



INTERACTIVE INTELLIGENCE
Deliberately Innovative

New Features for:

Release:Liquid Latitude 22.2
Built on:02-Nov-2022

New features included in release 22.2

The table below summarizes the new features added in this release

SCR **Description/Details**

Component: Liquid Center

LIQ-9019	Required to implement the desk change feature in PaymentHistory Panel Implemented the functionality to change the desk and filter the desks based on code and branch and sort the desks using the name ,code and branch.
LIQ-8949	User is not able to set account wise settlement percentage. If the linked accounts are of different customers then it should display minimum settlement percentage which is configured in administration for that customer Fixed the issue by providing the a popup screen before proposing the payment, this popup will display on click of 'Configure Settlement' button. This button will be visible only if the multiple accounts are selected for settlement type of arrangement. Using this popup user can set account wise settlement percentage. That settlement amount will be used for the arrangement creation
LIQ-8032	Job Manager unable to fetch the bulk case updates and update the RDN tables as expected. Also, while fetching the latest updates on a case, the system throws an error. Updated the service to enable the Job manager to fetch case updates and update RDN tables accordingly. Fixed the error while fetching case updates manually on RDN Integration task panel.

Component: Liquid Portal

LIQ-9561	Add a record in Notes for identified Events For a set of identified events, a note will be added every time these events are posted. The Action and Result Codes for the Note will be picked up from the Event Template and the Comment will be same as the Event Summary. This will enable customers to easily query events data from the Notes table. Also, AIM CPLC, CNOT and ANOT files will fetch Notes & Events data from Notes table alone. Events data in Notes table can be identified using the EventId column. NOTE: If there are any events created before this ES is installed and do not have a corresponding Note record, such Events will not be present in the AIM files. In order to ensure that there is no data loss, a migration script will need to be run to migrate the existing data from Events table to Notes table. The migration script named "LiquidMigration_EventsToNotes_PostScript.sql" is committed in the source code under the DBUpdateScripts folder. Please reach out to DEV before running this script.
LIQ-9459	For reminder letter list in review letters, application is fetching only a default letter not the letters mapped the corresponding customer Earlier it was fetching 1 default letter so changed the logic , now it fetching Reminder letters which are mapped to the respective customer, also saving the LetterCode selected
LIQ-9436	Added trigger named trg_Deceased_WorkFlow_SystemEvents_Deleted in the Deceased table. Added trigger trg_Deceased_WorkFlow_SystemEvents_Deleted to deceased table so that workflow_events is triggered when a deceased record is deleted.
LIQ-9390	Display System Events in Application Log Utility A new utility called Application Log has been created to display non-account/system events. This will be displayed if the permission Access Application Log is enabled in the Administration page
LIQ-9389	Integration of Mail Merge functionality in Script Builder Mail merge fields can now be used in the Base Verbiage and Conditional Verbiage scripts in the Script Builder utility

LIQ-9388	<p>Infinite Scroll and accurate Grouping in Account Analysis</p> <p>Account Analysis now displays results using infinite scroll similar to how data is displayed in the events panel. Also, some changes have been made to accurately display results based on user selected grouping</p>
LIQ-9387	<p>Send Email/SMS from Email/Phone Context Menu for current and future dates</p> <p>Similar to how an email/SMS is sent from the Communication Task Panel, it can also be sent from the Email/Phone context menu for today's date as well as future dates. All future date emails/SMS'es can be sent in bulk by calling the "SendScheduledEmailSMS" API</p>
LIQ-9386	<p>Email and Address Grids in Customer Task Panel</p> <p>Email and Address grids are now displayed in the Customer Task Panel similar to how Phone grid is shown. All actions that can be performed from the Email and Address reference panels can also be done from the Customer Task Panel</p>
LIQ-9299	<p>Set required localization contexts for both Account and User preferences</p> <p>Created / modified existing services to accommodate the below:</p> <p>When the user is not logged, the preferences set at System level should be used. This is mostly applicable only to the login page.</p> <p>Once the user logs in, the language pack and date / time formats should be based on User → Role → Branch → System levels</p> <p>Once an account is loaded, the Currency symbol and default phone number format should be based on the Client → Client Group → Line of Business → System levels.</p>
LIQ-9298	<p>Application to consider User and Account preferences to set Language, Date, Phone and Currency preferences based on user actions</p> <p>Updated existing filters in the application to work with Localization settings in Administration.</p> <p>Based on the setting defined at either User / Roles / Branch / System level, as per the existing priority, when the user logs in, the selected date and time formats will be pulled from preferences and used</p> <p>Updated the application to pull the Phone and Currency preferences when switching between accounts and use them to display and phone numbers and Currency symbols accordingly.</p>
LIQ-9293	<p>Create new permissions to accommodate Localization settings at Account level and User level</p> <ol style="list-style-type: none"> 1. Created a new main level folder - "Localization" 2. Created a sub folder Account Data under Localization to capture account related settings. Settings Applicable for this are: <ol style="list-style-type: none"> a. Currency symbol and currency formatting b. Default phone number formatting <p>Scope for Account Data is Client → Client Group → Line of Business → System levels</p> 3. Create sub folder User Interface under Localization to capture settings specific to the user context. Settings applicable for this are: <ol style="list-style-type: none"> a. Language pack selection for UI b. Localization setting for the display of dates and times (currently in General Settings / Localization) <p>Scope for User Interface is User → Role → System levels and at Branch level.</p>
LIQ-9292	<p>Unable to set monthly recurrence date past 28th.</p> <p>When establishing a payment arrangement with a frequency of Monthly can only select 1st through 28th of the month. Now able to set through the 31st. If the month has less than 31 days the payment is scheduled for the last day of the month.</p> <p>TransUnion, Experian, and Equifax are making changes to Medical Debt Collection Data. Attached is a summary of each initiative, impacted furnishers, furnisher action, and the effective dates.</p>
LIQ-9229	<p>Latitude will need to make changes to the credit reporting functionality within its application(s) to comply with these new requirements.</p> <p>Attached the document sent from the customer.</p> <p>Modified the process to prevent reporting medical accounts until after 365 days since date of delinquency</p>
LIQ-9126	<p>Bootstrap 4 Upgrade</p> <p>Upgraded the front-end application to use latest Bootstrap 4 features and components</p>
LIQ-9116	<p>When the agent is on call with a customer, there is no way for the agent to refresh communication panel to fetch any EMail / SMSes that the customer has sent</p> <p>Provided a refresh option on the communication panel so that Agent can force refresh the communication panel to fetch any EMail / SMSes that are received after the account is loaded.</p>
LIQ-9107	<p>Upgraded the core modules to Angular 13</p> <p>Upgraded the core node modules to Angular 13 which enabled upgrading of recently developed client side components to Angular 13</p>

- LIQ-9017** **View and Upload Documentation in Self Service Portal**
View and upload any documents using the Self Service Portal application if enabled in the Administration section
- LIQ-9016** **Set up an arrangement in Self Service Portal**
Set up a single payment arrangement or a payment plan based on a frequency and make a payment using the Self Service Portal application, provided that these actions are enabled in the Administration section
- LIQ-9015** **Mainain wallet information in Self Service Portal**
Add new card/banking instruments, edit address on a wallet item and delete any instrument that is not part of an active arrangement using the Self Service Portal application. These actions can only be performed if enabled in the Administration section
- LIQ-9014** **Personal/Demographic Information in Self Service Portal**
View, add and update phone numbers, addresses and emails along with consent and preferences in the Self Service Portal application provided the actions have been enabled in the Administration section
- LIQ-9013** **View Account Details and Payment History in Self Service Portal**
Below can be viewed in the Self Service Portal application
1. Account Details like Current Balance, Customer Name and Account Number
2. Payment History Details like Paid Amount, Paid Date and Pay Method
- LIQ-9012** **Authentication and Permission related changes for Self Service Portal**
1. Added new permissions in the Administration page (Applications -> Self Service Portal) to:
a. Select Authentication options which are used at the time of registering a Portal user (Authentication)
b. Customize the colors and theme of the Self Service Portal application (Customization)
c. Configure the actions that can be performed in the Self Service Portal application (Configuration)

2. Below are some of the changes implemented for Authentication and Authorization
a. Only users that have been registered can access the Self Service Portal
b. Registration is based on the options set in the Portal Authentication permission in the Administration page. An email verification code also needs to be entered at the time of registration
c. All successful and unsuccessful login attempts are tracked
d. Only actions configured in the Portal Configuration permission can be performed by the user in the application
- LIQ-8782** **As a business I need to be able to track table fields for New Business & Maintenance**
If new table – add table fields to Exchange schemas for New Business & Maintenance
Exchange Schema is modified to add Historical Transactions for New Business and Maintenance
- LIQ-8627** **Currently Surcharge is being able to set as flat amount. Need it to be set as a Percentage also.**
Surcharge for particular payment methods needs to be set as surcharge as a percentage which takes the same flat amount as a percentage. If the Surcharge Percent checkbox is checked, Surcharge will be considered as percent and will be shown as % in Arrangement Window.
- LIQ-8319** **Create a table named dbo.HistoricalTransactions and Create a Reference panel to show the data from dbo.HistoricalTransactions**
Added HistoricalTransactions Table with required columns and added a custom reference panel for Historical Transactions.
- LIQ-8317** **AIM changes to be able to export Historic Transactions with new record CHST under CPLC placement file.**
CPLC placement file contains new record type named CHST which holds the historic transactions