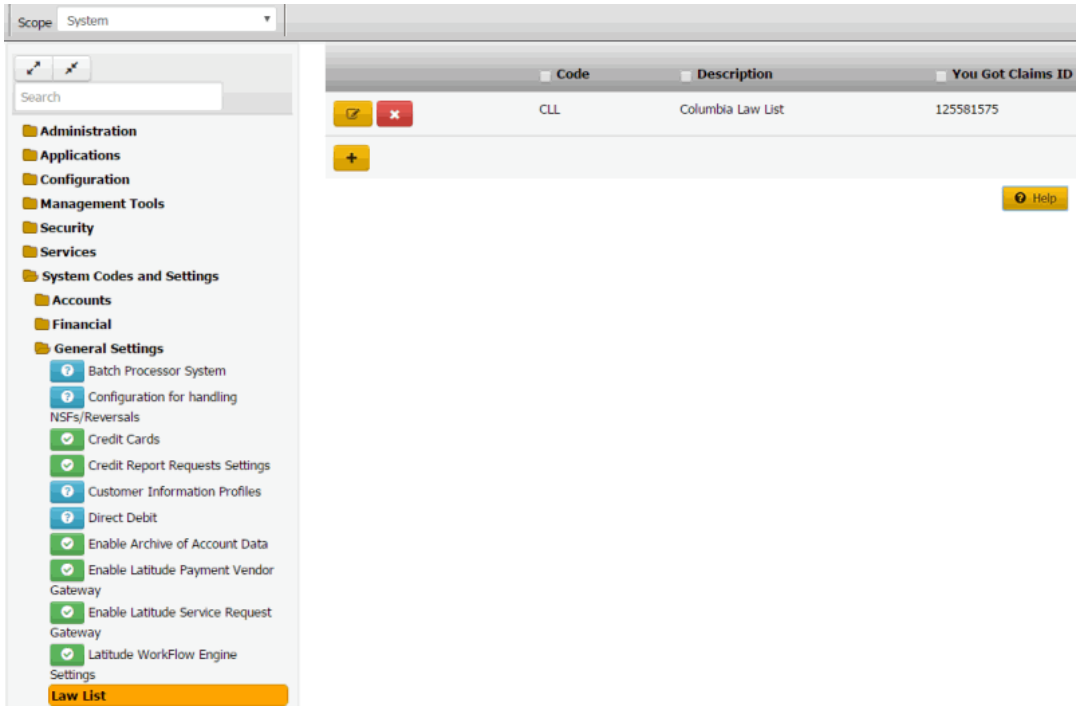
Feedback

Add a Law List

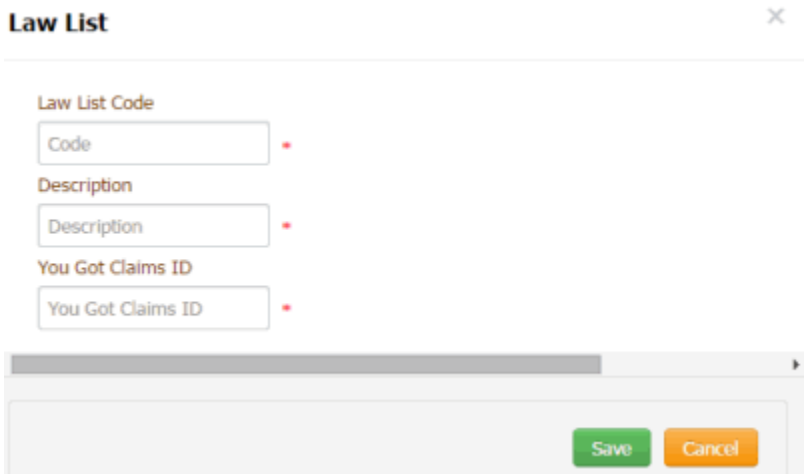
Use the **Law List** dialog box to add a law list code.

To add a law list

1. In the **Navigation** pane, click **System Codes and Settings** > **General Settings** > **Law List**.



2. Click the plus sign (+). The **Law List** dialog box appears.



Law List Code: Code that identifies the law list.

Description: Description or name of the law list.

You Got Claims ID: You've Got Claims identifier.

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

Related Topics

Search for a Permission or System Code

Data Grids

Law Lists

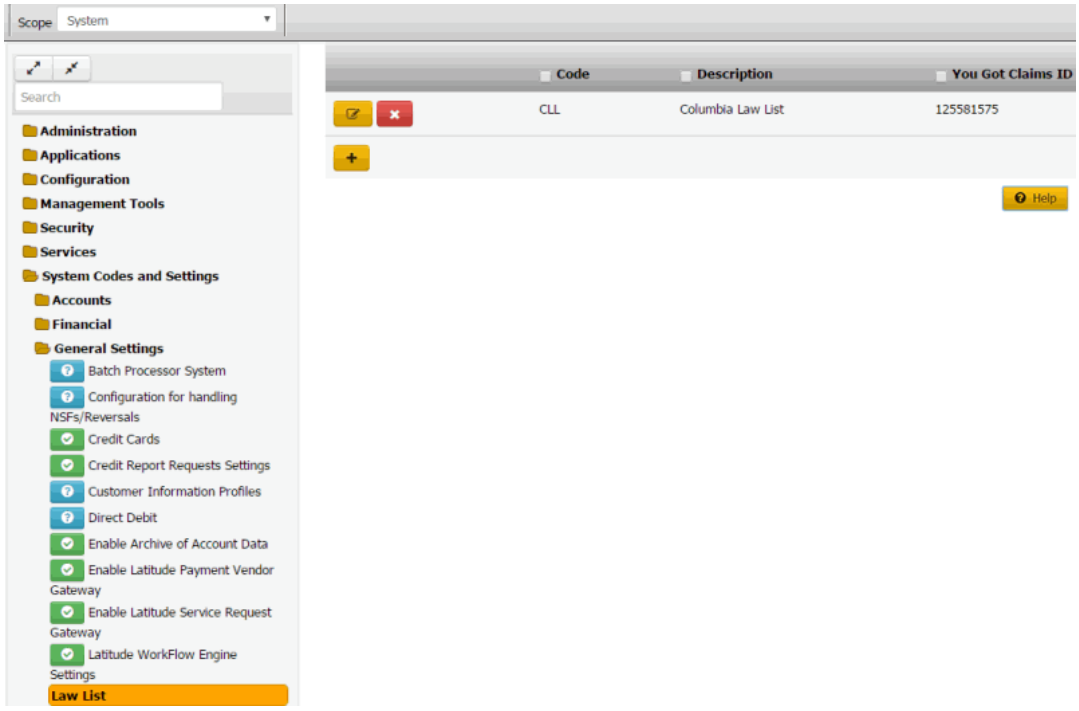
Feedback

Modify a Law List

Use the **Law List** dialog box to modify a law list code.

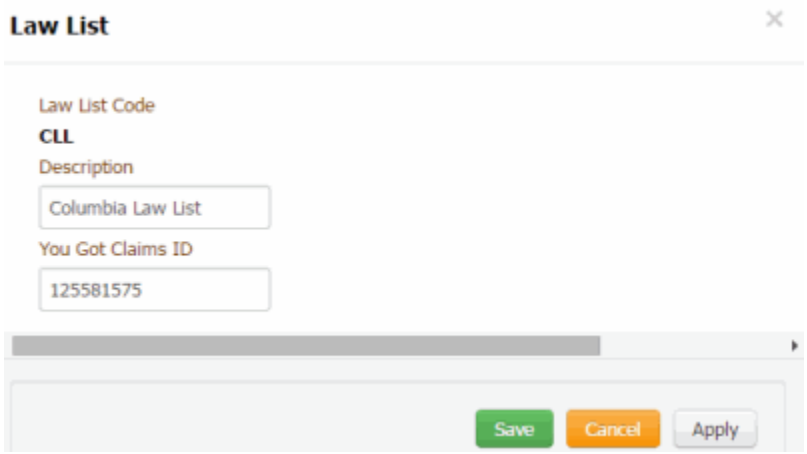
To modify a law list

1. In the **Navigation** pane, click **System Codes and Settings** > **General Settings** > **Law List**.



You Got Claims ID: You've Got Claims identifier.

2. Click the Edit icon. The **Law List** dialog box appears.



Law List Code: Code that identifies the law list.

Description: Description or name of the law list.

You Got Claims ID: You've Got Claims identifier.

3. Modify the information and then click **Save**.

Related Topics

Search for a Permission or System Code

Data Grids

Law Lists

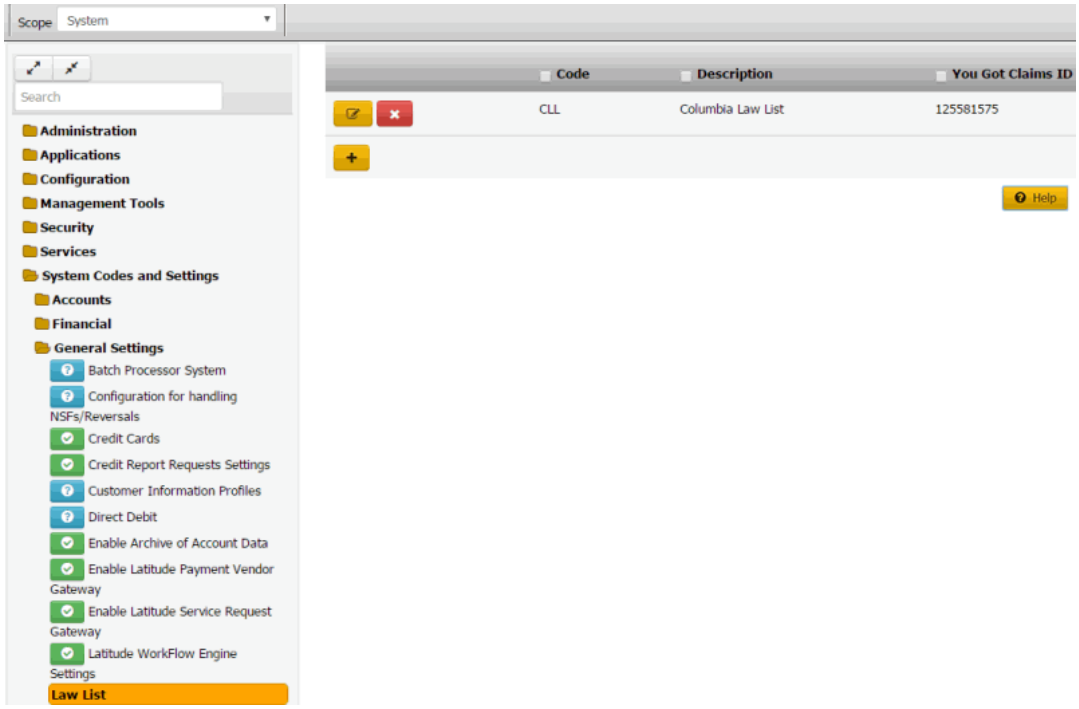
Feedback

Delete a Law List

Use the **Law List** panel to delete a law list code.

To delete a law list code

1. In the **Navigation** pane, click **System Codes and Settings** > **General Settings** > **Law List**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Search for a Permission or System Code

Data Grids

Law Lists

State Restriction

Feedback

State Restriction

You can add and modify state restrictions that control how the system handles accounts within specific states. For example, letter restrictions, printed advisories, warnings, and surcharges.

Related Topics

Add a State Restriction

[Modify a State Restriction]

[Search for a Permission or System Code]

[Data Grids]

[General Settings]

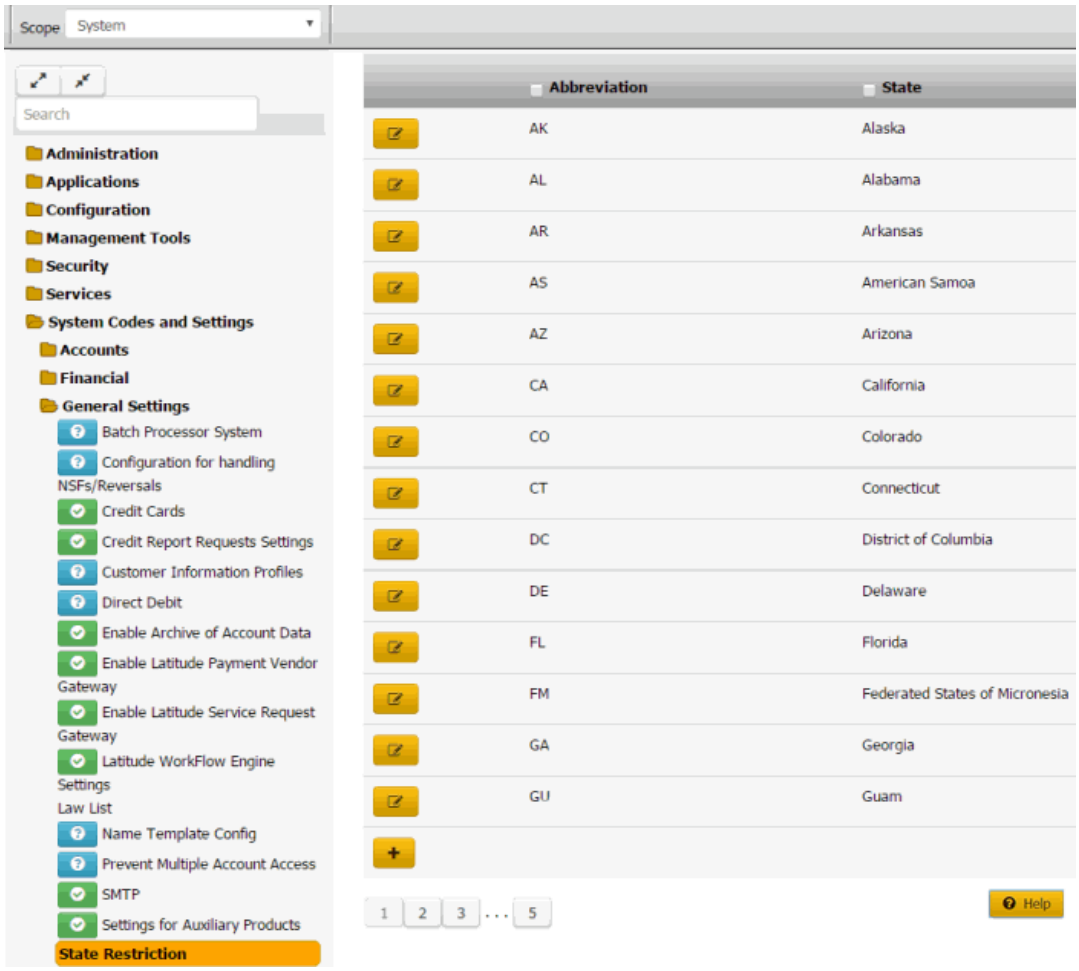
[Surcharge Rules]

Add a State Restriction

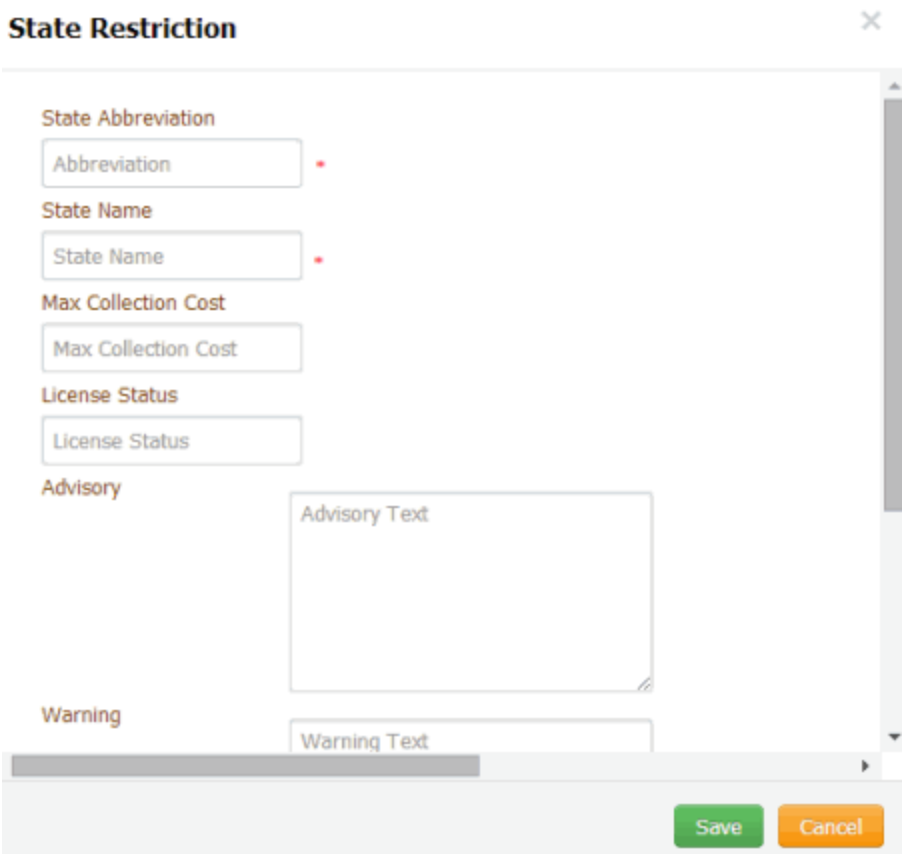
Use the **State Restriction** dialog box to add a state restriction.

To add a state restriction

1. In the **Navigation** pane, click **System Codes and Settings** > **General Settings** > **State Restriction**.



2. Click the plus sign (+). The **State Restriction** dialog box appears.



State Abbreviation: Unique code that identifies the state.

State Name: Full name of the state.

Max Collection Cost: Maximum collection cost percent the state allows. You can configure the client record to allow agents to override this percent for customers residing in the state.

License Status: Optional place to store licensing information.

Advisory: Advisory information to print on letters for customers residing in the state. The system inserts this information in letters when you include the **State_Legal_Advisory** merge field in the letter body.

Warning: Warning information to display in the **Warnings** dialog box for customers residing in the state.

Restrict Letters: If selected, the state restricts the letters you can send to customers residing in the state.

Permit a Wage Garnishment: If selected, the state allows administrative wage garnishment.

Permit Surcharge: If selected, the state allows collection of surcharges for customers residing in the state. If cleared, the surcharge option isn't available when creating payment arrangements.

Settlement Adjustment: If selected, settlement adjustment box appears to add the positive or negative values. (This value will affect the settlement amount in arrangement screen)

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

Related Topics

Search for a Permission or System Code

Data Grids

State Restriction

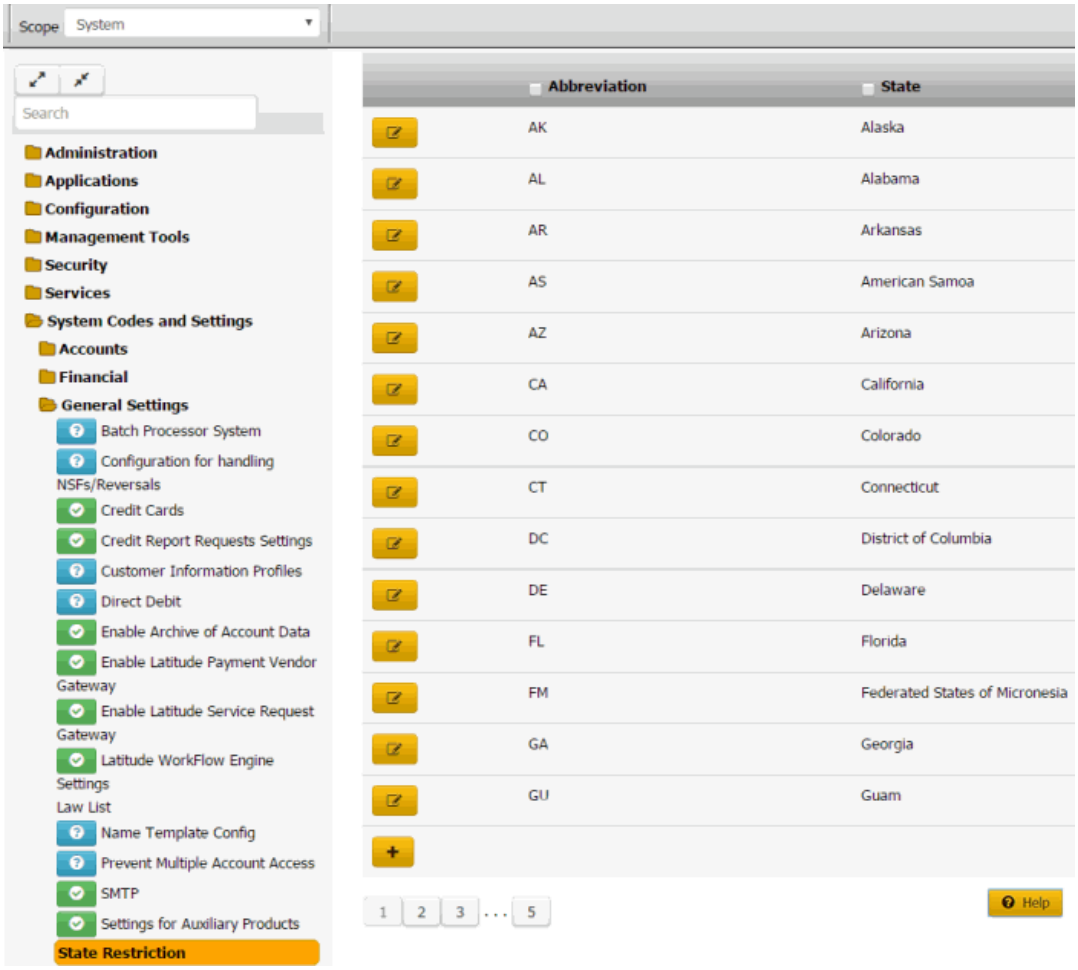
Feedback

Modify a State Restriction

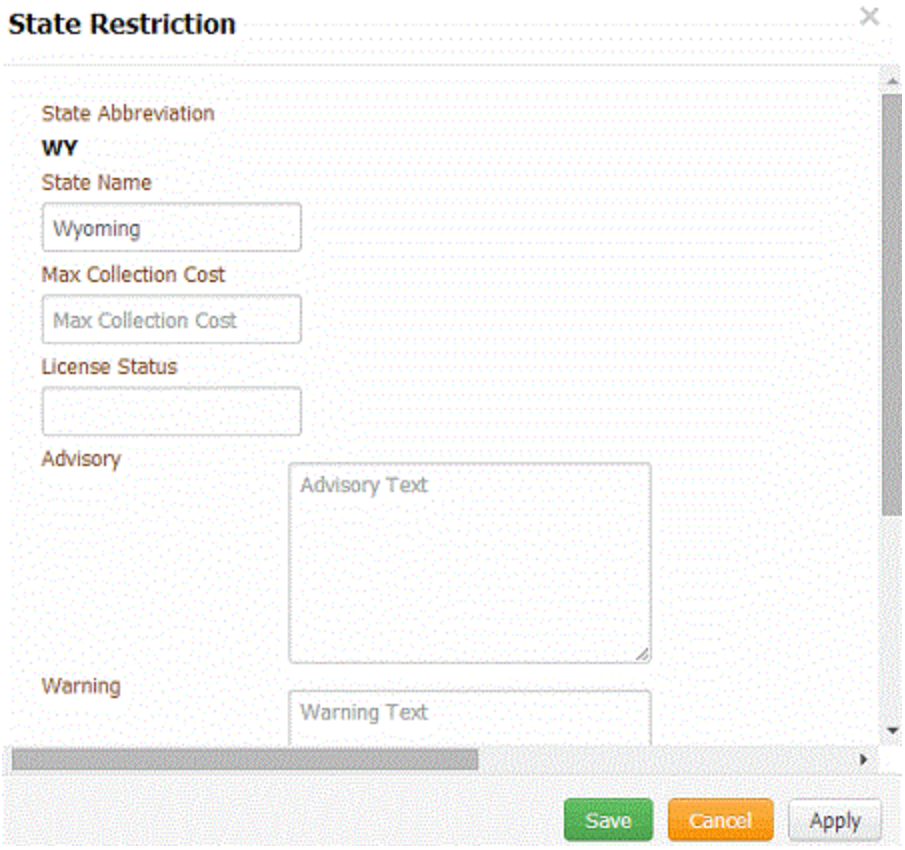
Use the **State Restriction** dialog box to modify a state restriction.

To modify a state restriction

1. In the **Navigation** pane, click **System Codes and Settings** > **General Settings** > **State Restriction**.



2. Click the Edit icon. The **State Restriction** dialog box appears.



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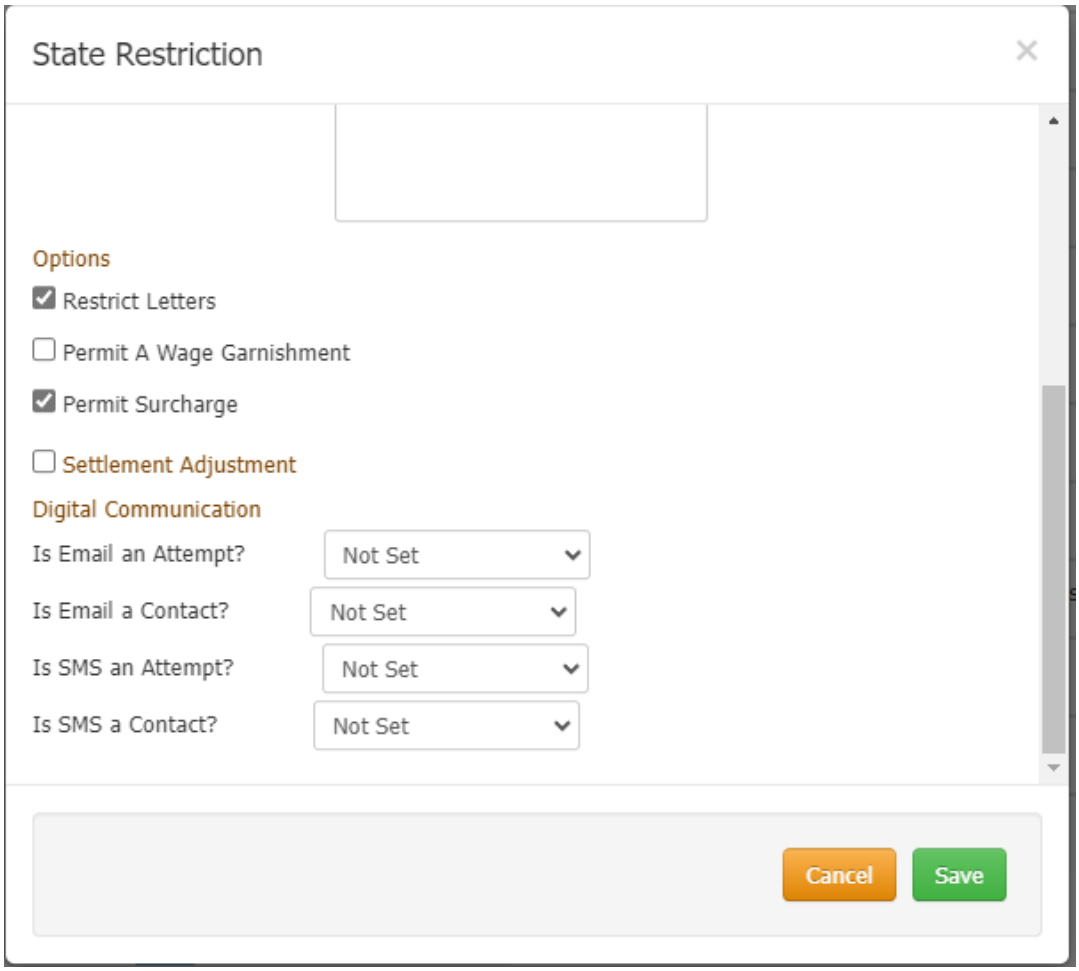
Permit Surcharge: If selected, the state allows collection of surcharges for customers residing in the state. If cleared, the surcharge option isn't available when creating payment arrangements.

Settlement Adjustment: If selected, settlement adjustment box appears to add the positive or negative values.(This value will affect the settlement amount in arrangement screen)

Digital Communication: These are options to sending an email/SMS as an attempt or a contact

- **Is Email an Attempt:** Not Set by default, If **Yes** selected sending an email as an attempt, Not considered If **No** selected.
- **Is Email a Contact:**Not Set by default, If **Yes** mselected sending an email as an attempt, Not considered If **No** elected.

- **Is SMS an Attempt:**Not Set by default, If **Yes** selected sending SMS as an attempt, Not considered If **No** selected.
- **Is SMS a Contact:**Not Set by default, If **Yes** selected sending SMS as attempt, Not considered If **No** selected.



3. Modify the information and then click **Save**.

Related Topics

Search for a Permission or System Code

Data Grids

State Restriction

Task Scheduler

Feedback

Create a Schedule

Use the **Schedule** tab to **Create Schedules** for the tasks and run the tasks at the defined schedules.

To add a Schedule:

1. In the **Navigation pane**, click **System Codes and Settings > General Settings > Task Schedular**

2. Create a **Schedule.**

General

- **Name:** User to set the name of the task.
- **Description:** User to add the description of the task.

Scheduled Time

- **Date:** Sets **'Date'** to run the Tasks.
- **Time:** Sets **'Time'** to run the tasks.
- **Never Between:** Selecting the check box, avoids the execution of tasks between specific times.
- **Occurs every:** choose from the drop-down, the intervals of task execution (15 mins, hourly. etc.)

Recurrence Pattern

- **Daily (Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday):** Enable s the task that occurs daily during the week.
- **Monthly:** Creates a schedule that recurs every month.

Schedules: List of all the Schedules shown in the Schedules Tab.

Enabled: Tick the option to enable the Schedule to run. When a schedule is disabled, all Tasks associated with it are also disabled. However, when a schedule is enabled, Tasks associated with it are not enabled. The user should manually review each task and enable it.

Delete: Removes the Schedule and any tasks associated with it.

Edit: Edits the specific schedule and all the Tasks' Next Run Time is updated per the schedule.

Feedback

Modify a Schedule

Use the **Edit** tab to modify **Schedules** for the tasks and run the tasks at the defined schedules.

General

- **Name:** User to set the name of the task.
- **Description:** User to add the description of the task.

Scheduled Time

- **Date:** Sets **'Date'** to run the Tasks.
- **Time:** Sets **'Time'** to run the tasks.
- **Never Between:** Selecting the check box, avoids the execution of tasks between specific times.
- **Occurs every:** choose from the drop-down, the intervals of task execution (15 mins, hourly. etc.)

Recurrence Pattern

- **Daily (Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday):** Enable s the task that occurs daily during the week.
- **Monthly:** Creates a schedule that recurs every month.

Feedback

Create a Task

Use the **Tasks tab**, to create a new task and modify existing tasks (from an existing pre-defined set of tasks, with the ability to override parameters).

- **Tasks:** Displays list of tasks once created.
- **Schedule:** The schedule per which this task is supposed to run.
- **Task Status:** Displays the status of each task.
- **Last Run Date Time:** Displays the **Date** and **Time** of the Task which was last executed.
- **Next Run Date Time:** Display the **Date** and **Time** of the task which is supposed to run next.
- **Email upon Run & Email Upon failed:** Email will be sent on success/failure to this mail ID. This expects the Email configuration to be provided in the TaskScheduler.exe.config.
- **Enabled:** This shows if the Task is currently enabled or disabled and also provides an option to toggle its Status.
- **Delete:** Removes the selected Tasks.

Feedback

Add A Task

Use **Create Tasks** to add new tasks in the Task Scheduler.

- **Name:** Can be used to provide a user-friendly name for a task (For ex. Custodian for US customer codes)
- **Description:** Displays the description of the Tasks.
- **Tasks:** Displays a pre-defined list of tasks listed below and what they do
- **Fetch Email:**- Fetches inbound emails.
- **Clean Expired Wallet Items:** Removes wallet items that are associated with expired tokens
- **Custodian:** End-of-day processes that can now be configured to be run at different times for different customer codes.
- **Send Email:** Sends scheduled outbound emails.

- **Send SMS:** Sends scheduled outbound SMS.
- **Schedules:** Display the list of schedules available.
- **Email Upon Error:** The email id to be added for the error message.

Feedback

Modify A Task

Use **Edit Tasks** to modify existing tasks in the Task Scheduler.

Name: Displays Name of Tasks

Description: Displays the description of the Tasks.

Tasks: Displays a pre-defined list of tasks

Schedules: Display the list of schedules.

Parameters: Displays a list of pre-defined parameters based on the selected task.

Email Upon Error: The email id to be added for the error message.

Email Upon Success: The email id to be added for the success message.

Feedback

Customizing Custodian Task

Custodian task has extensive configuration ability using which users can configure what all procedures need to be executed and what should their parameters be. It also has a provision to add a custom stored procedure to be executed along with the in-built procedures. Customers can also now limit the Custodian to execute the in-built and custom procedures to be executed only for a selected list of Customer codes. If left blank, it assumes that the procedures should be executed for all customer codes. Customers can also customize the time out period as well.

Add Procedure: Add the procedure name and any parameters that are required for it.

Localization

Localization

Use Localization to specify permission and policies which modifies the date format, phone number format using the country code.

Related Topics

Account_Data

Currency_Symbol_Format_Settings

User_Interface

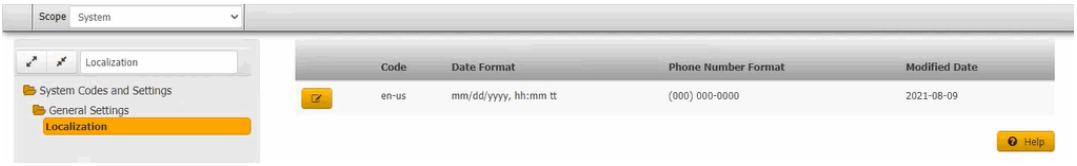
Language_Pack_Selection_for_UI

Modify Localization

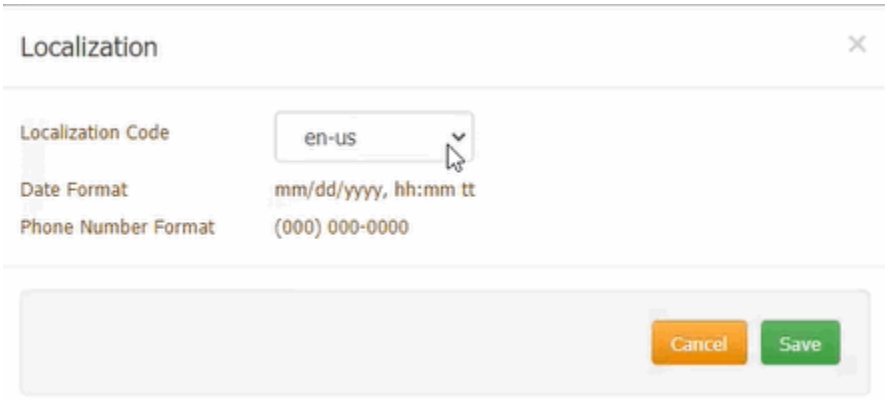
Use the **Localization** dialog box to modify a date format and phone number format using country code.

To modify localization

1. In the **Navigation** pane, click **System Codes and Settings** > **General Settings** > **Localization**.



2. Click the Edit icon. The **Localization** dialog box appears.



Localization Code: Country codes can be selected. Default is set to **en-us** code. For example, "en-us" indicates an English-speaking country, and the country is the United States of America. Latitude uses this information for things such as determining which Date and Phone Number format to use.

Date Format: Displays the Date and time Format according to the Localization code selected

Phone Number Format: Displays the Phone Number Format according to the Localization code selected

3. Modify the information and then click **Save**.

Related Topics

Search for a Permission or System Code

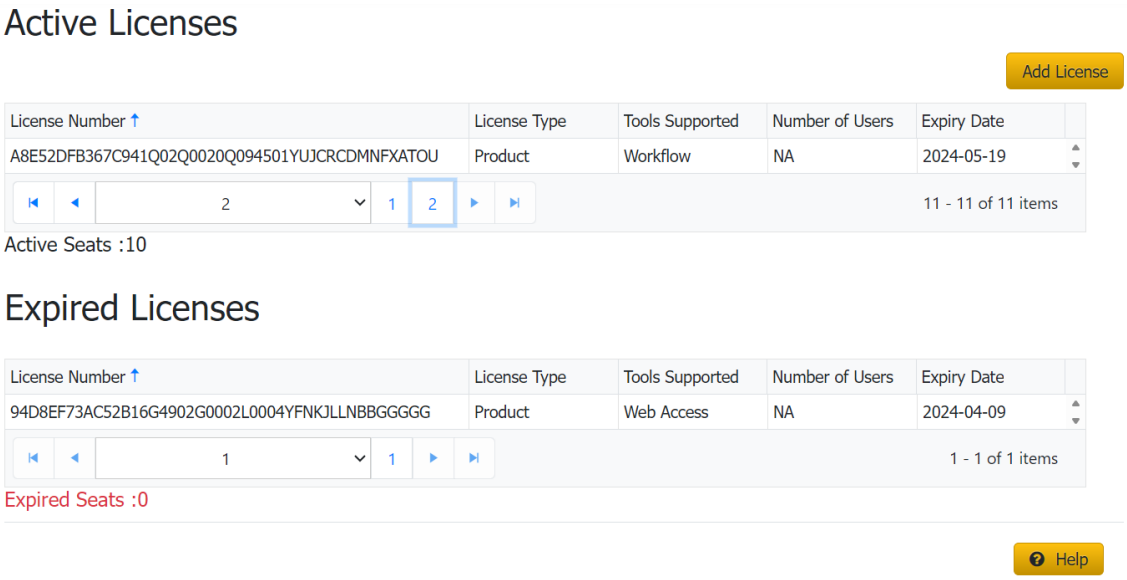
Data Grids

Holidays

License Management

License Management

Use **License Management**, to add new licenses and to view this information in a readable format that shows the tool/suite, number of users, creation date, and expiry date. It shows detailed information for Active and Expired Licenses.



License Number: It is a unique number.

License Type: It specifies the type of License customer purchased.

1. Seat License: It allows the number of concurrent users that are allowed to use the Latitude Products.

2. p roduct License: It allows access to specific products purchased by the user.

Tools supported: It Identifies the product for which this License is applicable.

Each of these tools necessitates a product license for access

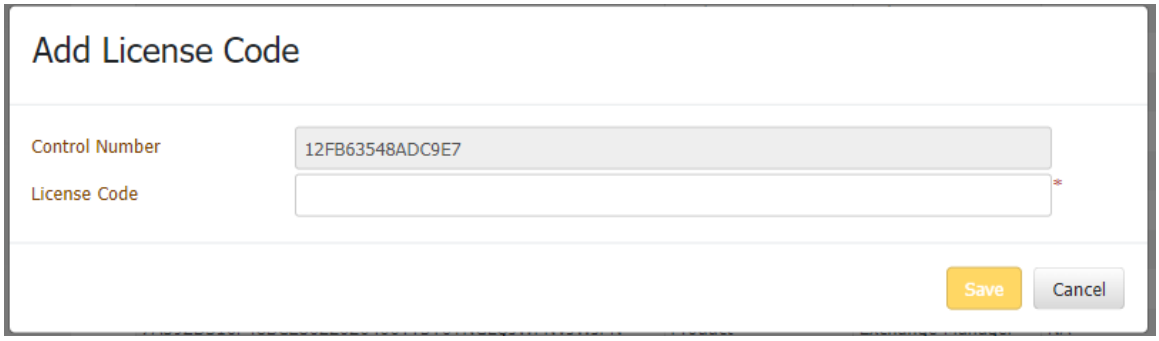
- Agency Interface Manager
- AIM Receiver
- Dialer Config
- Dialer Update Service
- Exchange Manager
- Fusion
- List Builder
- Portfolio Manager
- Job Manager
- Workflow
- Web Access

Number of Users: It gives information on the number of users of a specific license (only seat and above. Product license will always have zero number of users)

Expiry Date: It gives information on each product till which license is valid.

Add license

It uses to add new Licenses.



Control Number: It is a unique number automatically generated .

License code: The control number needs to be passed on to the care team to generate the license code.

Language

Feedback

Language

This will allow the users to select the language from the available list of languages and add them in the supported languages list.

Feedback

Supported Languages

Uses to view/add list of supported languages.

NOTE: When you add a new language, copy the new language file to the asset/i18in the folder on the server.

Organization Groups

Feedback

Organization Groups

You can set up and configure various groups in Latitude. These groups allow you to streamline the process of granting permissions and assigning accounts. You can grant permissions to:

- An individual user.
- A role that you assigned to one or more users.
- A branch in your organization that you assigned to one or more users.
- A desk that you assigned to a user.
- A department in your organization.
- A team in your organization.

Related Topics

Branches

Departments

Roles

Teams

Users

System Codes and Settings

Branches

Branches

You can search for, add, modify, and delete branches. If you have more than one office (or branch), you can set up a branch and assign it to accounts to provide inventory separation by location.

Related Topics

Add a Branch

Modify a Branch

Delete a Branch

Search for a Permission or System Code

Data Grids

Departments

Add a Branch

Use the **Branch** dialog box to add a branch.

To add a branch

1. In the **Navigation** pane, click **System Codes and Settings** > **Organization Groups** > **Branches**.

2. Click the plus sign (+). The **Branch** dialog box appears.

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

Related Topics
Search for a Permission or System Code

Data Grids

Branches

Modify a Branch

Use the **Branch** dialog box to modify a branch.

To modify a branch

1. In the **Navigation** pane, click **System Codes and Settings** > **Organization Groups** > **Branches**.

2. Click the Edit icon. The **Branch** dialog box appears.

3. Modify the information and then click **Save**.

Related Topics
Search for a Permission or System Code

Data Grids

Branches

Delete a Branch

Use the **Branches** panel to delete a branch that your organization didn't assign to another entity, such as a user, department, or account.

To delete a branch

1. In the **Navigation** pane, click **System Codes and Settings** > **Organization Groups** > **Branches**.

2. Click the Delete icon and then click **Yes**.

Related Topics
Search for a Permission or System Code

Data Grids

Branches

Departments

Feedback

Departments
You can search for, add, modify, and delete departments. You assign departments to a specific branch.

Related Topics
Search for a Department

Add a Department

Modify a Department

Delete a Department

Search for a Permission or System Code

Data Grids

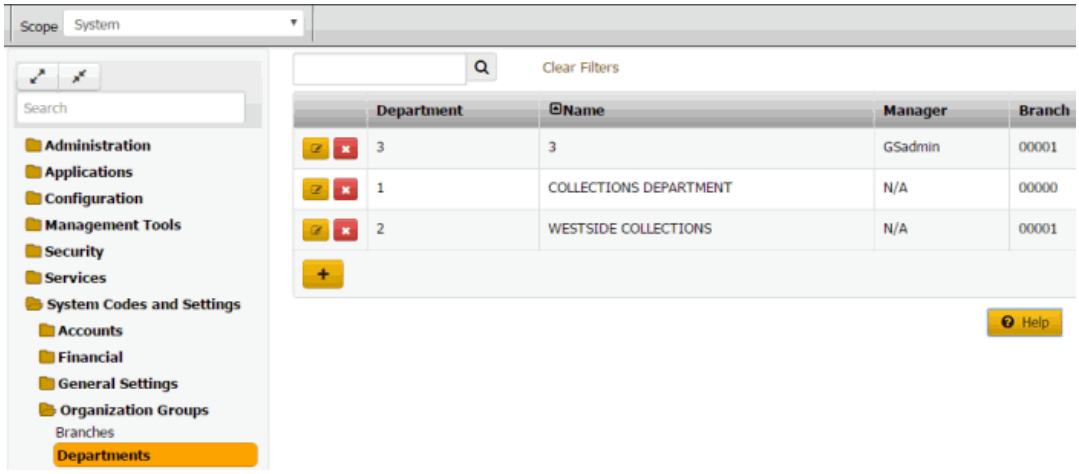
Branches

Feedback

Search for a Department
Use the **Departments** panel to search for a department.

To search for a department

1. In the **Navigation** pane, click **System Codes and Settings** > **Organizational Groups** > **Departments**.



2. In the **Search** box in the **Departments** panel, type one or more characters to search and then press **Enter** or click the Search icon. The system searches the department code, name, manager, and branch for a match. It displays only the departments that match your search criteria.

3. To clear the search criteria, click **Clear Filters**. The system displays all departments.

Related Topics

Search for a Permission or System Code

Data Grids

Departments

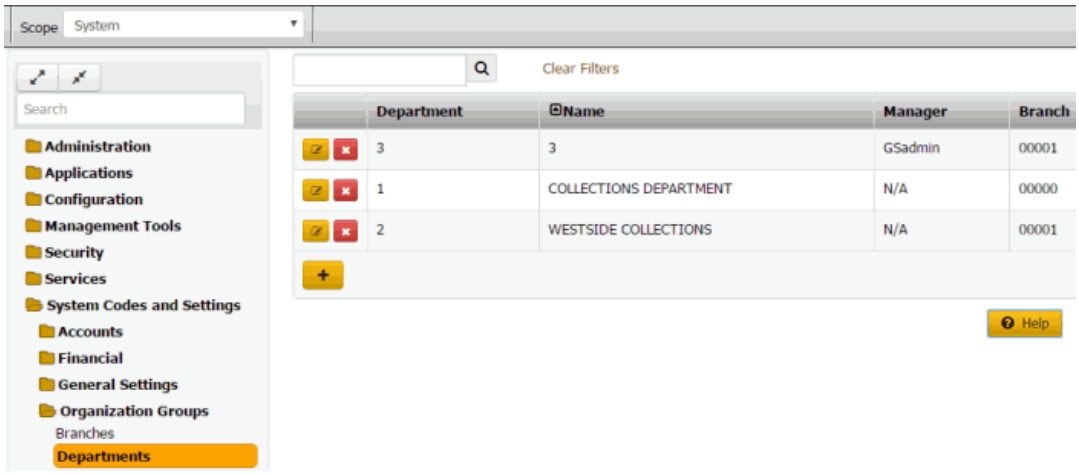
Feedback

Add a Department

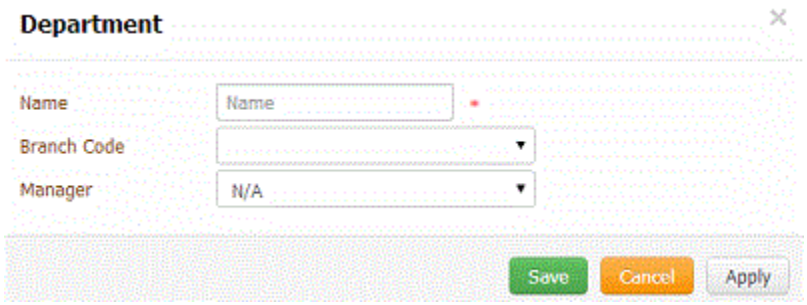
Use the **Department** dialog box to add a department.

To add a department

1. In the **Navigation** pane, click **System Codes and Settings** > **Organization Groups** > **Departments**.



2. Click the plus sign (+). The **Department** dialog box appears.



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

Related Topics

Search for a Permission or System Code

Data Grids

Departments

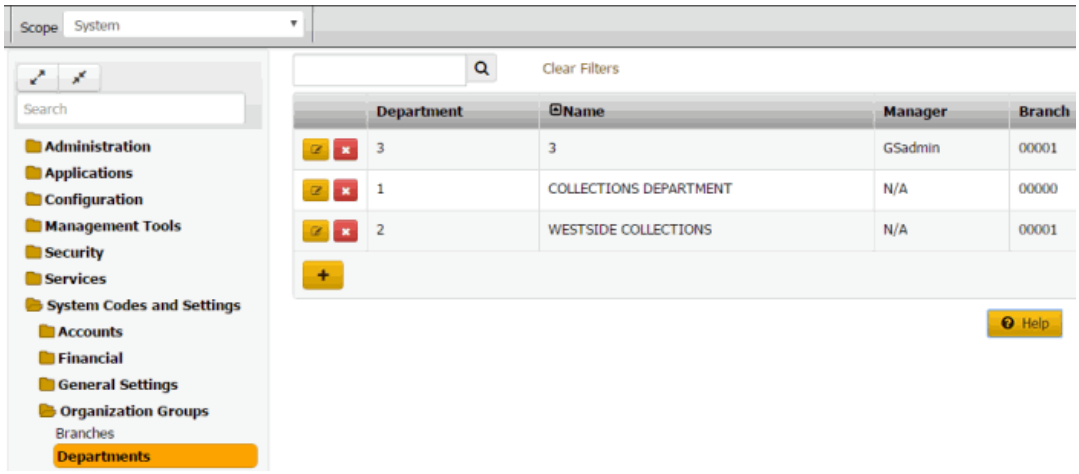
Feedback

Modify a Department

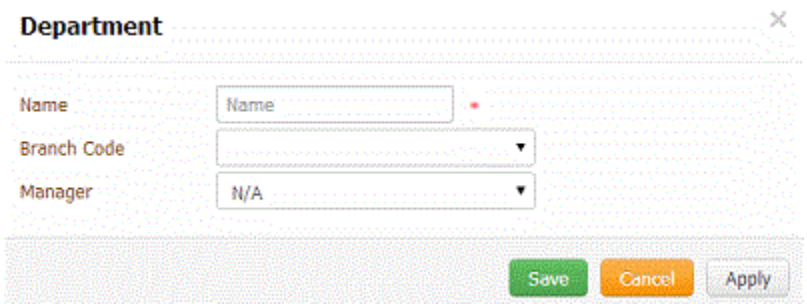
Use the **Department** dialog box to modify a department.

To modify a department

1. In the **Navigation** pane, click **System Codes and Settings** > **Organization Groups** > **Departments**.



2. Click the Edit icon. The **Department** dialog box appears.



3. Modify the information and then click **Save**.

Related Topics

Search for a Permission or System Code

Data Grids

Departments

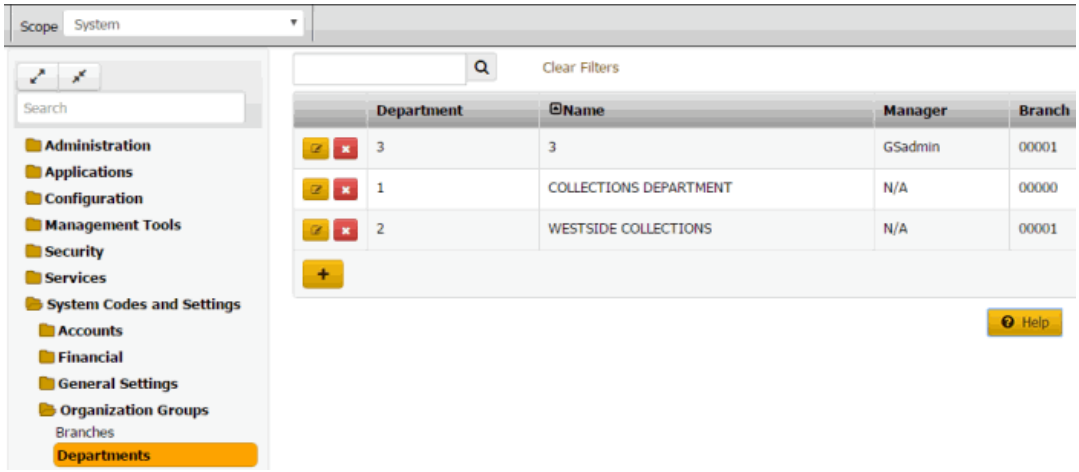
Feedback

Delete a Department

Use the **Departments** panel to delete a department.

To delete a department

1. In the **Navigation** pane, click **System Codes and Settings** > **Organization Groups** > **Departments**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Search for a Permission or System Code

Data Grids

Departments

Roles

Feedback

Roles

You can search for, add, modify, copy, and delete roles. Roles facilitate granting multiple permissions to multiple users who require the same permissions. For more information about permissions and policies for roles, see Permissions and Policies.

Related Topics

Add a Role

Modify a Role

Search for a Permission or System Code

Permissions and Policies

Data Grids

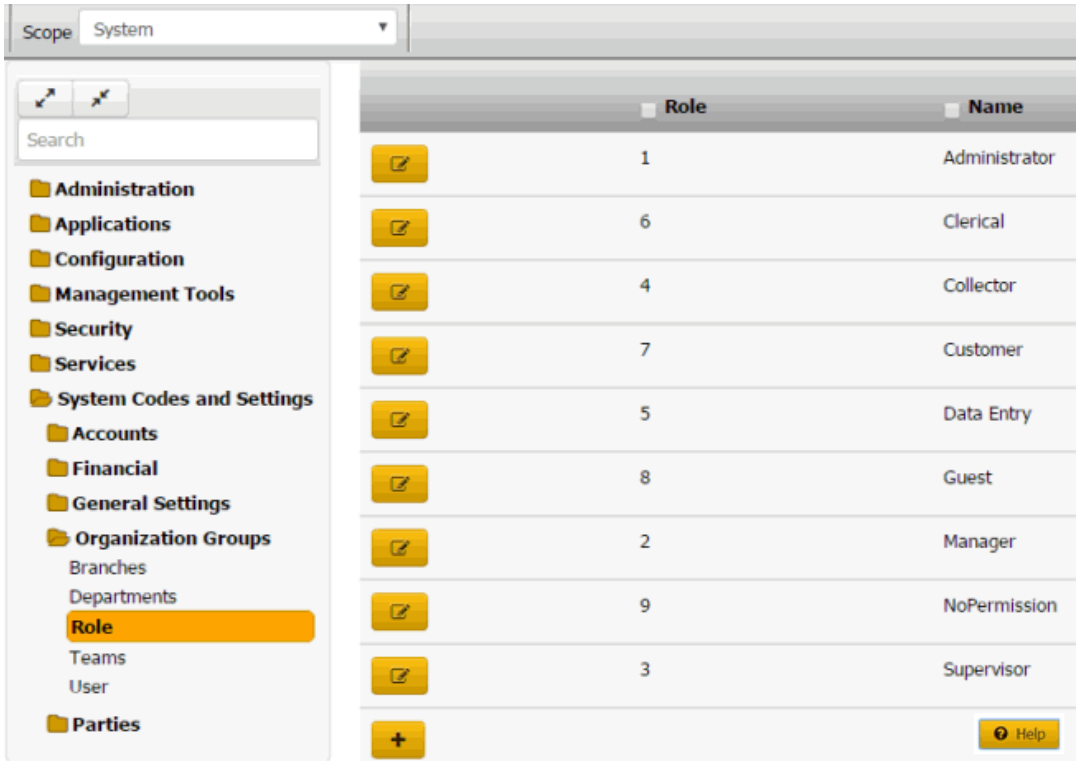
Feedback

Add a Role

Use the **Role** dialog box to add a role. After adding a role, assign permissions to the role and assign the role to one or more users.

To add a role

1. In the **Navigation** pane, click **System Codes and Settings** > **Organization Groups** > **Role**.



2. Click the plus sign (+). The **Role** dialog box appears.

3. In the **Name** box, type the name of the new role and then click **Save**.

Related Topics

Search for a Permission or System Code

Data Grids

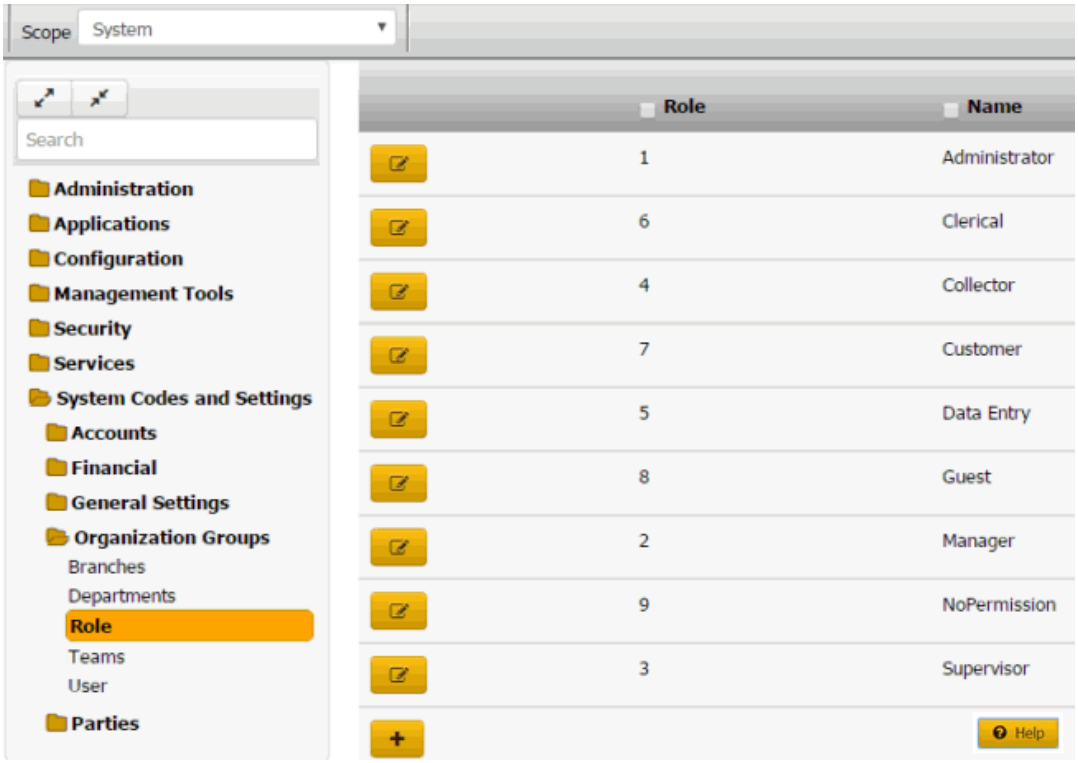
Roles

Modify a Role

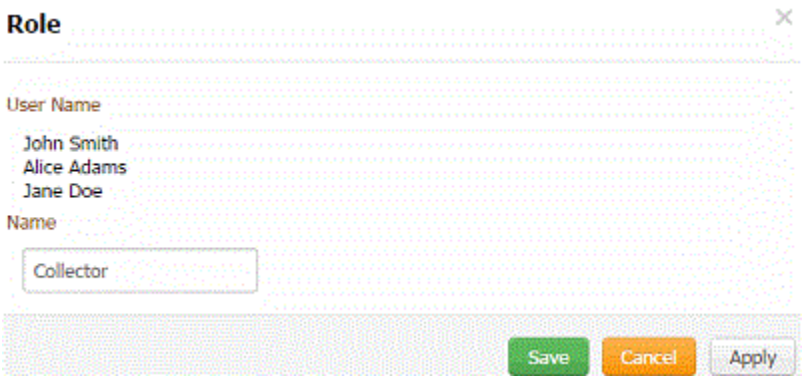
Use the **Role** dialog box to modify the name of a role or view the users assigned to a role.

To modify a role

1. In the **Navigation** pane, click **System Codes and Settings** > **Organization Groups** > **Role**.



2. Click the Edit icon. The **Role** dialog box appears.



User Name: Users assigned to the role.

3. In the **Name** box, modify the name of the role and then click **Save**.

Related Topics

Search for a Permission or System Code

Data Grids

Roles

Teams

Feedback

Teams

You can search for, add, modify, and delete teams. You assign teams to a specific department.

Related Topics

Search for a Team

Add a Team

Modify a Team

Delete a Team

Search for a Permission or System Code

Data Grids

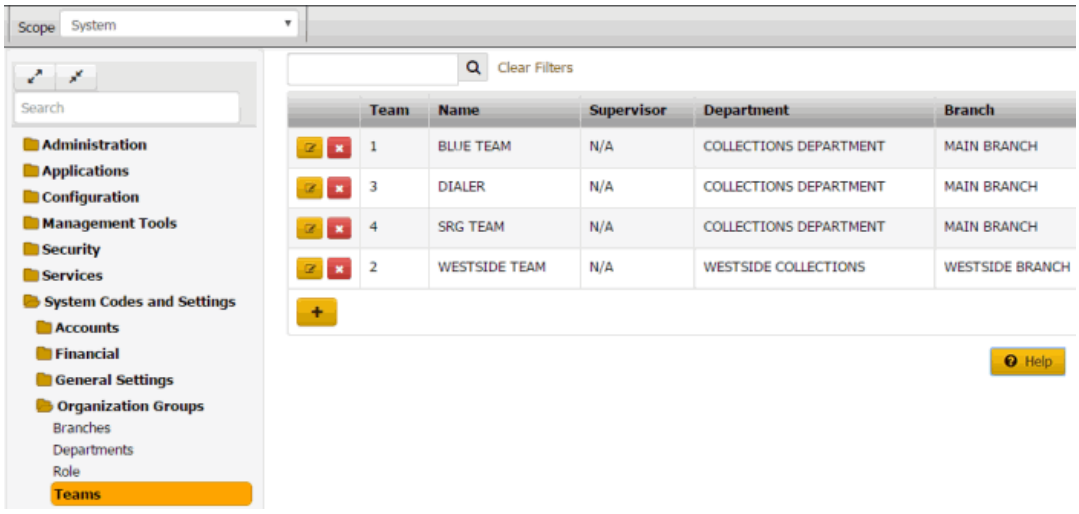
Feedback

Search for a Team

Use the **Teams** panel to search for a team.

To search for a team

1. In the **Navigation** pane, click **System Codes and Settings** > **Organizational Groups** > **Teams**.



2. In the **Search** box in the **Teams** panel, type one or more characters to search and then press **Enter** or click the Search icon. The system searches the team code, name, supervisor, department, and branch for a match. It displays only the teams that match your search criteria.

3. To clear the search criteria, click **Clear Filters**. The system displays all teams.

Related Topics

Search for a Permission or System Code

Data Grids

Teams

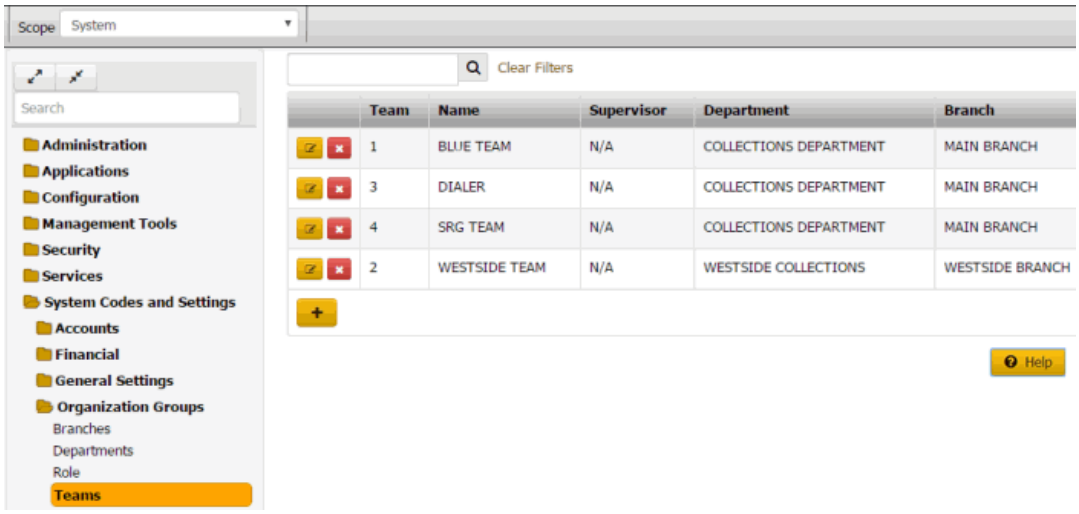
Feedback

Add a Team

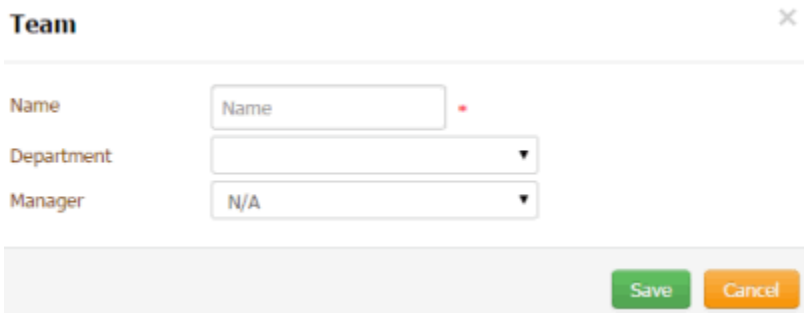
Use the **Team** dialog box to add a team code.

To add a team code

1. In the **Navigation** pane, click **System Codes and Settings** > **Organization Groups** > **Teams**.



2. Click the plus sign (+). The **Team** dialog box appears.



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

Related Topics

Search for a Permission or System Code

Data Grids

Teams

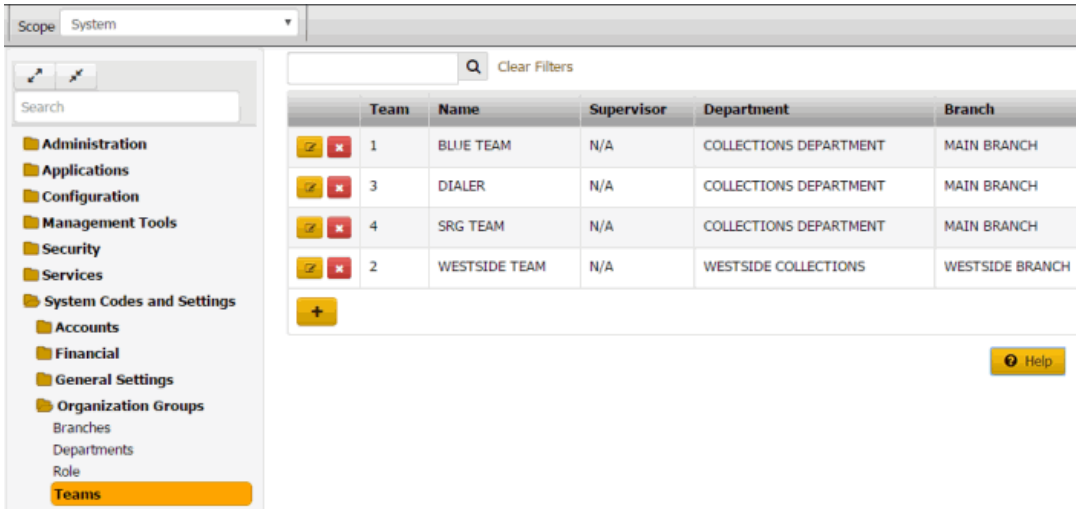
Feedback

Modify a Team

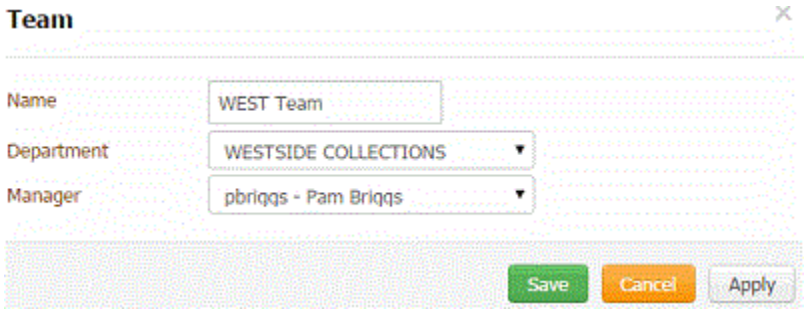
Use the **Team** dialog box to modify a team code.

To modify a team code

1. In the **Navigation** pane, click **System Codes and Settings** > **Organization Groups** > **Teams**.



2. Click the Edit icon. The **Team** dialog box appears.



3. Modify the information and then click **Save**.

Related Topics

Search for a Permission or System Code

Data Grids

Teams

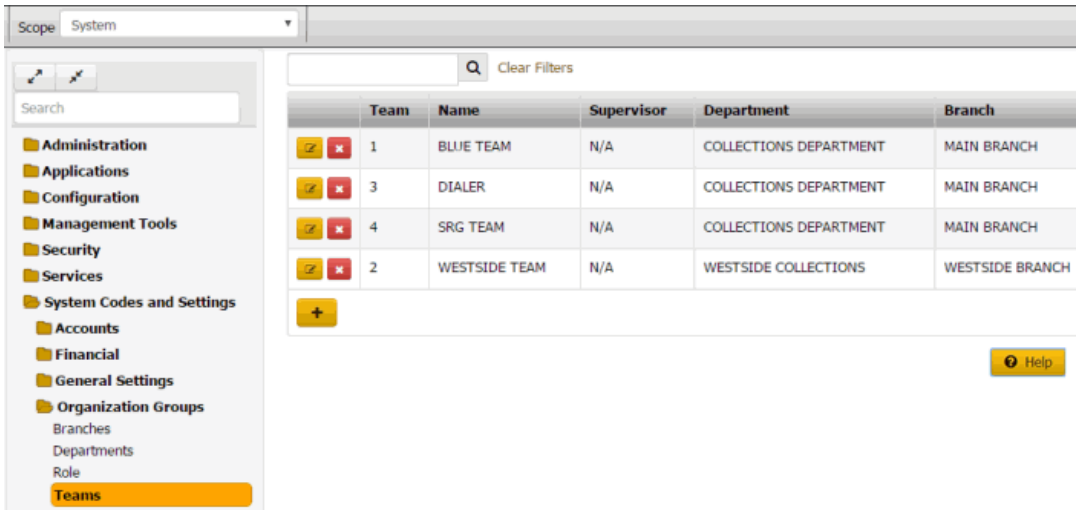
Feedback

Delete a Team

Use the **Teams** panel to delete a team code.

To delete a team code

1. In the **Navigation** pane, click **System Codes and Settings** > **Organization Groups** > **Teams**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Search for a Permission or System Code

Data Grids

Teams

Users

Users

You can search for, add, and modify users; and activate or deactivate user accounts. However, you cannot delete user accounts.

You can modify permissions and policies for a user after assigning the user to a role. If you change the permission or policy for a role, the change affects the users assigned to that role, unless you set the permission or policy at the user level. For more information about permissions and policies for users, see Permissions and Policies.

Related Topics

Add a User

Modify a User

Activate or Deactivate a User Account

Search for a Permission or System Code

Permissions and Policies

Data Grids

Add a User

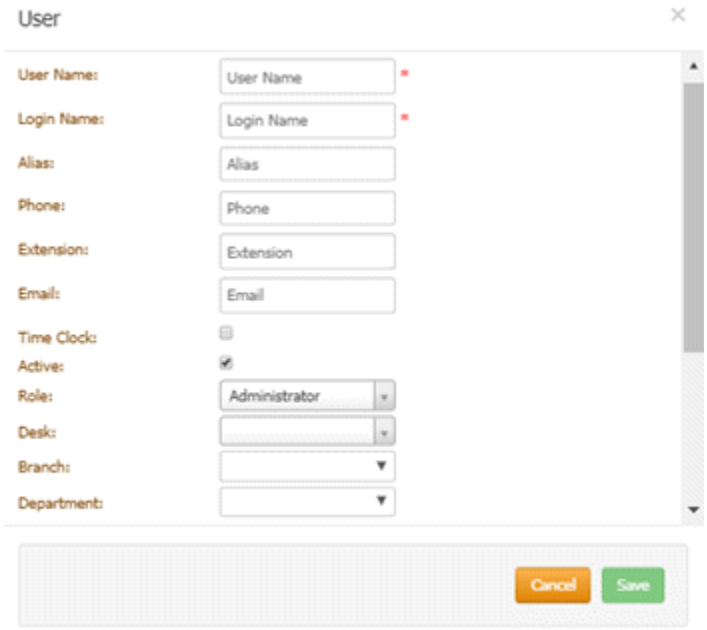
Use the **User** dialog box to add a user. You cannot set a user's password through the add feature. To set the user's password, add the user and then use the edit feature.

To add a user

1. In the **Navigation** pane, click **System Codes and Settings** > **Organization Groups** > **User**.

Tip: To display active users only in the data grid, click **Only show active users**.

2. Click the plus sign (+). The **User** dialog box appears.



User Name: User's first and last name.

Login Name: User's logon name.

Alias: User's alias name such as a shortened version of the first name or a nickname.

Phone: User's telephone number

Extension: User's telephone extension number.

Email: User's email address (for example, jdoe@mycompany.com).

Time Clock: If selected, the system includes the user's logon and logoff times on the User Logon report.

Active: If selected, the user can log on to the system. If cleared, the user cannot log on to the system.

Role: User's role.

Desk: User's desk.

Branch: User's branch.

Department: User's department.

Dialer Login Credentials: Latitude uses these credentials to log on the user to a dialer automatically.

User Name: User's dialer logon name for a PureConnect or Genesys Cloud integration.

Password: User's dialer password for a PureConnect integration. Leave this box blank for a Genesys Cloud integration.

Third Party Credentials: Latitude uses these credentials to log on the user to a third-party system automatically.

User Name: User's logon name for the third-party system.

Password: User's password for the third-party system.

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

Related Topics

Search for a Permission or System Code

Data Grids

Users

Modify a User

Use the **User** dialog box to modify a user.

To modify a user

1. In the **Navigation** pane, click **System Codes and Settings** > **Organization Groups** > **User**.

Tip: To display active users only in the data grid, click **Only show active users**.

2. Click the Edit icon for the user account to modify. The **User** dialog box appears.

User Name: User's first and last name.

Login Name: User's logon name.

Reset Password: If selected, displays the **Password** box to allow you to change it.

Password: User's password. Periods display instead of the typed characters.

Note: Latitude uses the 512-bit Secure Hash Algorithm (SHA-512) with a randomly generated 512-bit salt that is unique per-user, per-password. Latitude stores the combined hash and salt in the user's account as a 128-character hexadecimal string.

Alias: User's alias name such as a shortened version of the first name or a nickname.

Phone: User's telephone number

Extension: User's telephone extension number.

Email: User's email address (for example, jdoe@mycompany.com).

Time Clock: If selected, the system includes the user's logon and logoff times on the User Logon report.

Active: If selected, the user can log on to the system. If cleared, the user cannot log on to the system.

Role: User's role.

Desk: User's desk.

Branch: User's branch.

Department: User's department.

Dialer Login Credentials: Latitude uses these credentials to log on the user to a dialer automatically.

User Name: User's dialer logon name for a PureConnect or Genesys Cloud integration.

Password: User's dialer password for a PureConnect integration. Leave this box blank for a Genesys Cloud integration.

Third Party Credentials: Latitude uses these credentials to log on the user to a third-party system automatically.

User Name: User's logon name for the third-party system.

Password: User's password for the third-party system.

3. Modify the information and then click **Save**.

Related Topics

Search for a Permission or System Code

Data Grids

Users

Activate or Deactivate a User Account

Use the **User** dialog box to activate or deactivate a user account, which determines whether a user can log on to Latitude.

To activate or deactivate a user account

1. In the **Navigation** pane, click **System Codes and Settings** > **Organization Groups** > **User**.

Note: To display active users only in the data grid, click **Only show active users**.

2. Click the Edit icon. The **User** dialog box appears.

3. Do one of the following:

   - To activate the user account, select the **Active** check box.

- To deactivate the user account, clear the **Active** check box.

Related Topics

Search for a Permission or System Code

Data Grids

Users

Party Codes

Party Codes

You can set up and configure system codes that users can assign to parties associated to an account.

Related Topics

Asset Types

Language Codes

System Codes and Settings

Asset Types

Asset Types

You can search for, add, modify, and delete asset types. Users specify an asset type when maintaining assets for a party on an account. For more information, see Maintain Assets.

Related Topics

Add an Asset Type

Modify an Asset Type

Delete an Asset Type

Search for a Permission or System Code

Data Grids

Party Codes

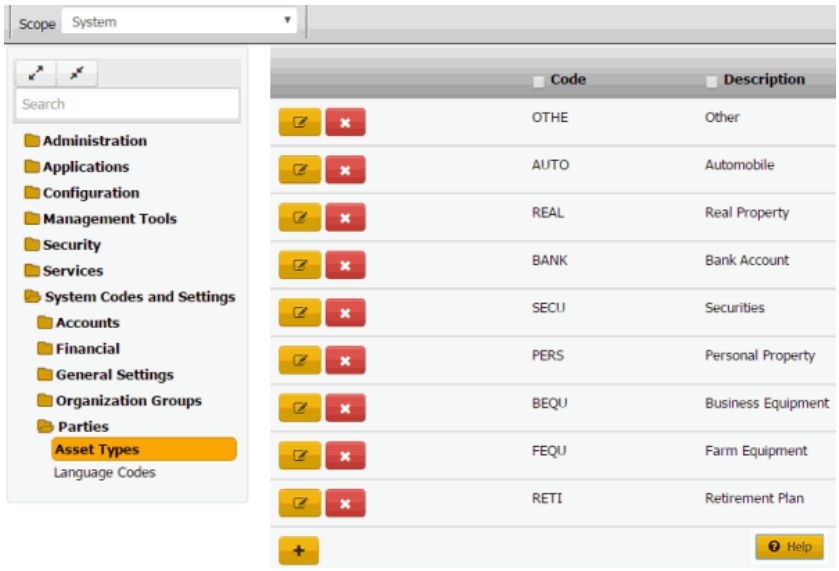
Maintain Assets

Add an Asset Type

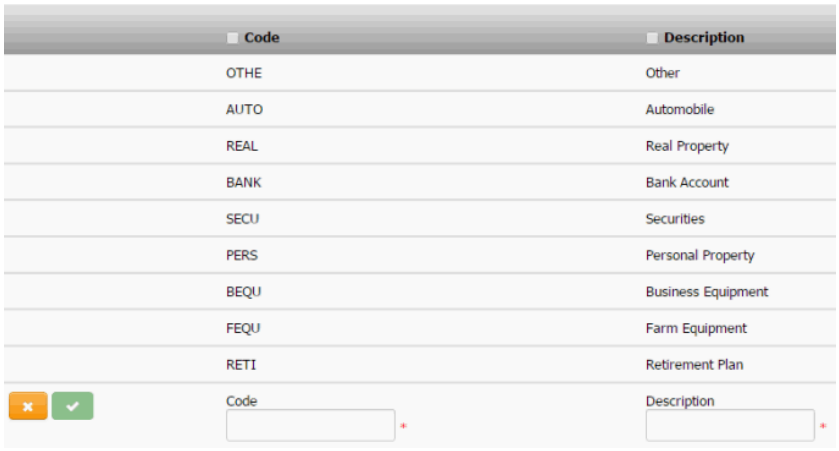
Use the **Asset Types** panel to add an asset type.

To add an asset type

1. In the **Navigation** pane, click **System Codes and Settings** > **Parties** > **Asset Types**.



2. Click the plus sign (+). A blank row appears in the data grid.



Code: Unique code that identifies the asset type.

Description: Description of the asset type.

3. Complete the information and then click the check mark.

Related Topics

Search for a Permission or System Code

Data Grids

Asset Types

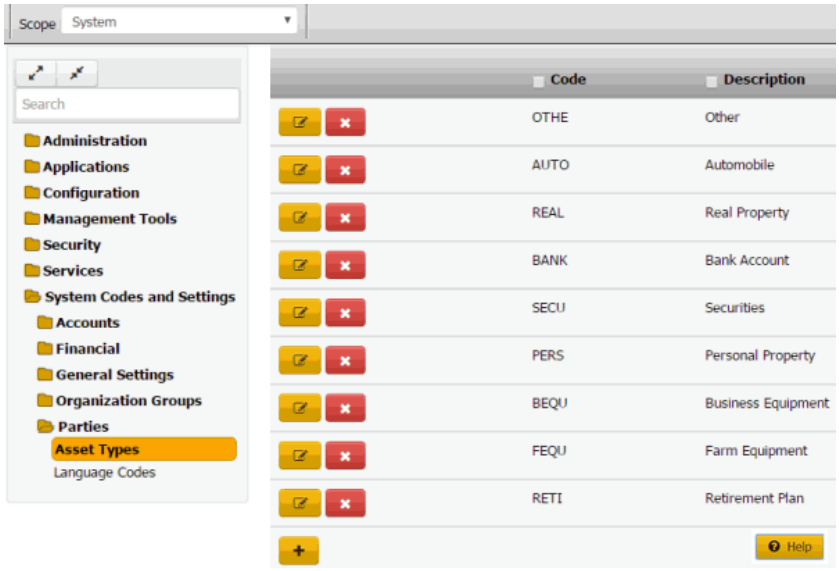
Feedback

Modify an Asset Type

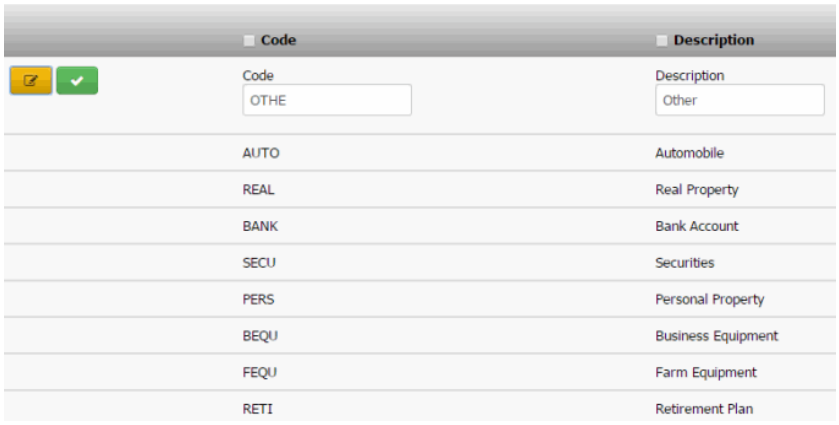
Use the **Asset Types** panel to modify an asset type.

To modify an asset type

1. In the **Navigation** pane, click **System Codes and Settings** > **Parties** > **Asset Types**.



2. Click the Edit icon. The asset type appears in edit mode.



Code: Unique code that identifies the asset type.

Description: Description of the asset type.

3. Modify the information and then click the check mark.

Related Topics

Search for a Permission or System Code

Data Grids

Asset Types

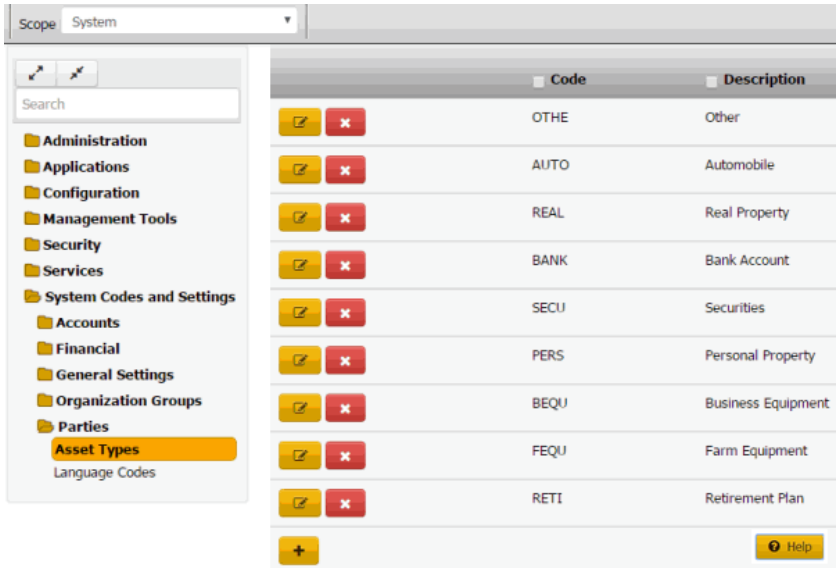
Feedback

Delete an Asset Type

Use the **Asset Types** panel to delete an asset type.

To delete an asset type

1. In the **Navigation** pane, click **System Codes and Settings** > **Parties** > **Asset Types**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Search for a Permission or System Code

Data Grids

Asset Types

Language Codes

Feedback

Language Codes

You can search for, add, modify, and delete language codes. Users can assign language codes when maintaining a party on an account. For more information, see Maintain Contact Information.

Related Topics

Add a Language Code

Modify a Language Code

Delete a Language Code

Search for a Permission or System Code

Data Grids

Party Codes

Maintain Contact Information

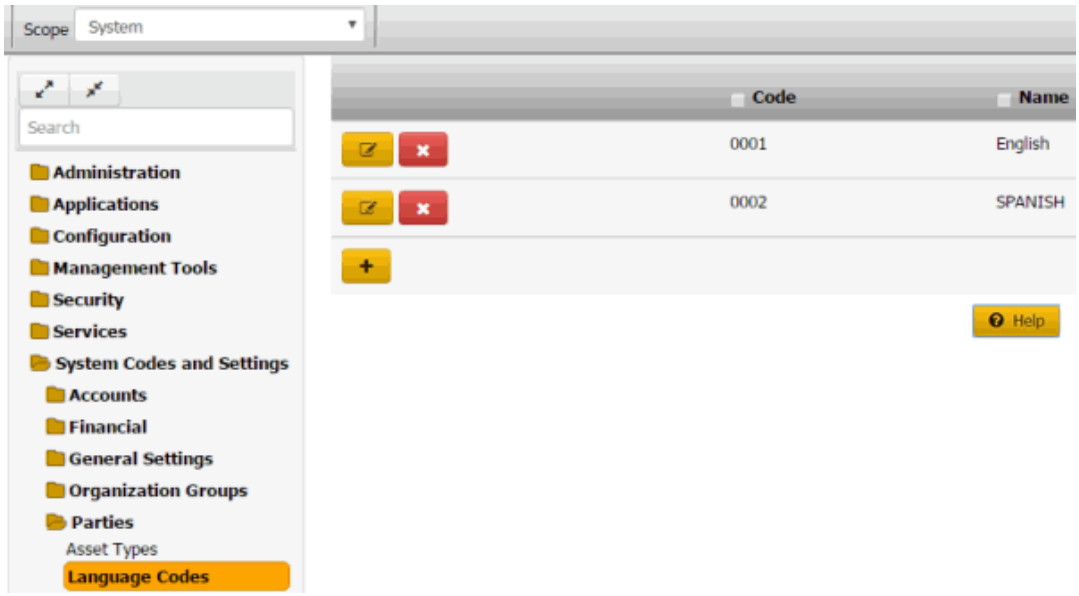
Feedback

Add a Language Code

Use the **Language Codes** panel to add a language code.

To add a language code

1. In the **Navigation** pane, click **System Codes and Settings** > **Parties** > **Language Codes**.



2. Click the plus sign (+). A blank row appears in the data grid.

Code: Unique code that identifies the language type.

Name: Name of the language.

3. Complete the information and then click the check mark.

Related Topics

Search for a Permission or System Code

Data Grids

Language Codes

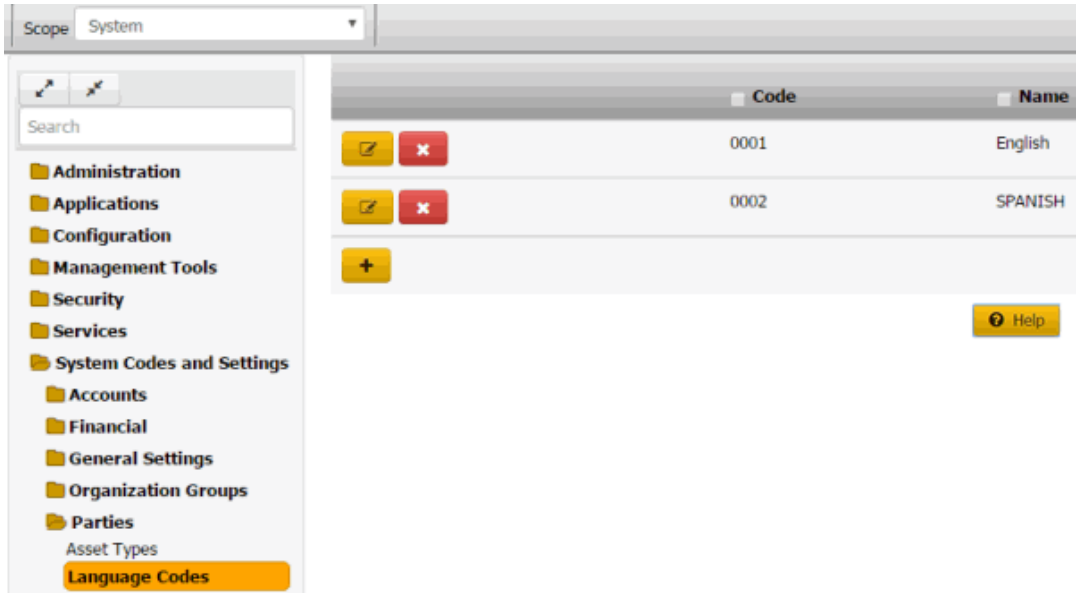
Feedback

Modify a Language Code

Use the **Language Codes** panel to modify a language code.

To modify a language code

1. In the **Navigation** pane, click **System Codes and Settings** > **Parties** > **Language Codes**.



2. Click the Edit icon. The language code appears in edit mode.

Code: Unique code that identifies the language type.

Name: Name of the language.

3. Modify the information and then click the check mark.

Related Topics

Search for a Permission or System Code

Data Grids

Language Codes

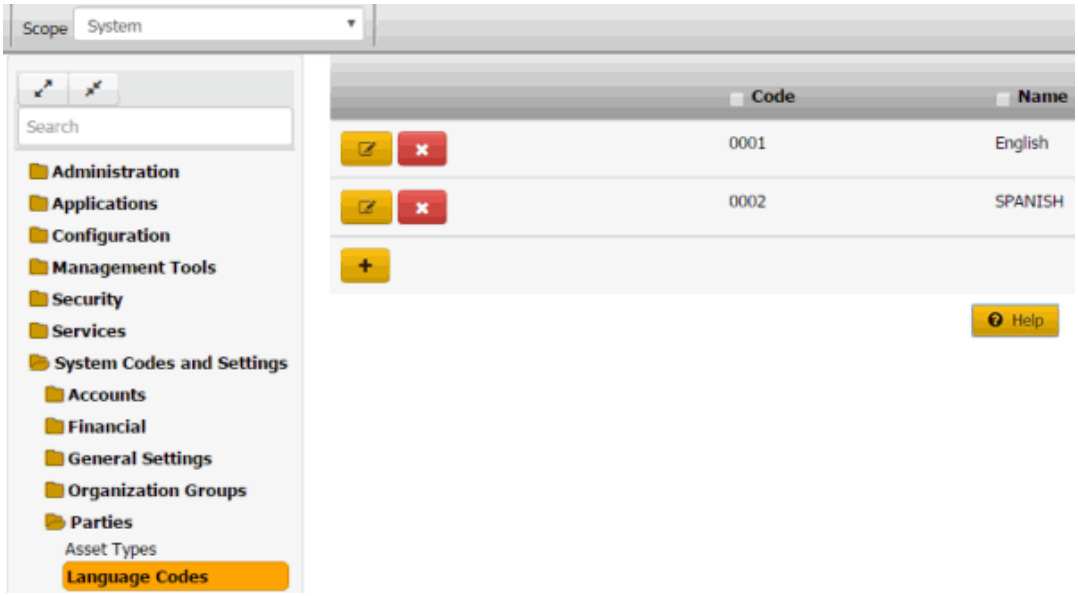
Feedback

Delete a Language Code

Use the **Language Codes** panel to delete a language code.

To delete a language code

1. In the **Navigation** pane, click **System Codes and Settings** > **Parties** > **Language Codes**.



2. Click the Delete icon and then click **Yes**.

Related Topics

Search for a Permission or System Code

Data Grids

Language Codes

Script Builder

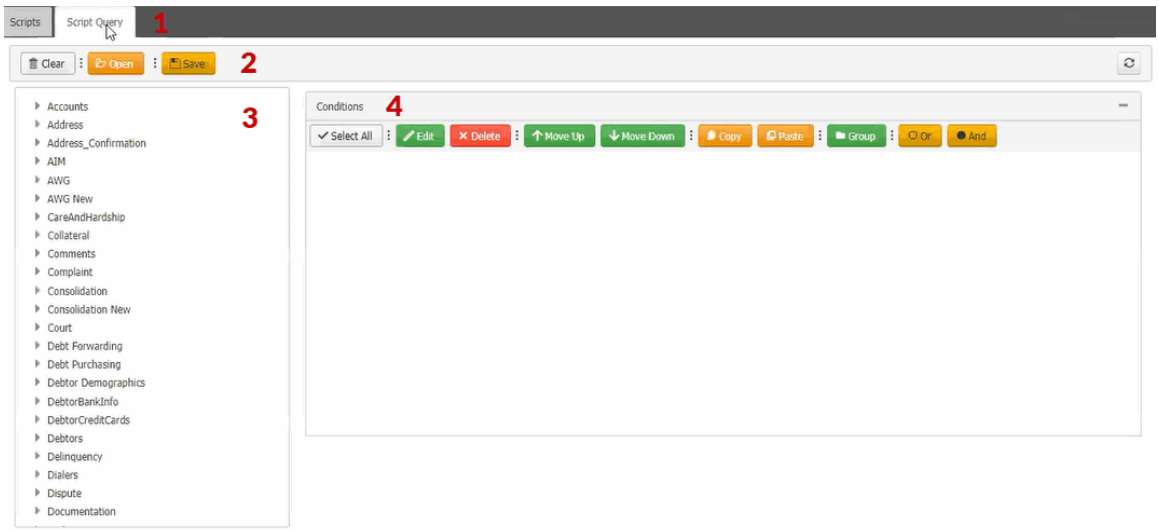
Script Builder

You can use the **Script Builder** tool to create scripts queries and scripts. You must have Access Script Builder Permission enabled to access **Script Builder** tab. **Script Builder** is used to configure verbiage that can be displayed when a panel is opened or the account is popped. You can have a base script and also conditional scripts

For more information about script, see the Scripts.

To open the Script Query page

On the **Welcome** page, click **Script builder**. The **Script Query** page appears.



1. **Tabs:** Displays the tabs for designing, viewing, and modifying the query.
2. **Toolbar:** Provides options for clearing, opening, and saving the query results.

Option	Description
Clear	Clears all query settings currently displayed in the window.
Open	Clears the query settings currently displayed in the window and opens a saved query.
Save	Saves the query settings currently displayed in the window.

3. **Data Selection tree:** Provides a list of data you can select to create a query.
4. **Conditions pane:** Allows you to set the conditions for retrieving data.

Related Topics

Create a Script Query

Modify a Script Query

Script Query Conditions

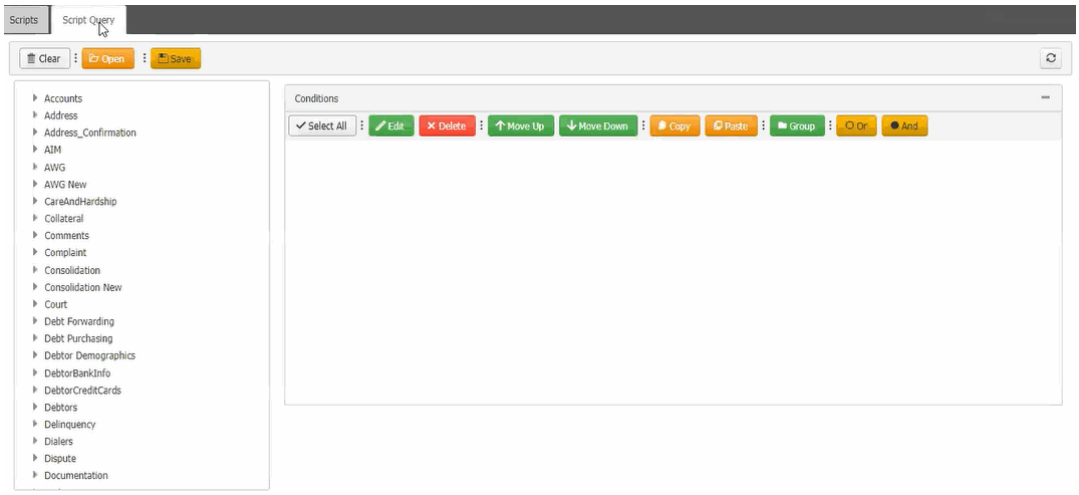
Scripts

Create a Script Query

Use the **Script Query** page to query accounts based on specific criteria and analyze the results.

To create a script query

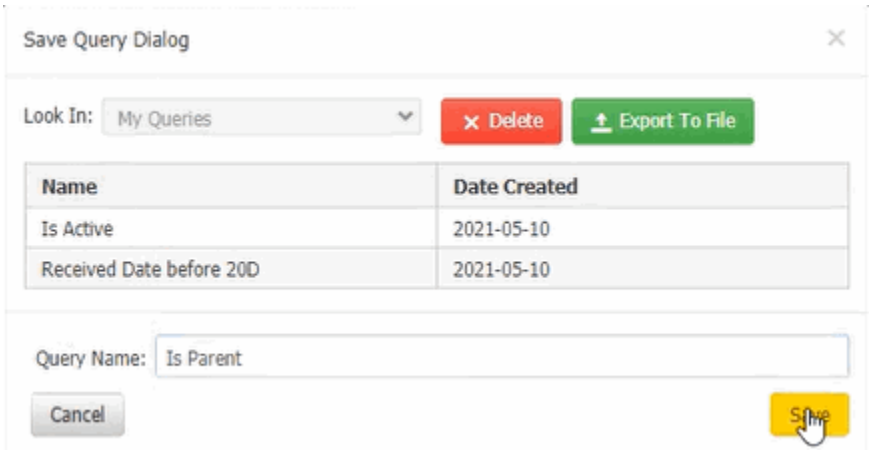
1. On the **Welcome** page, click **Script Builder**. The **Script Query** page appears.



2. In the **Conditions** pane, specify one or more conditions. For more information about working with conditions, see Script Query Conditions.

3. To save the script query, do the following:

a. In the toolbar, click **Save**. The **Save Query Dialog** box appears.



b. In the **Query Name** box, type a name for the query and then click **Save**.

9. To export the query, in the **Save Query Dialog** box, click **Export To File**. Script Query file is downloaded.

10. To delete a saved query, in the **Save Query Dialog** box, click **Delete** to delete a saved Script query.

Related Topics
Script Builder

Script Query Conditions

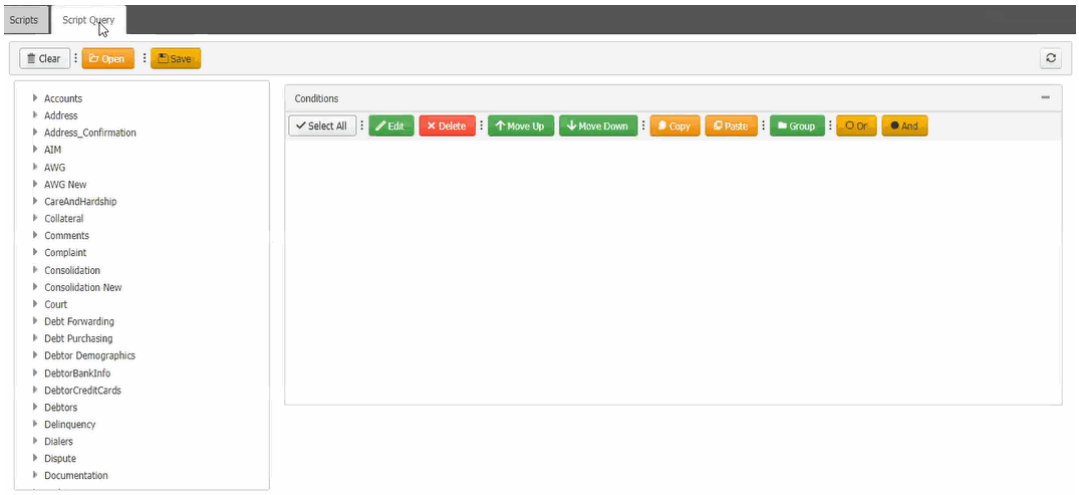
Scripts

Modify a Script Query

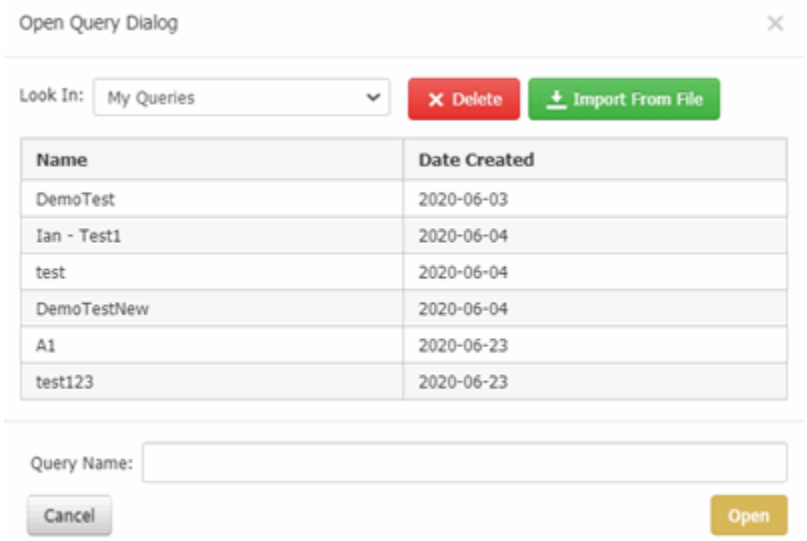
Use the **Script Query** page to modify a script query.

To create a script query

1. On the **Welcome** page, click **Script Query**. The **Script Query** page appears.

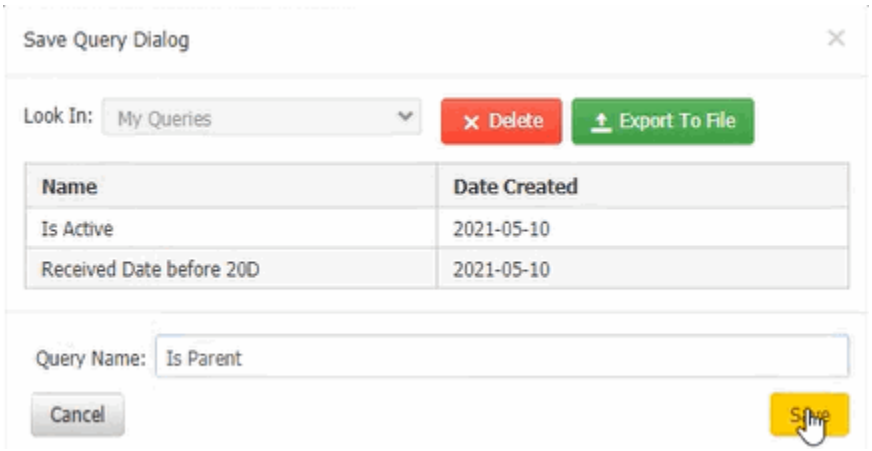


2. In the toolbar, click **Open**, The **Open Query Dialog** box appears.



3. In the **Name** column, click the query and then click **Open**. The query appears on the **Script Query** page.
4. Modify the query.
5. To save the script query, do the following:

a. In the toolbar, click **Save**. The **Save Query Dialog** box appears.



b. Click **Save**.

Tip:

- To save the query with a different name, in the **Query Name** box, type a new name for the query and then click **Save**. The original query remains unchanged and the system creates a query.

9. To export the query, in the **Save Query Dialog** box, click **Export To File**. Script Query file is downloaded.
10. To delete a saved query, in the **Save Query Dialog** box, click **Delete** to delete a saved Script query.

Related Topics

Script Builder

Create an Account Analysis Query

Script Query Conditions

Scripts

Script Query Conditions

Script Query Conditions

Use the **Conditions** pane on the **Script Query** page to specify the criteria for data to include in the query result set.

Related Topics

Create a Script Query Condition

Modify a Script Query Condition

Copy a Script Query Condition

Group a Script Query Condition

Modify the Script Query Condition Order

Delete a Script Query Condition

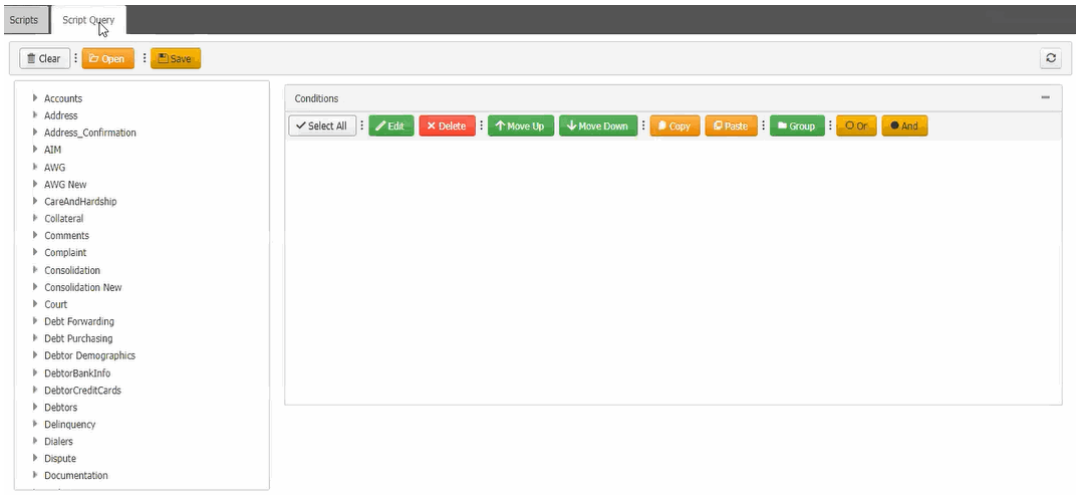
Script Query Condition Types

Create a Script Query Condition

Use the **Conditions** pane on the **Script query** page to specify the criteria for which data to include in the query results.

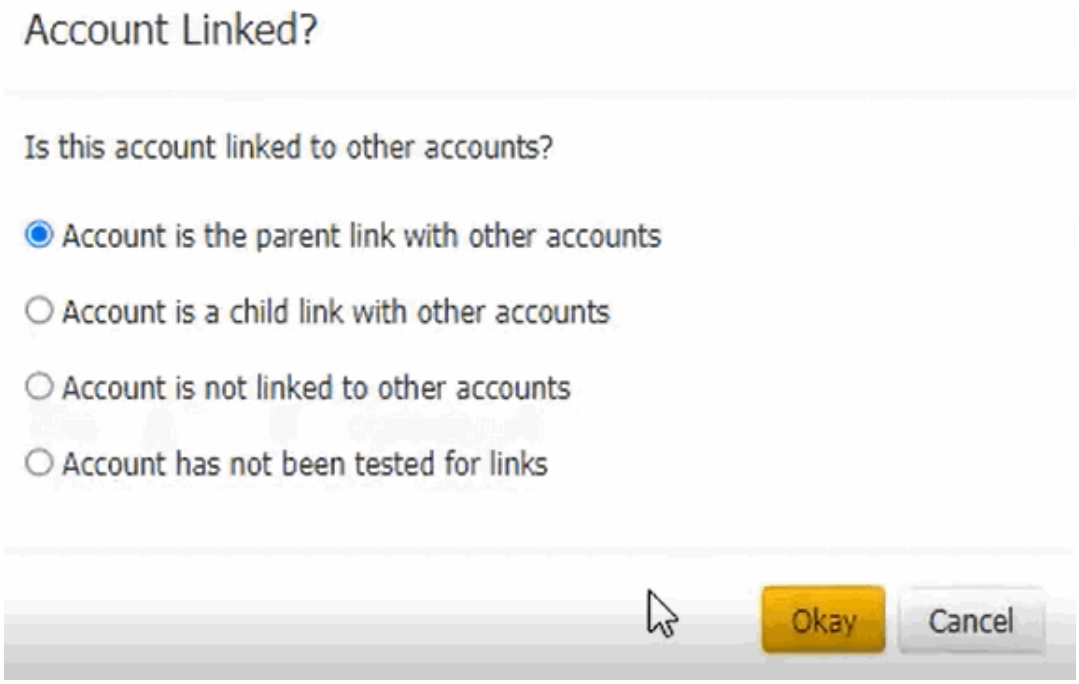
To create a script query condition

1. Ensure that a query is open on the **script query** page.



2. In the **Data Selection** tree, expand nodes to locate the data item to include as a condition.
3. Drag and drop the data item into the **Conditions** pane or right-click the data item and select **Add to Conditions** from the list.

The following example shows the criteria for the **Account Linked?** condition.



4. Specify the criteria, and then click **Okay**.
5. Continue adding conditions as necessary.
6. To apply the And operator, do the following:
    a. After adding the required conditions to the **Conditions** pane, click And.
    b. The **Query Designer** dialog box appears. Click **OK**.

7. To apply the OR operator, do the following:

    a. After adding the required conditions to the **Conditions** pane, click **Or**.

    b. The **Query Designer** dialog box appears. Click **OK**.

Related Topics

Script Query Conditions

Script Builder

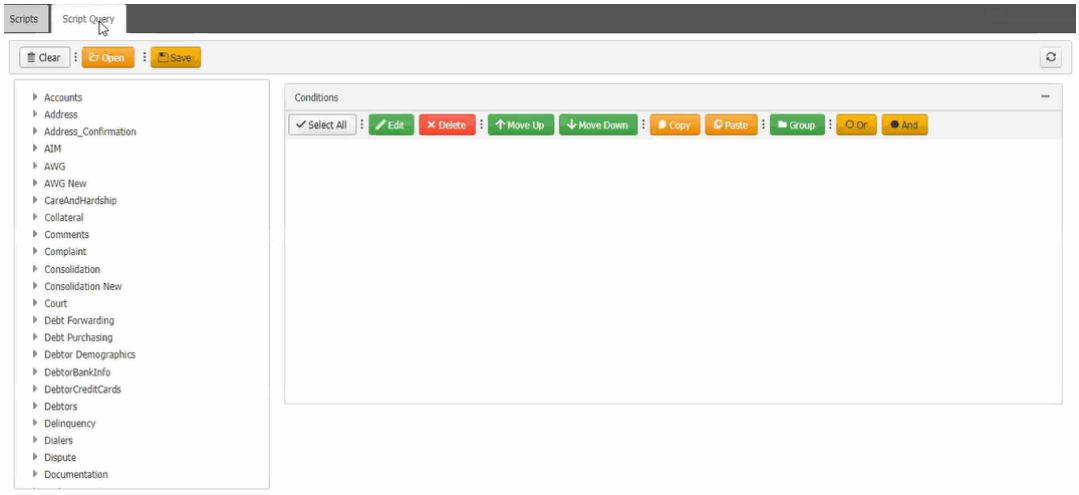
Scripts

Modify a Script Query Condition

Use the **Conditions** pane on the **Script query** page to modify a query condition.

To create a script query conditions

1. Ensure that a query is open on the **script query** page.



2. To add a condition to the **Conditions** pane, do the following:

    a. In the **Data Selection** tree, expand nodes to locate the data item to include as a condition.

    b. Drag and drop the data item into the **Conditions** pane.

3. To modify the criteria for a condition, in the **Conditions** pane, do the following

    a. Click the condition and then click **Edit**.

    2. Modify the criteria and then click **OK**.

4. To apply the And operator, do the following:

    a. After adding the required conditions to the **Conditions** pane, click And.

    b. The **Query Designer** dialog box appears. Click **OK**.

5. To apply the OR operator, do the following:

    a. After adding the required conditions to the **Conditions** pane, click **Or**.

b. The **Query Designer** dialog box appears. Click **OK**.

Related Topics

Script Query Conditions

Script Builder

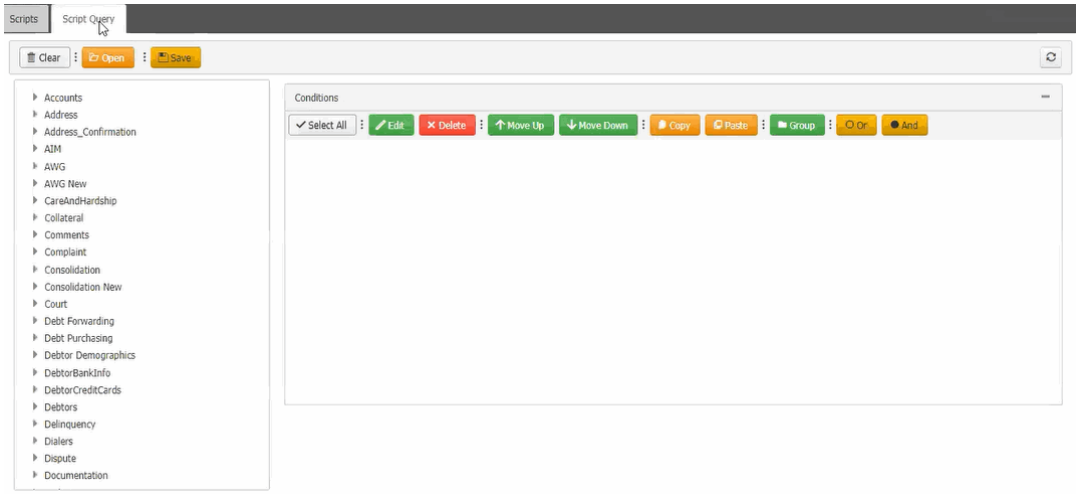
Scripts

Copy a Script Query Condition

Use the **Conditions** pane on the **Script query** page to copy a query condition.

To create a script query condition

1. Ensure that a query is open on the **script query** page.



2. In the **Conditions** pane, click a condition and then, in the toolbar, click **Copy**. The system copies the condition to the clipboard.

3. In the **Conditions** pane, click where you want to copy the condition and then click **Paste**. The system copies the condition to the specified location.

Related Topics

Script Query Conditions

Script Builder

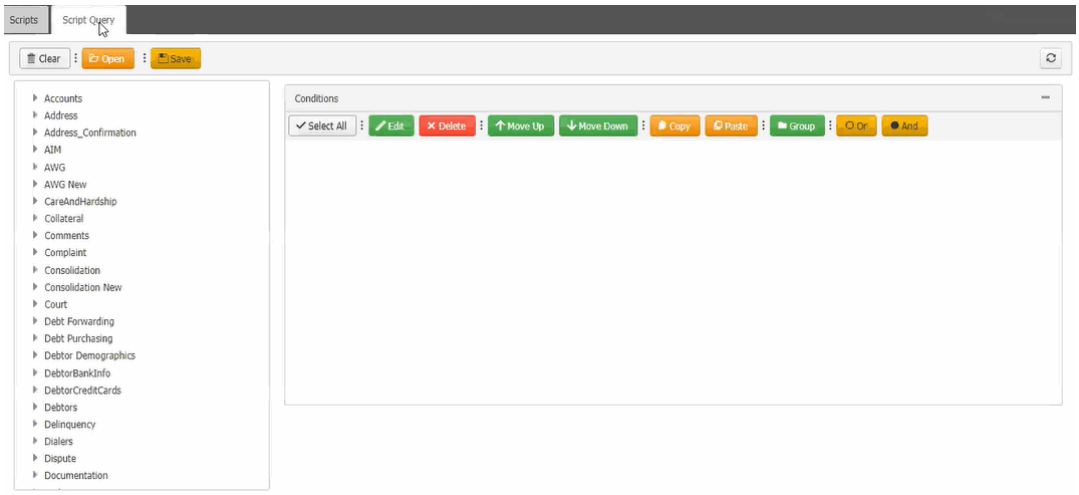
Scripts

Group a Script Query Condition

Use the **Conditions** pane on the **Script query** page to separate conditions into groups when you require complex data mining.

To create a script query conditions

1. Ensure that a query is open on the **script query** page.



2. In the **Conditions** pane, click the condition to group and then click **Group**. The system groups the selected conditions and flags the beginning and ending of the group.

3. Continue grouping conditions as necessary.

Note: To remove a condition from a group, click the condition and then click **Delete**.

Related Topics

Script Query Conditions

Script Builder

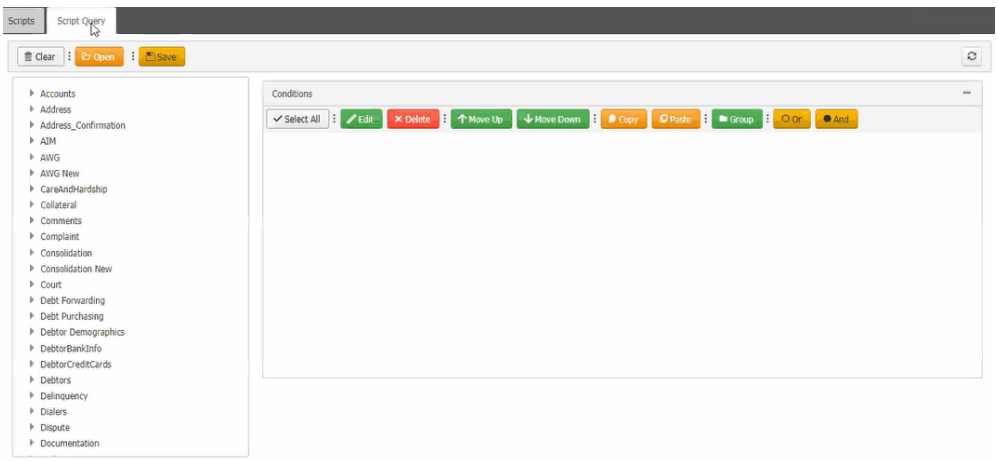
Scripts

Modify the Script Query Condition Order

Use the **Conditions** pane on the **Script query** page to change the order in which the system evaluates conditions.

To create a script query conditions

1. Ensure that a query is open on the **script query** page.



2. In the **Conditions** pane, click a condition and then click **Move Up** or **Move Down**.

Related Topics

Script Query Conditions

Script Builder

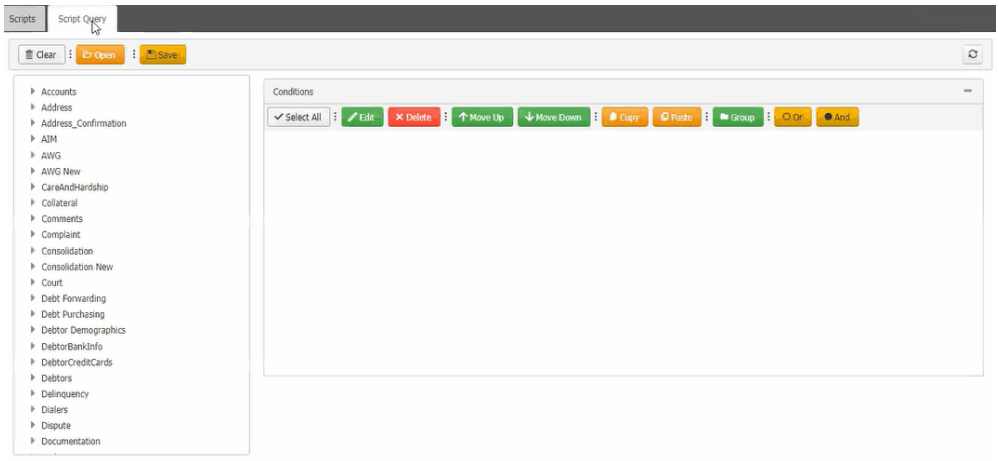
Scripts

Delete a Script Query Condition

Use the **Conditions** pane on the **Script query** page to delete a condition from a query.

To create a script query conditions

1. Ensure that a query is open on the **script query** page.



2. In the **Conditions** pane, click a condition and then click **Delete**.

Related Topics

Script Query Conditions

Script Builder

Scripts

Script Query Condition Types

You use script query conditions when creating queries. For each condition you select for your query, you specify the criteria to use to evaluate accounts. The criteria available is based on the condition type.

Each condition is one of the following types:

- Dates
- Single option
- Multiple option

Dates

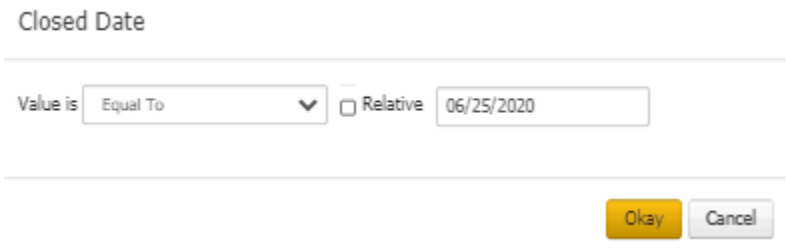
Date conditions allow you to query accounts based on a specific date, date range, any date or blank date, or relative date. When you select a date condition, a dialog box displays to allow you to specify the date criteria. The criteria available depends on the value you select in the **Value is** list box, and whether you select the **Relative** check box.

Specific date

Use one of the following comparisons to evaluate accounts based on a specific date:

Value is	Description	Example
Equal To	Include accounts in the query results where the date matches the date specified.	**Closed Date** is 01/01/2012.
Not Equal To	Include accounts in the query results where the date does not match the date specified.	**Closed Date** is any date except 01/01/2012.
Later Than or Equal To	Include accounts in the query results where the date matches or comes after the date specified.	**Closed Date** is 01/01/2012 or any date after 01/01/2012.
Earlier Than or Equal To	Include accounts in the query results where the date matches or comes before the date specified.	**Closed Date** is 01/01/2012 or any date before 01/01/2012.
Later Than	Include accounts in the query results where the date comes after the date specified.	**Closed Date** is after 01/01/2012, but not on 01/01/2012.
Earlier Than	Include accounts in the query results where the date comes before the date specified.	**Closed Date** is before 01/01/2012, but not on 01/01/2012.

In the following example, the system retrieves accounts where the **Closed Date** is 01/01/2014.

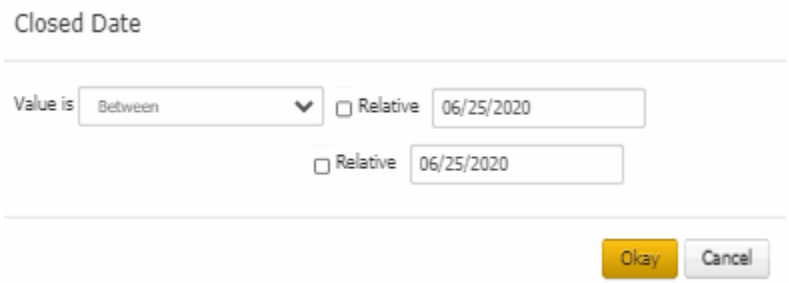


Date range

Use one of the following comparisons to evaluate accounts based on a date range:

Value is	Description
Between	Retrieves accounts where the date falls between two specific dates.
Not Between	Retrieves accounts where the date comes before a specific start date or after a specific end date, but not between the two dates.

In the following example, the system retrieves accounts where the **Closed Date** falls on or between 01/01/2014 and 06/30/2014.



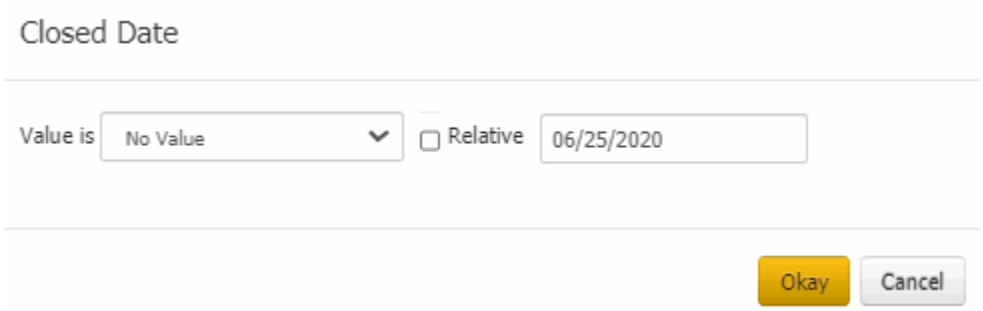
Any date or blank date

Use one of the following comparisons to evaluate accounts based on whether a date is blank or contains any value:

Value is	Description

No Value	Retrieves accounts where the date is blank.
Any Value	Retrieves accounts where the date is any date or blank.

In the following example, the system retrieves accounts where the **Closed Date** is blank (doesn't contain a value).



Relative date

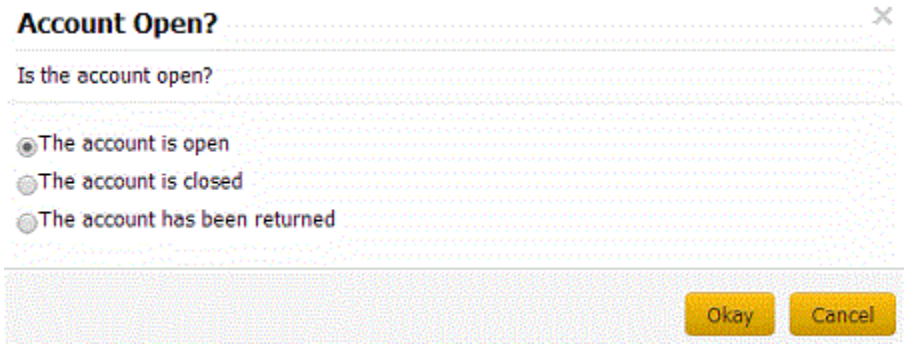
Use the relative date option to evaluate accounts based on the relation of a date to the current date. You specify a comparison and the criteria to use to calculate the relative date. The criteria are the number of days, months or years from the current date, and whether to add or subtract that number from the current date.

Use one of the following comparisons to evaluate accounts based on the calculated relative date:

Value is	**Description**
Equal To	Retrieves accounts where the date matches the relative date.
Not Equal To	Retrieves accounts where the date does not match the relative date.
Later Than or Equal To	Retrieves accounts where the date matches or comes after the relative date.
Earlier Than or Equal To	Retrieves accounts where the date matches or comes before the relative date.
Later Than	Retrieves accounts where the date comes after the relative date.
Earlier Than	Retrieves accounts where the date comes before the relative date.

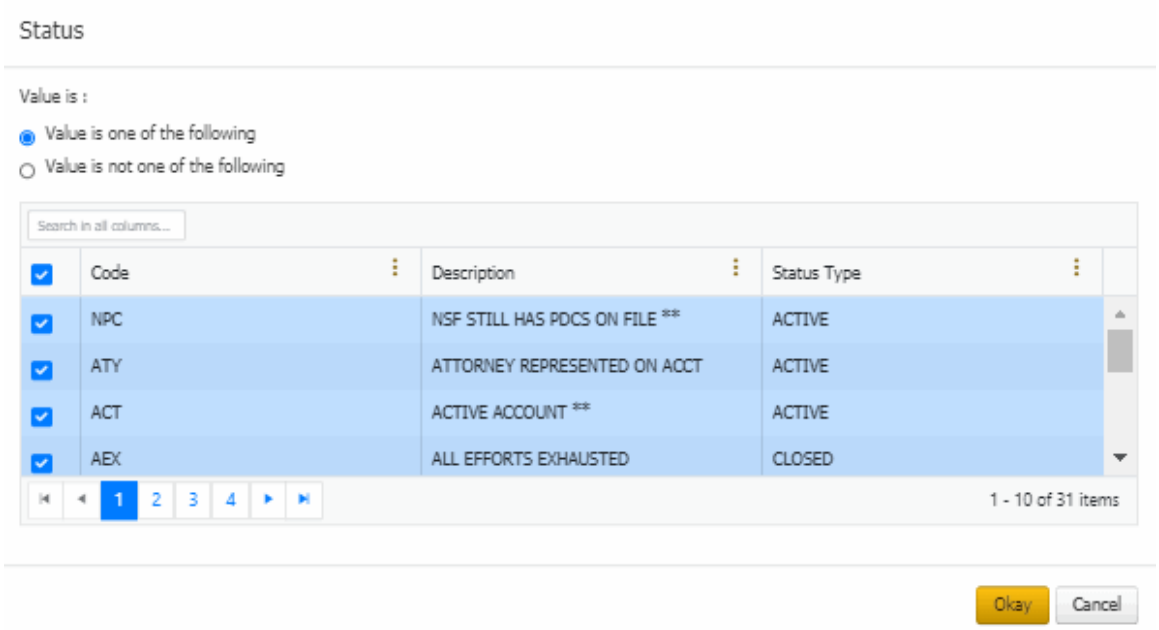
Single option

Single option conditions allow you to retrieve accounts that match a single option in a group of options. In the following example, the system retrieves accounts that are open.



Multiple options

Multiple option conditions allow you to retrieve accounts that match one or more options in a group of options. In the following example, the system retrieves multiple accounts options by selecting the check boxes.



Related Topics

Create a Script Query

Modify a Script Query

Script Query Conditions

Scripts

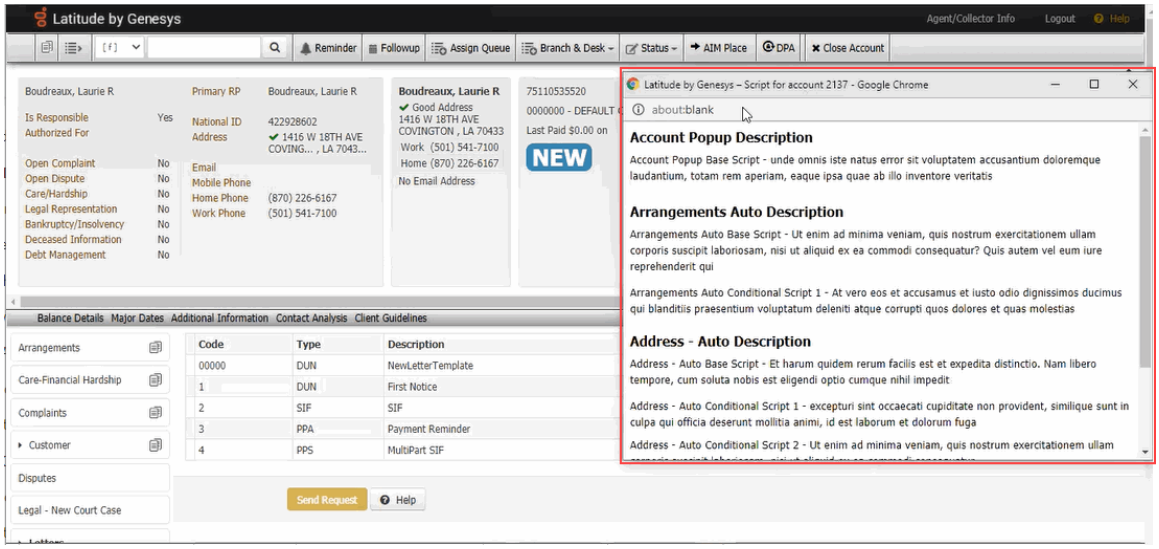
Scripts

Scripts

Use the **Script Query** in the **Scripts** page to create the scripts. Scripts are mapped to task panels and Reference panels.

Scripts are of types, automatic scripts and manual scripts. Automatic scripts appear as soon as we load the work form, and manual scripts appear only when you click icon on the available panels or tabs.

For example, below shown highlighted window is the script window, which is re-sizable by dragging the window and the script account number is displayed in the Script window header.



Related Topics

Create a Script Query

Modify a Script Query

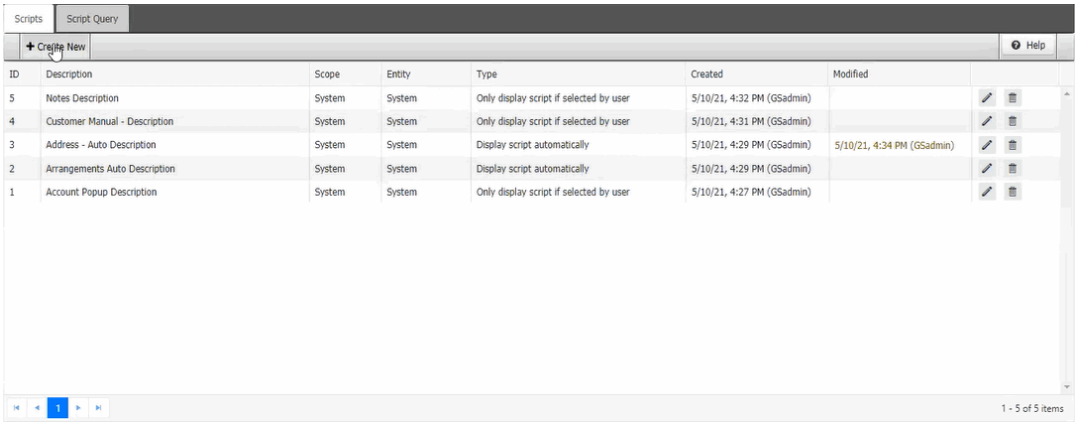
Script Query Conditions

Create a Script

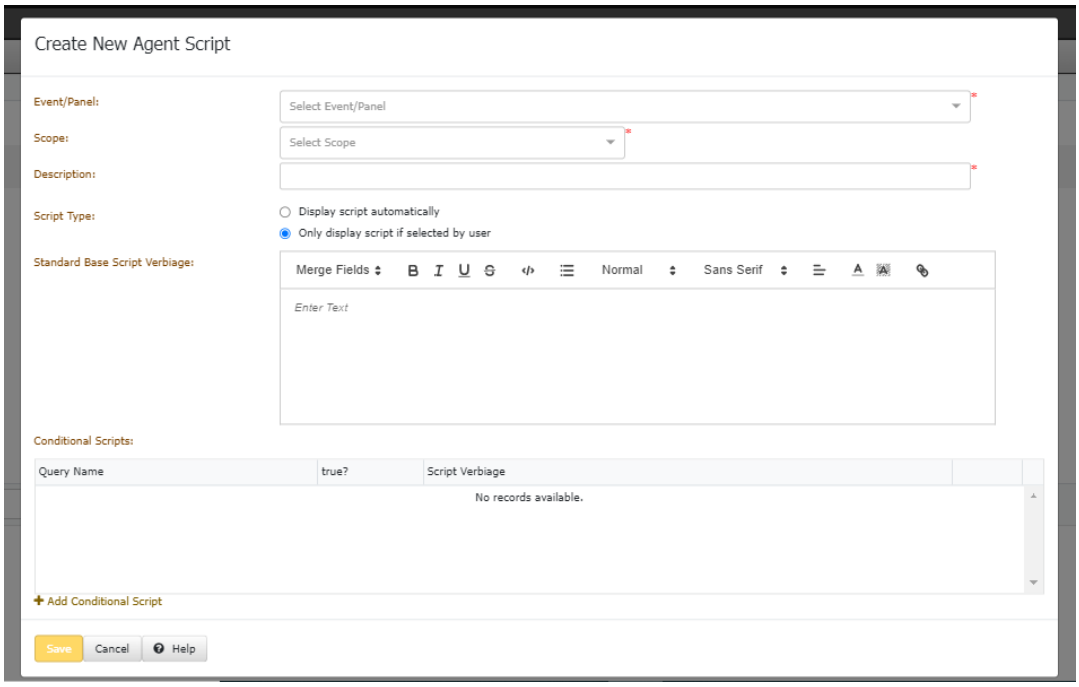
Use the **Script** page to create the scripts using the script query.

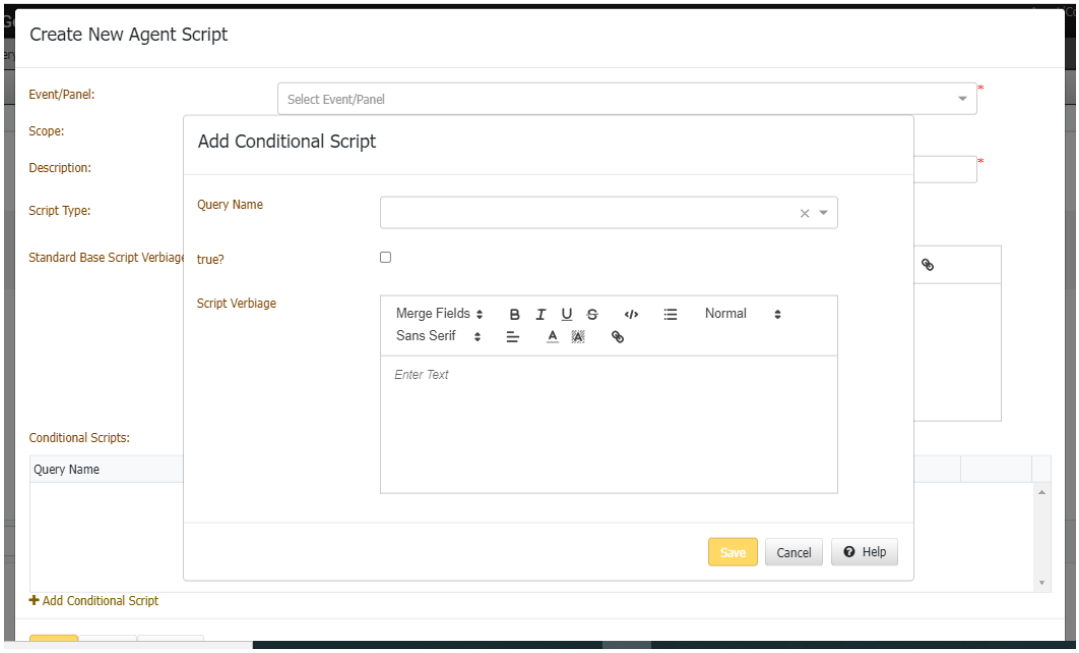
To create a script

1. On the **Welcome** page, click **Script Builder**. The **Script Query** page appears.
2. Click the **Scripts** tab.



3. Click **Create New**. The **Create New Agent Script** page appears.





Event/Panel: All the panel list (like the reference panel, task panels, tabs with the panels)

> Note: If a script is already created for Dispute and if you try to create another one, then an Alert message is displayed.

Scope: Map to any listed role and user

Description: Name of the script

Script Type: Type of the script

Display Script automatically: For Automatic scripts

Only display script if selected by user: For Manual Scripts

Standard Base Script Verbiage: Base script that is mainly the default HTML text with mail merge functionality.

Note: While creating a script you must add base script or conditional script, if not an alert message is displayed.

Conditional Scripts: To create script conditions

Add Conditional Script: To view the saved Queries

Query Name: Name of the query

Result: Check box selected means True, cleared means false.

Note: If you select the Results check box, then if the selected condition is true then only the script is displayed.

Script Verbiage: Script information is the default HTML text with the mail merge functionality.

4. Complete the information and then click Save.

Related Topics

Script Query Conditions

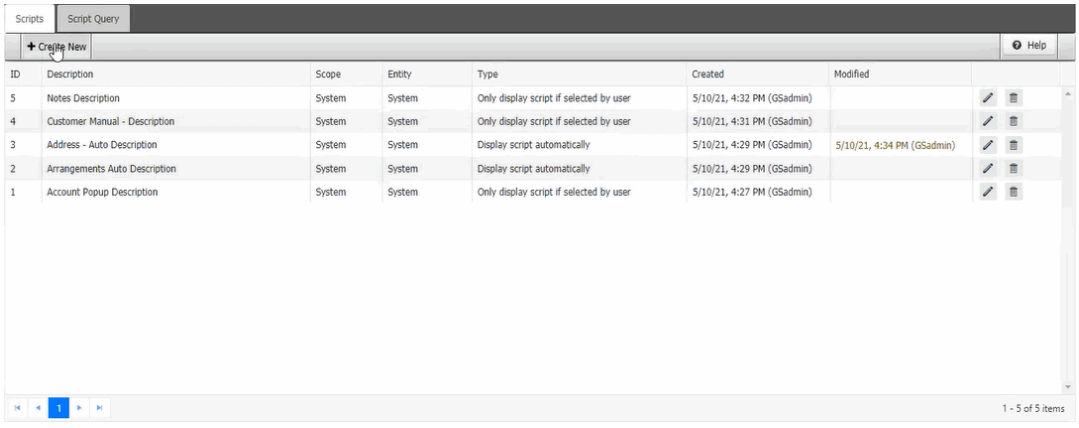
Script Builder

Modify a Script

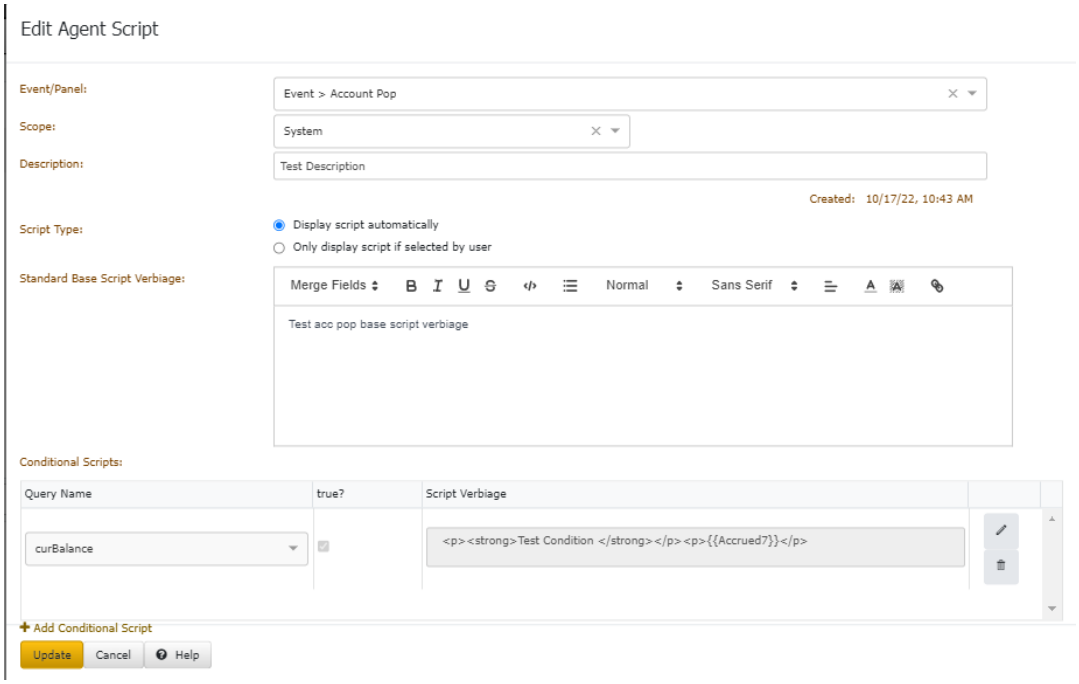
Use the **Script** page to modify the existing scripts.

To create a script

1. On the **Welcome** page, click **Script Builder**. The **Script Query** page appears.
2. Click the **Scripts** tab.



3. Click next to the script. The Edit Agent Script page appears.



Note: You can modify the existing script and also you can add more conditions to the existing scripts.

4. Complete the modifications and then click **Update**.

Related Topics

Script Query Conditions

Script Builder

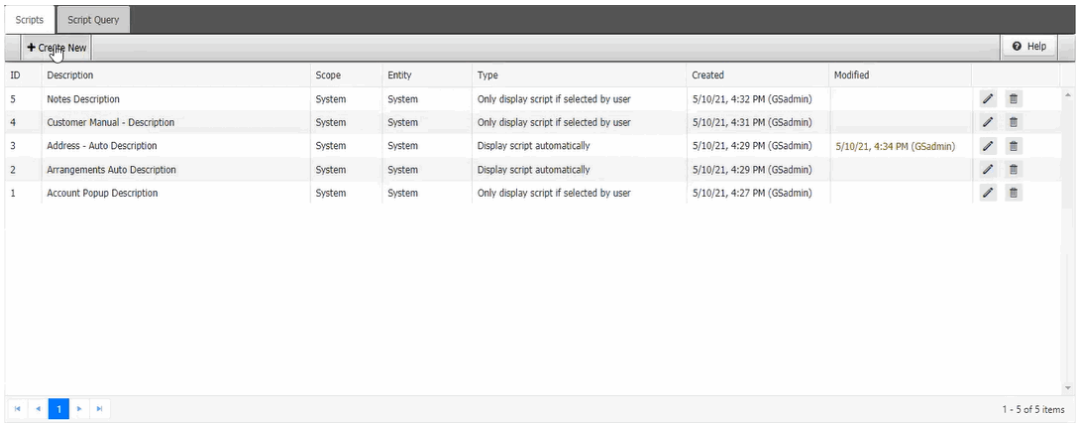
Create a Script

Delete a Script

Use the **Script** page to delete the existing scripts.

To create a script

1. On the **Welcome** page, click **Script Builder**. The **Script Query** page appears.
2. Click the **Scripts** tab.



3. Click next to the script. The script gets deleted.

Related Topics

Script Query Conditions

Script Builder

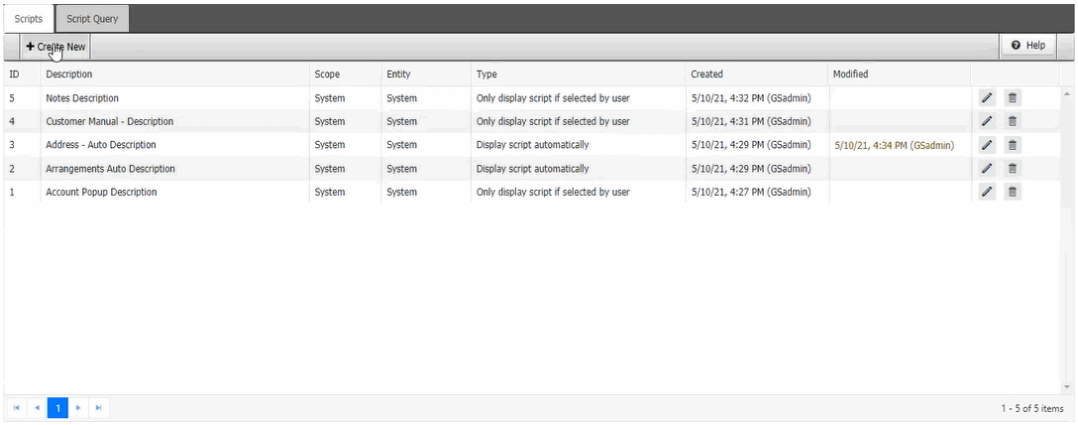
Create a Script

View a Script History

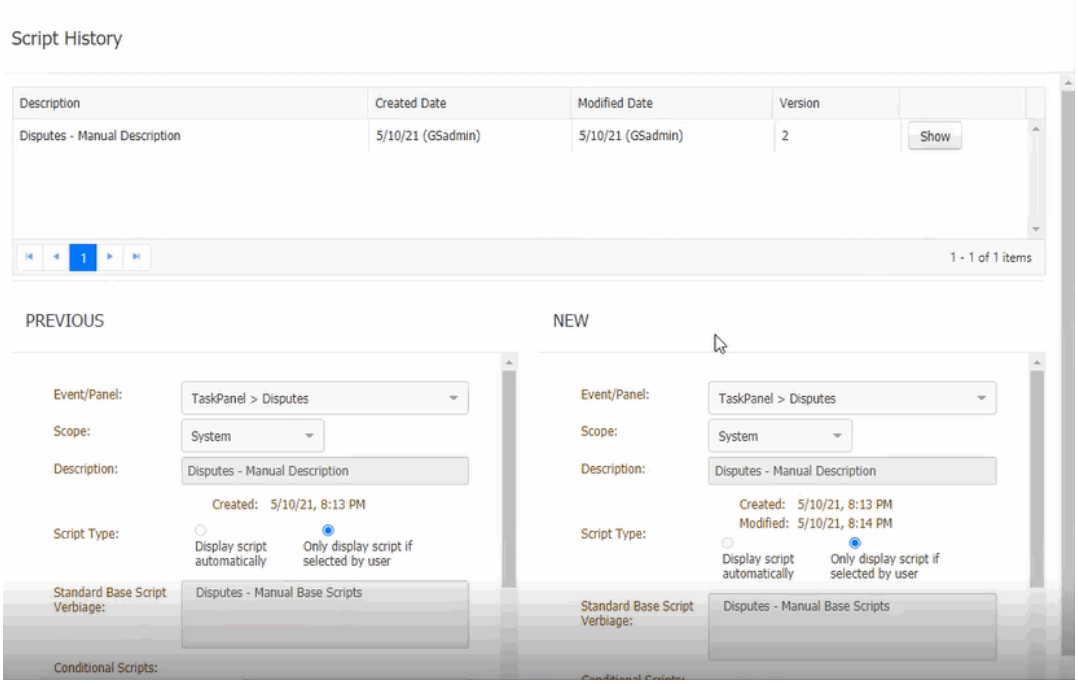
Use the **Script** page to view the existing scripts history.

To create a script

1. On the **Welcome** page, click **Script Builder**. The **Script Query** page appears.
2. Click the **Scripts** tab.



3. Click the date and time in the modified column to view the scripts history. The **Script History** page appears.



Description: Script description

Created Date: Script created on date

Modified Date: Script modified date

Version: latest version

Show button: To show the details of the script.

Previous: Previous script before modification

New: After modified script

Related Topics

Script Query Conditions

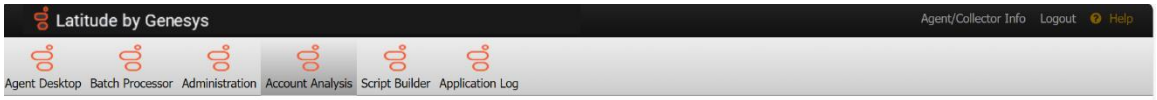
Script Builder

Create a Script

Application log

Application log

It captures All Events based on User, Event Type, From date and To date.



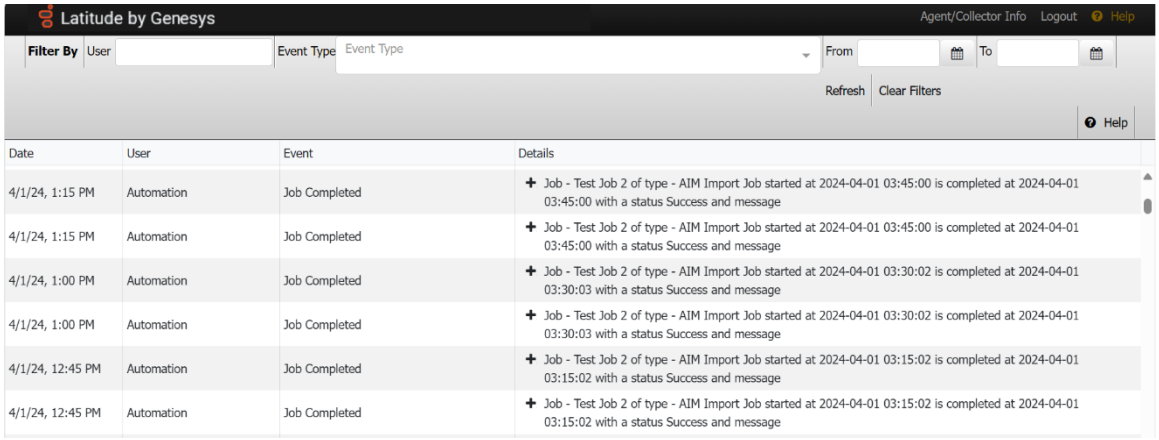
Filter Events

Ability to filter event display by date range in addition to other filters. Start and End date calendar filters are available in addition to the filters of user and

event type.

The following validations are used when using date filters:

- If no dates are selected then all Events matching other filters will be displayed
- If no Start date then display will include all events through the end date
- If no End date then display will include all events through current date.



Data Grids

Feedback

Data Grids

A data grid displays information in a table format (rows and columns). Each row represents a single record and each column represents a single data item. If a column in a data grid contains no data, either the user or the system didn't provide that data. If the number of records in a data grid exceeds the maximum allowed to display on a single page, a navigation bar appears at the bottom of the data grid.

Some data grids allow you to:

- Sort the data by a single column in ascending or descending order. For more information, see Sort Data in a Data Grid.
- Limit the data that displays based on one or more criteria you specify. For more information, see Filter Data in a Data Grid.

Related Topics

Sort Data in a Data Grid

Filter Data in a Data Grid

Move Between Pages of a Data Grid

Feedback

Sort Data in a Data Grid

Some data grids allow you to sort the data by a single column in ascending or descending order.

To sort data in a data grid

1. Click a column heading to sort the data grid in ascending order by that column. An "up" arrow appears next to the column heading.
2. Click the column heading again to sort the data grid in descending order by that column. A "down" arrow appears next to the column heading.

Related Topics

Filter Data in a Data Grid

Move Between Pages of a Data Grid

Data Grids

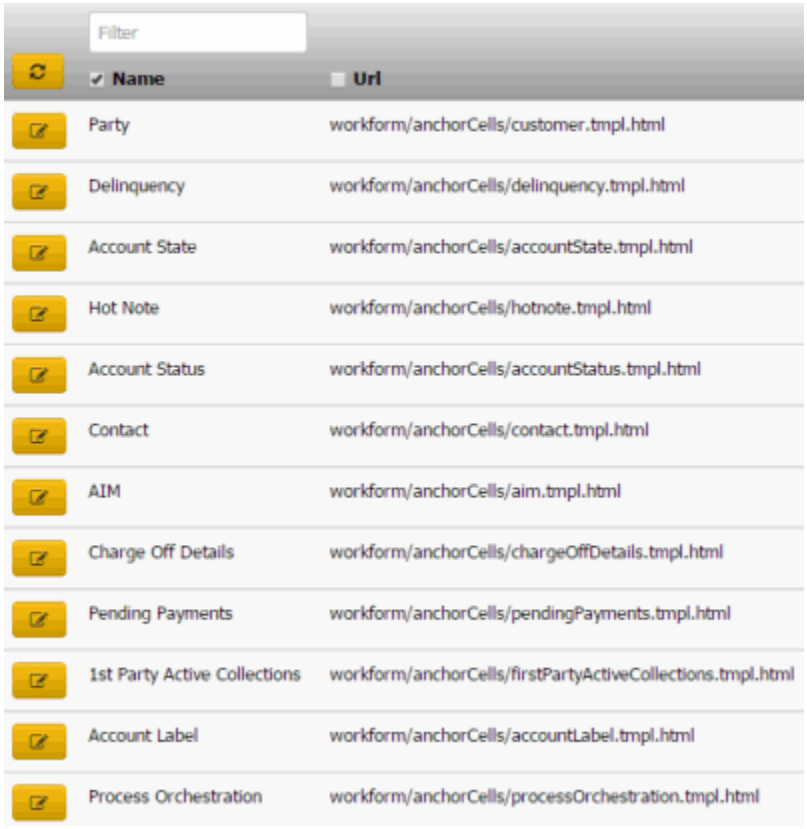
Feedback

Filter Data in a Data Grid

Some data grids allow you to limit the data that displays based on one or more criteria. If you set a filter for a column, the filter icon has a white background color. You can set a filter for more than one column at a time.

To filter data in a data grid

1. Select the check box for the column to set limits. A **Filter** box appears.



2. In the **Filter** box, type one or more characters and then click the Refresh icon. The system only displays the rows that match the specified criteria.

3. To set more filters, select a check box and specify the criteria in the corresponding **Filter** box.

4. To remove a filter, clear the check box and then click the Refresh icon.

Related Topics

Sort Data in a Data Grid

Move Between Pages of a Data Grid

Data Grids

Feedback

Move Between Pages of a Data Grid

Sometimes the number of records in a data grid exceeds the maximum allowed to display on a single page. In that case, the system displays a navigation bar at the bottom of the data grid to allow you to move between pages of the data grid.

To move between pages of a data grid

1. Click a page number to display that specific page.
2. Click **Previous** to display the previous page.
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Related Topics

Sort Data in a Data Grid

Filter Data in a Data Grid

Data Grids

Glossary

A

ABA Routing: (American Bankers Association Routing Number) Nine-digit code that identifies a financial institution.

Account Scoring: Process of establishing the probability of collecting on an account.

Accounts Receivable: Money a customer owes for products and services provided on credit. A sale typically becomes an accounts receivable after the company invoices the customer.

ACH: Automated Clearing House. Secure payment transfer system used to send wire money transfers for customer payments or client invoices.

Action Code: Two-character code that identifies the work performed on an account. Action codes are attached to notes.

Age-based Fee: Accounts set up with age-based fee schedules accumulate collection fees based on an account date. The system increases or decreases at specific aging intervals the percentages charged for collections on accounts. For example, the system calculates a certain percentage of the amount collected for the first 30 days the organization holds the account, and another percentage for the 30-60 day period.

Amortization: Gradual pay-down of the principal amount of a debt.

Automated Clearing House: See ACH.

C

Credit Bureau: Credit bureau (such as Equifax, Innovis, TransUnion, or Experian) that provides credit reports on customers.

CUBE: An online data mart/data warehouse that provides multidimensional views into transaction-level data for improved data mining.

Custodian: Interaction Collector program that allows you to build daily work queues, schedule letters, calculate interest, process promises, perform account calculations, clean invalid data, and process any other nightly tasks your organization requires.

D

DA: Decreasing Adjustment. Changes to an account that decrease the balance on the account. Interaction Collector doesn't calculate fees against these amounts for your organization and doesn't reflect these amounts on invoices.

DAR: Decreasing Adjustment Reversal. Changes to an account that increase the balance on the account. Interaction Collector doesn't calculate fees against these amounts for your organization and doesn't reflect these amounts on invoices. Also known as, Increasing Adjustment.

Data Mining: Use of analytics capabilities to analyze data to identify trends and causal factors.

Debtor: Responsible parties on charged-off accounts in recovery. Also known as "customer."

Decreasing Adjustment: See DA.

Decreasing Adjustment Reversal: See DAR.

Desk: Your organization can use desks or desk codes to group accounts for collection or other activity in Interaction Collector. Your organization assigns users to the desk holding the accounts that you want users to work.

Desk Type: Desk type determines the type of accounts the desk holds. Your organization specifies the desk type when creating or modifying the desk. There are five types of desks: Administrator, Clerical, Collector, Inventory, and Supervisor.

Dollar-based Fees: Accounts set up with dollar-based fee schedules accumulate collection fees based on account balances. For example, Interaction Collector calculates a certain percentage for accounts with a balance of $1,000.00, and another percentage for accounts with balances over $1,000.00 but not over $1,500.00.

E

Extra Data: Fields that your organization can create to capture custom data. Each segment of extra data that your organization creates has a unique code and can contain up to five separate fields. Extra Data is not the same as Miscellaneous Extra Data.

G

Gross Client: Client who receives the full payment amount that your organization collects. The client subtracts the collection fees and remits them to your organization.

I

Increasing Adjustment: See DAR.

Inventory Desk: Desk that holds accounts for distribution to users.

Invoice Group: Invoice groups contain two or more clients, one of which you designated as the parent client, and the rest as child clients. You can associate a client to one invoice group only. When you generate an invoice for a parent client, the system includes all payments for the parent and child clients.

J

Joint Account: Account with more than one responsible party.

L

Law List: Law lists provide a membership base of collection attorneys for organizations that require a legal means in which to collect their accounts receivables.

Letter Console: Interaction Collector program that allows you to generate letters for accounts.

Liable Party: See Responsible Party.

Linked Account: Account connected to one or more other accounts that belong to a responsible party.

M

Miscellaneous Extra Data: Miscellaneous information that your organization can attach to an account. Generally, your organization receives this information from a customer and imports it into Interaction Collector. Miscellaneous Extra Data isn't the same as Extra Data.

Money Bucket: A category used to group dollar amounts associated to an account (for example, principal, interest, collection costs).

N

Net Client: Client who receives a net amount of the payment amount that your organization collects. Your organization subtracts the collection fees and remits the remainder to the client.

NITD: Notice of Intent to Deposit. Letter to notify the client that your organization is depositing a post-dated check or paper draft.

Notes: Notes that you add to Interaction Collector to track activity on an account, or that Interaction Collector creates to record changes to data.

Notice of Intent to Deposit: See NITD.

O

Online Checks: See Paper Draft.

P

PA: Paid Agency. Payment to an outside collection agency that collects account money for your organization.

Paid Client: See PC.

Paid Client Reversal: See PCR.

Paid in Full: See PIF.

Paid Us: See PU.

Paid Us Reversal: See PUR.

Paper Draft: Transactions that create payment checks using bank account information. Your organization prints checks using Direct Check software and deposits them into your organization's or the client's trust account.

PAR: Paid Agency Reversal. Reversal of a payment to an outside collection agency that collects account money for your organization where the check did not clear.

Payment Reversal: See PAR.

PC: Paid Client. Payment that the customer sends to your organization for an account that an outside collection agency or attorney holds. The outside collection agency or attorney receives a fee for the payment.

PCR: Paid Client Reversal. Reversal of a payment that the customer sent to your organization for an account that an outside collection agency or attorney holds where the check didn't clear.

Personal Unique Record Number: See PURN.

Phone Number Format: Interaction Collector does not format phone numbers, and allows any character. We recommend that your organization set guidelines for entering phone numbers to ensure consistency when searching and reporting on accounts.

Phonetic Name Search: Search that uses an algorithm to break a name into a phonetic key based on the consonants. Phonetic matching is useful when a user doesn't know the exact spelling or it varies. For example, searching on "John" finds the name "Jon." Keep in mind that the system doesn't match partial phonetic keys. For example, searching "John" does not find "Johnny."

PIF: Paid in Full. The client considers the debt as paid in full.

PU: Paid Us. Payment that the customer sends to your organization. If an outside collection agency or attorney holds the account, the agency or attorney receives a fee for the payment.

PUR: Paid Us Reversal. Reversal of a payment that the customer sent to your organization where the check didn't clear. If an outside collection agency or attorney holds the account, the agency or attorney refunds the fee received for the payment.

PURN: Personal Unique Record Number. Alphanumeric code that uniquely identifies a person on an account.

Q

Queue: Group of accounts that a specific desk works.

Queue Level: Three-digit numeric code assigned to an account to represent its status within the queue.

R

Repossession: A creditor's right to take possession of a vehicle and sell the vehicle to recoup money on a defaulted loan.

Responsible Party: Person with a legal obligation to pay on an account. Interaction Collector allows your organization to associate multiple responsible parties to an account and specify demographic information for each party.

Result Code: Two-character code assigned to notes to classify activity on an account. Your organization can customize standard result codes. Interaction Collector uses result codes to track the number of accounts each collector worked and contacted.

Role: Roles define the security levels for each type of user. Your organization must assign a role to each Interaction Collector user.

S

Service Request Gateway: See SRG.

Settled in Full: See SIF.

SIF: Settled in Full. An account balance that your organization settled for less than the amount owed.

Sole Account: Account with a single responsible party.

Sole Responsibility: One party on a joint account is solely responsible for payment on the account.

SRG: Service Request Gateway. Allows users to request services from vendors, such as a credit reporting vendor. SRG uses Tokenizer to provide a secure connection between your organization and the vendor. SRG requires a separate plug-in for each vendor your organization uses.

Status Code: Three-character code that indicates the state of an account and whether it is active or closed.

Surcharge: Amount charged in addition to the calculated arrangement amount. The surcharge doesn't affect the net applied amount or further projection of the account balance.

T

Tokenization: The process of substituting tokens for actual data when exchanging sensitive data with vendors.

Tokens: Symbolic representations of account data that Interaction Collector stores in the database in place of the actual data.

Trust Account: Bank account that your organization uses to retain deposits received directly from customers, or deposits that clients received from customers and then forwarded to your organization. You can associate a trust account to one or more clients.

U

User: Code that identifies a person using Interaction Collector.

W

Wallet: Allows users to add a reusable payment instrument (credit card, ACH, or paper draft) for a customer and use it for immediate or future payment transactions. Interaction Collector associates the payment instrument to the customer, not the account.

Work Form: Main page in Interaction Collector that is the primary source of information. Most of the key information required when working an account is available in the Work Form.

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