Fusion

Printable Help

Version 2024 R1

Last updated May 15, 2024

Abstract

This document is a printable version of Fusion help.

Table of Contents

Introduction to Fusion

Fusion works with the Latitude database to create request files and process returned information from outside service providers. The **Fusion Wizard** walks you through the setup process for sending files to, and receiving files from outside services.

Contact Latitude by Genesys Support for information and file layouts for specific products. Generally, we support the latest version of each vendor product.

Install Fusion on the workstation where you are going to create requests and receive outside service information. The Fusion install includes the Exchange program. The Latitude database requires an update when installing new versions of Exchange and Fusion.

You can use Job Manager instead of Fusion to set up automated processing to search for returned files. However, return file mappings defined in Exchange apply to both Job Manager and Fusion.

You can set the minimum balances for accounts to include in each service at the service or customer level.

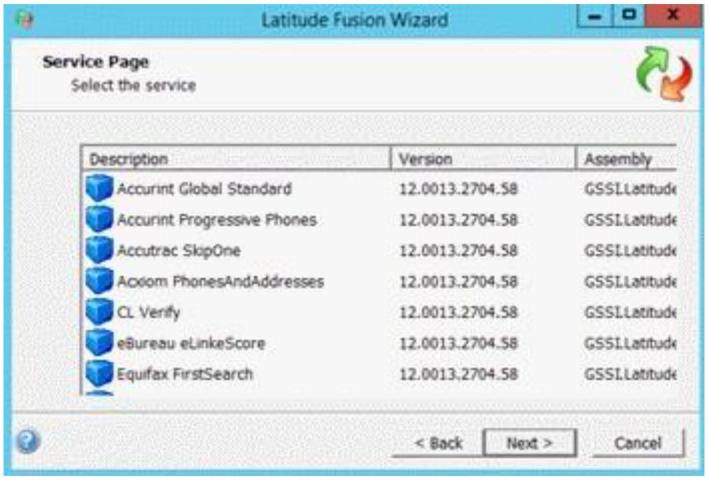
Create a Request File

Use the **Fusion Wizard** to create a request to send files from Latitude to an outside service.

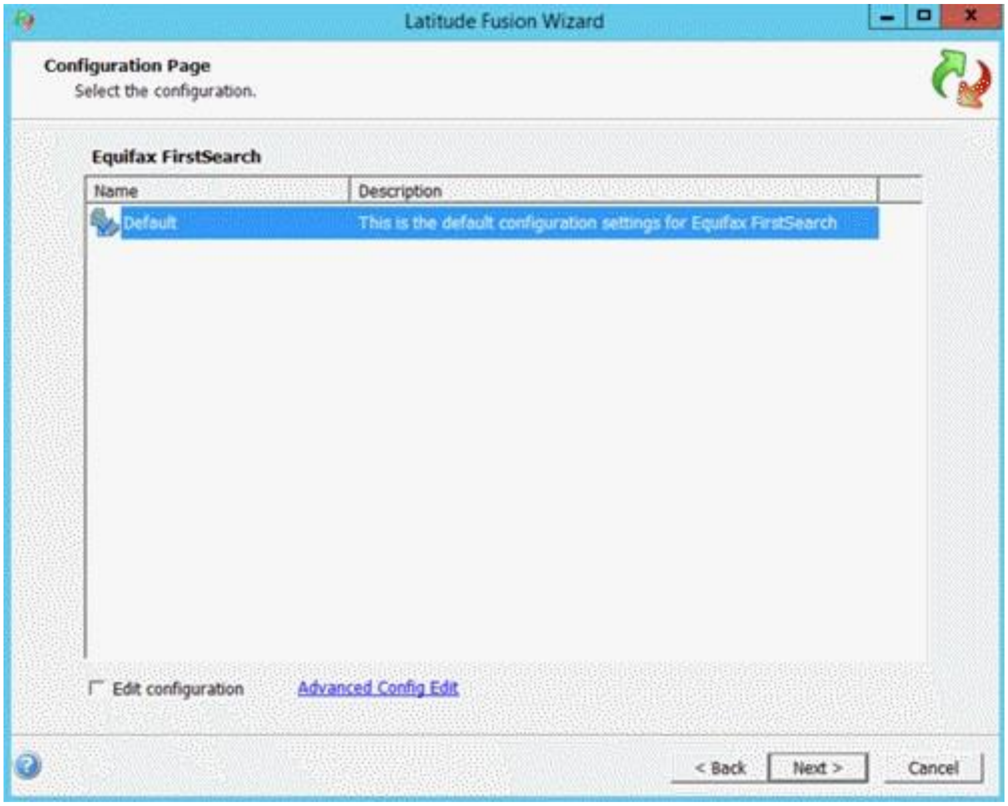
To create a request file

1. In the **Welcome to the Fusion Wizard** page, click **Next**. The **Service Page** appears.

   Note: The following is an example only.

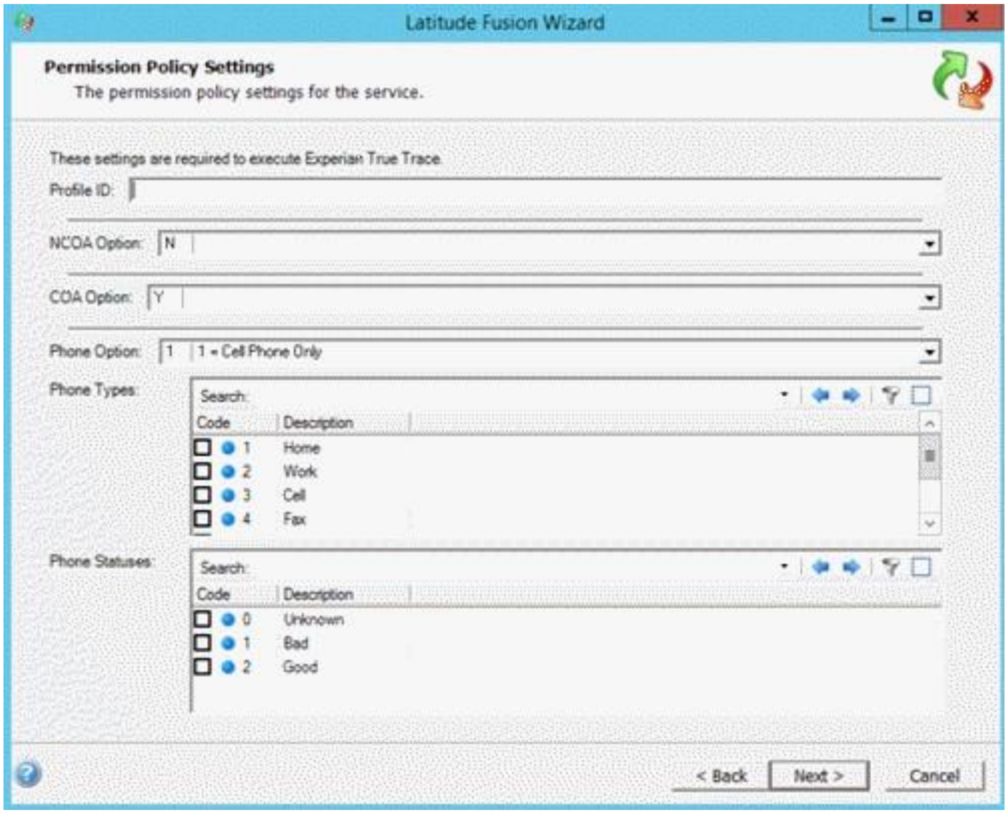


2. Click a service and then click **Next**. The **Configuration Page** appears. Typically, **Default** is the only option available.



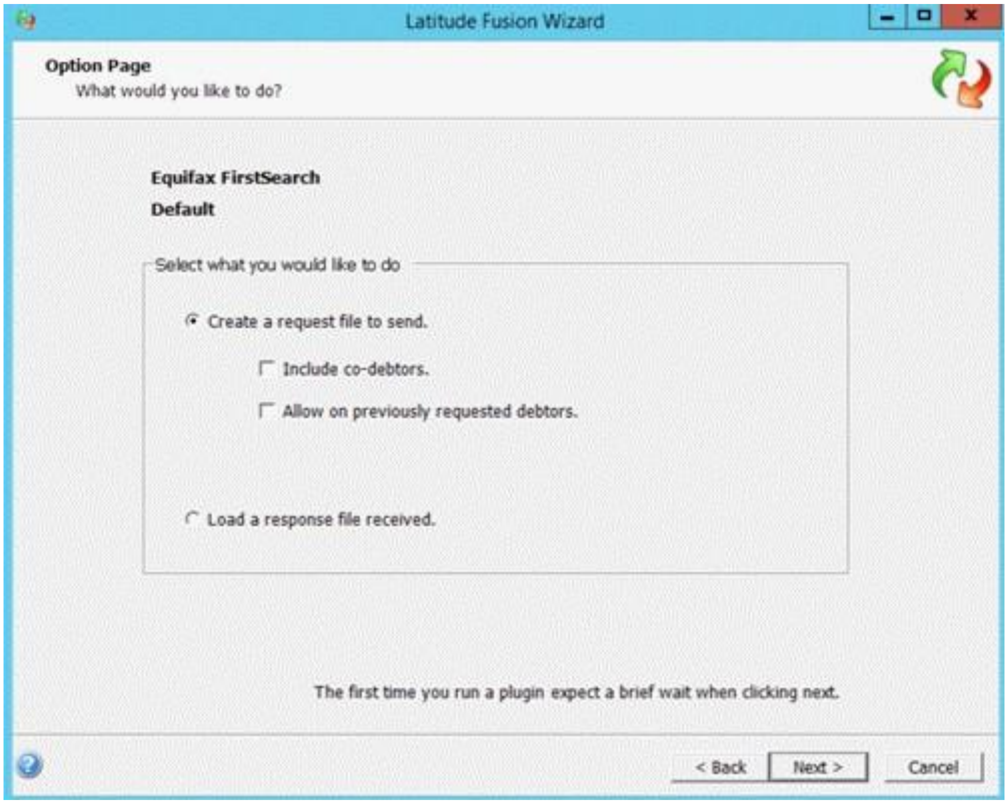
Note: If you are running the wizard for the first time, the **Edit configuration** and **Advanced Config Edit** options don't appear.

3. Click the configuration setting and then click **Next**. If you are running the wizard for the first time or you selected the **Edit configuration** check box, the **Permission Policy Settings** page appears.



The permission policies shown are for example only. The options available depend on the service that you selected previously. To obtain specific instructions and values to identify your organization and specify product options, contact your vendor.

4. Specify the policy settings that you received from your vendor representative and then click **Next**. The **Option Page** appears.



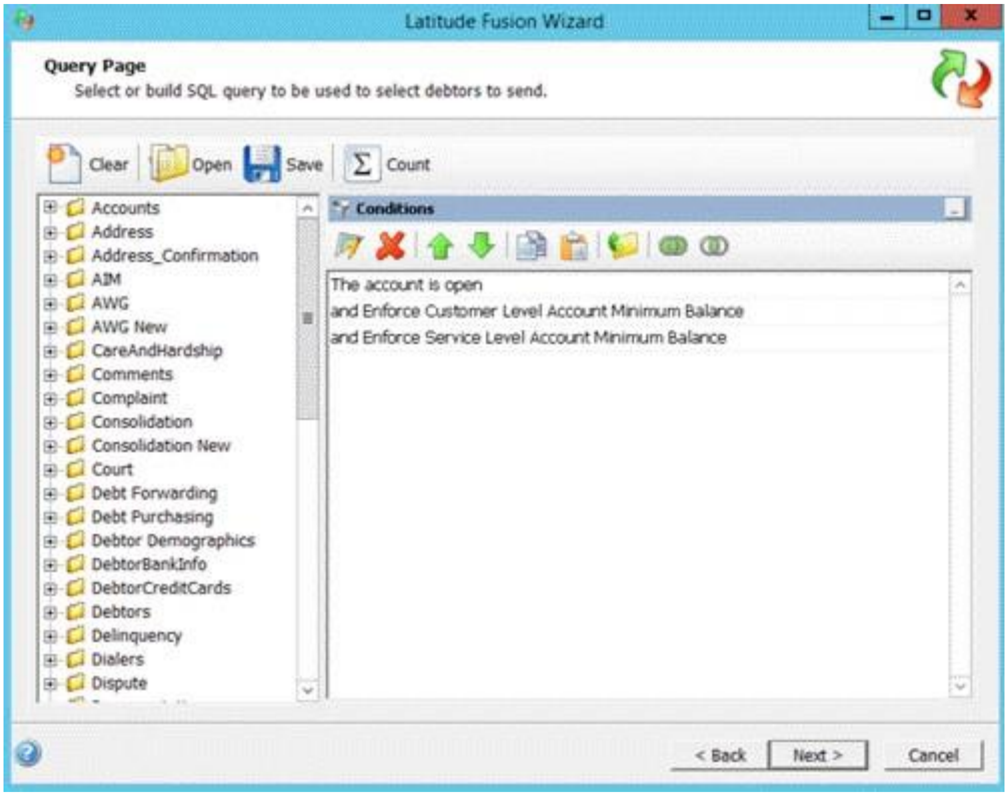
5. Do the following:

    a. Click **Create a request file to send**.

    b. To include co-debtors, select **Include co-debtors**.

    c. To include debtors that had a previous request, select **Allow on previously requested debtors**.

6. Click **Next**. The **Query Page** appears. Fusion includes some conditions by default.



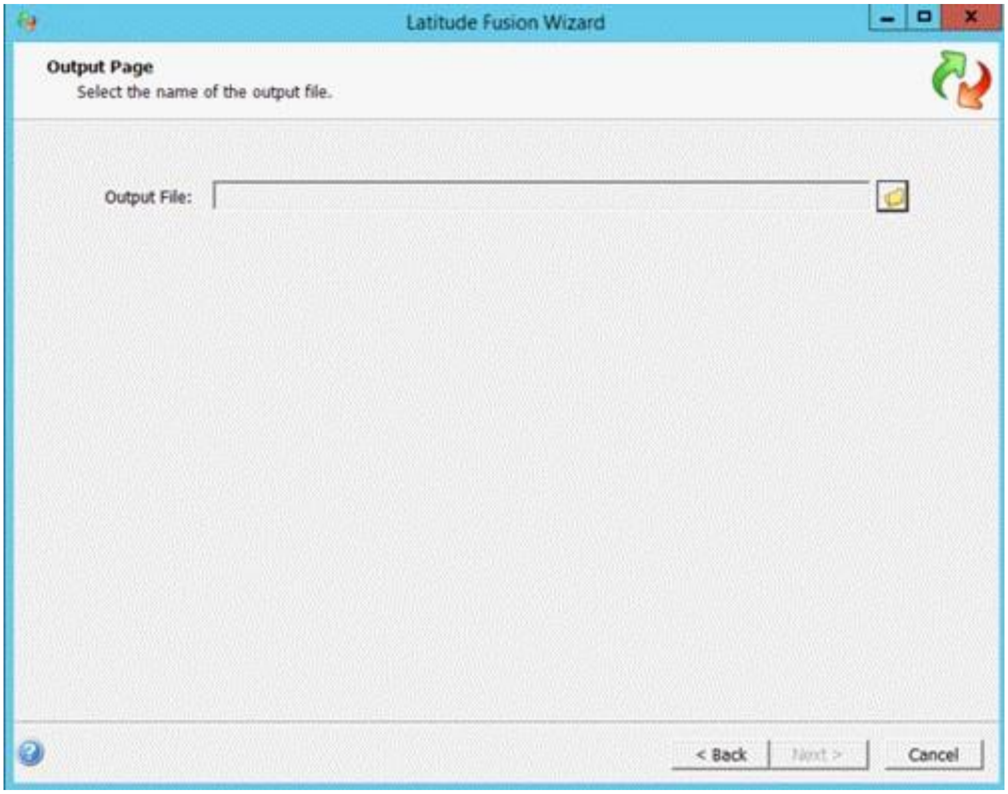
Enforce Service Level Account Minimum Balance: Restricts to accounts where the balance is greater than or equal to the amount specified for the service. For more information, see Maintain Service Properties.

Enforce Customer Level Account Minimum Balance: Restricts accounts to those accounts where the balance is greater than or equal to the amount specified for the customer for this service. For more information, see Maintain Service Settings for a Customer.

7. To select more conditions, expand a folder, click an item, and drag and drop it to the **Conditions** pane. For more information about conditions, see the **Conditions Pane** topic in the *Latitude Console* documentation.

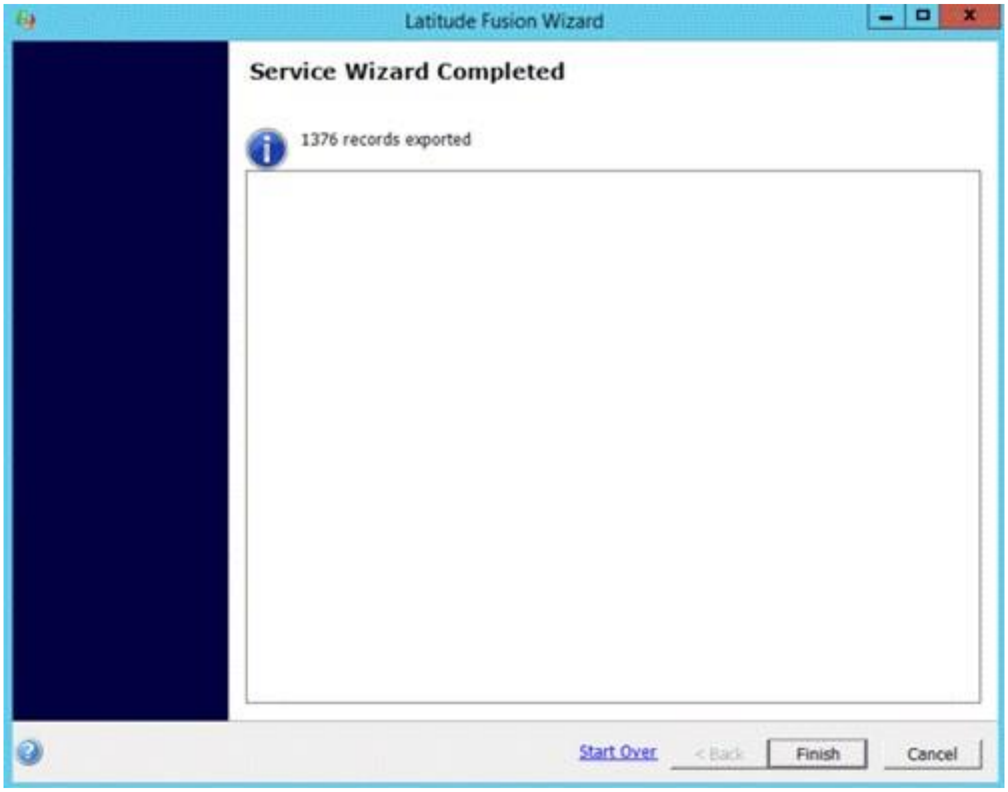
8. To determine how many accounts meet the criteria specified, click **Count**. If no accounts match, verify that you enabled the Service.

9. Click **Next**. The **Output Page** appears.



10. Click the folder icon, specify the name and location of the file to create, and then click **Save**.

11. Click **Next**. Fusion Wizard shows the progress of the file creation. When complete, the **Service Wizard Completed** page appears.



12. Click **Finish**. Transmit the file to your vendor.

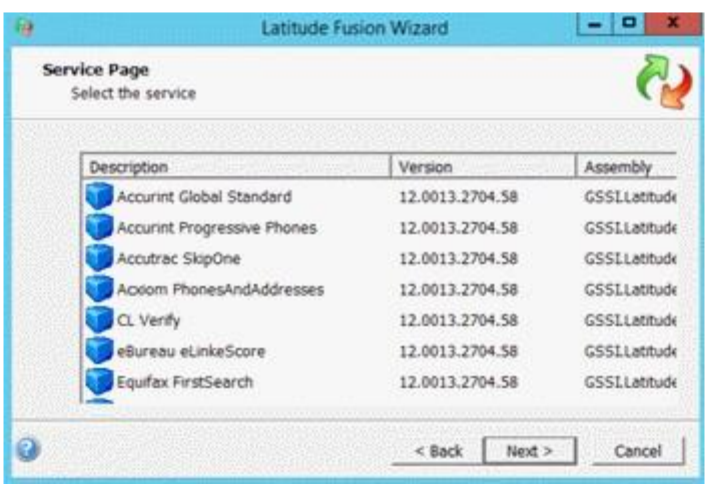
Load a Response File

Use the **Fusion Wizard** to load a response file to Latitude. The file is a response to a request generated in Fusion, sent to the outside vendor, and received back from the vendor.

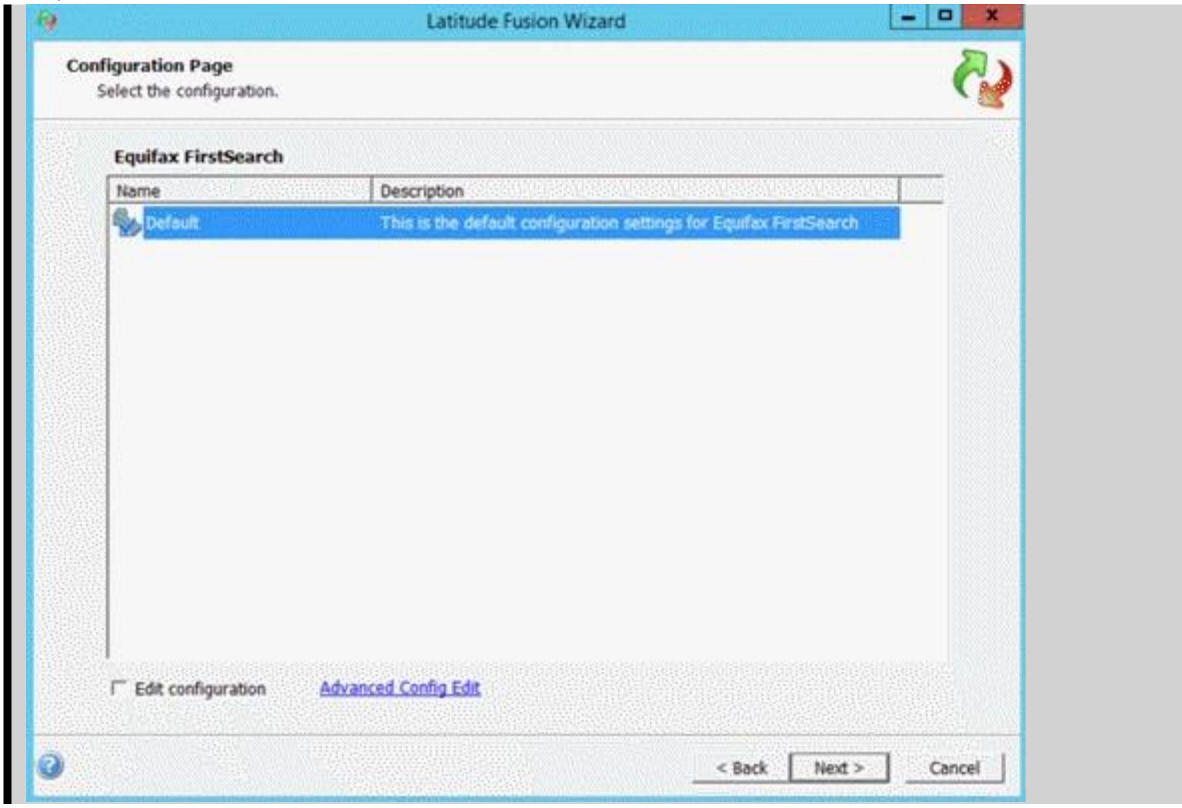
To load a response file

1. In the **Welcome** page, click **Next**. The **Service Page** appears.

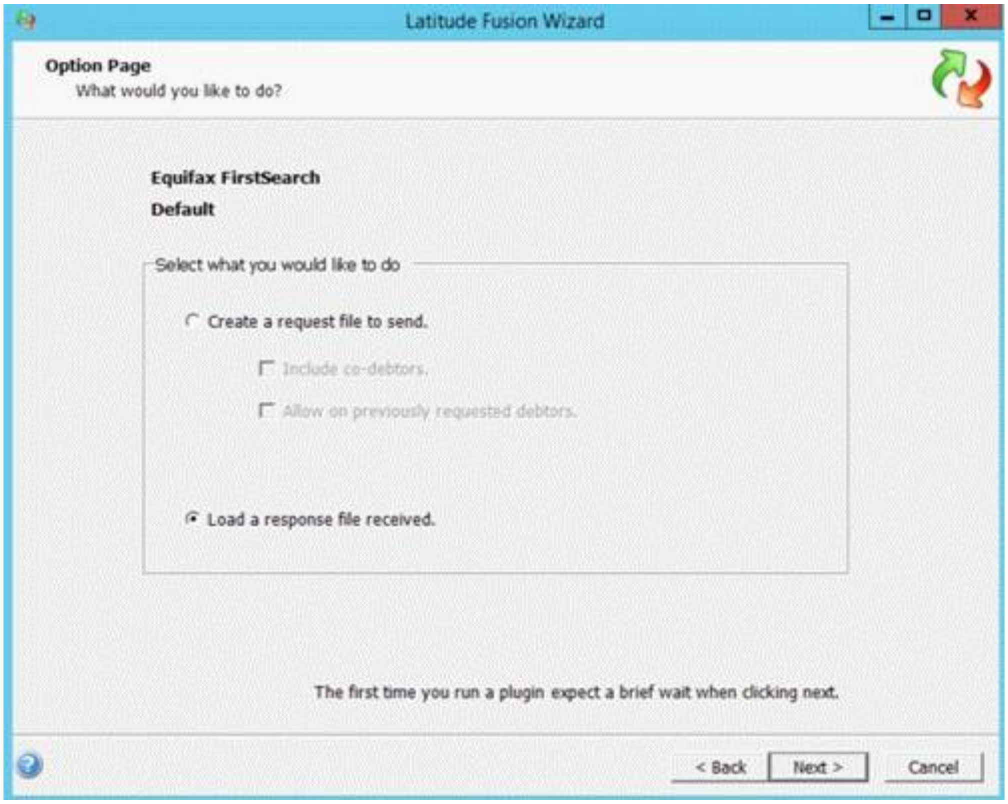
   Note: The following is an example only.



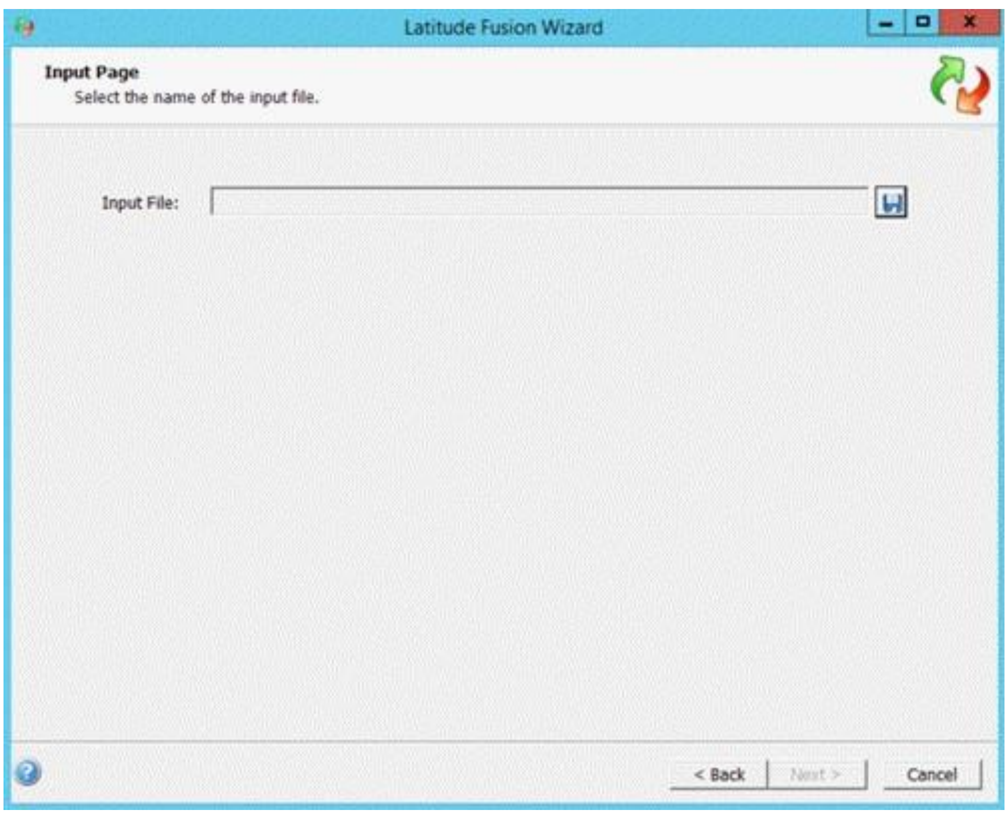
2. Click a service and then click **Next**. The **Configuration Page** appears. Typically, **Default** is the only option available.



3. Click the configuration setting and then click **Next**. The **Option Page** appears.

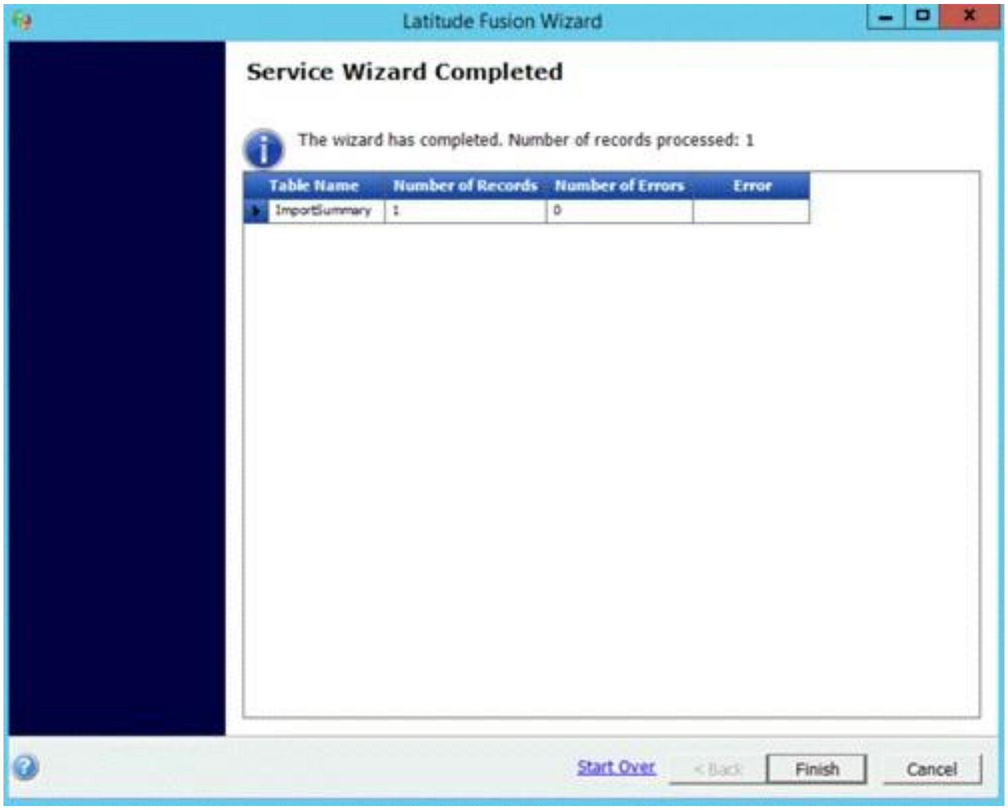


4. Click **Load a response file received** and then click **Next**. The **Input Page** appears.



5. Click the Open icon, specify the name and location of the file to receive, and then click **Open**.

6. Click **Next**. Fusion Wizard shows the progress of the file creation. When complete, the **Service Wizard Completed** page appears.



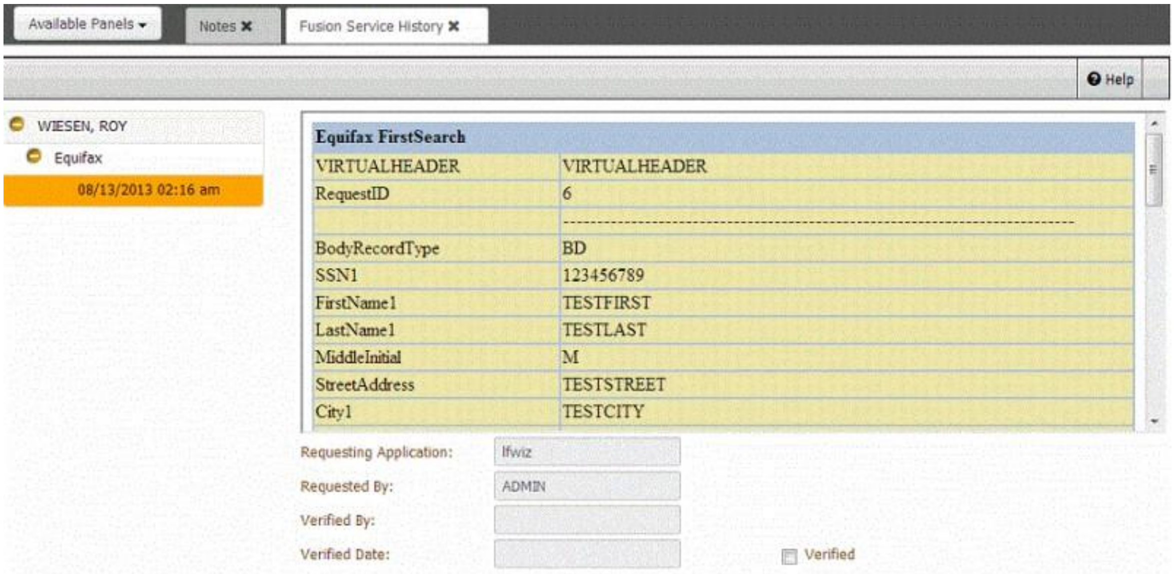
7. Click **Finish**.

View Services Information

Use the **Fusion Service History** panel in Latitude o view vendor service information for an account that Fusion included in a request or return file.

To view services information

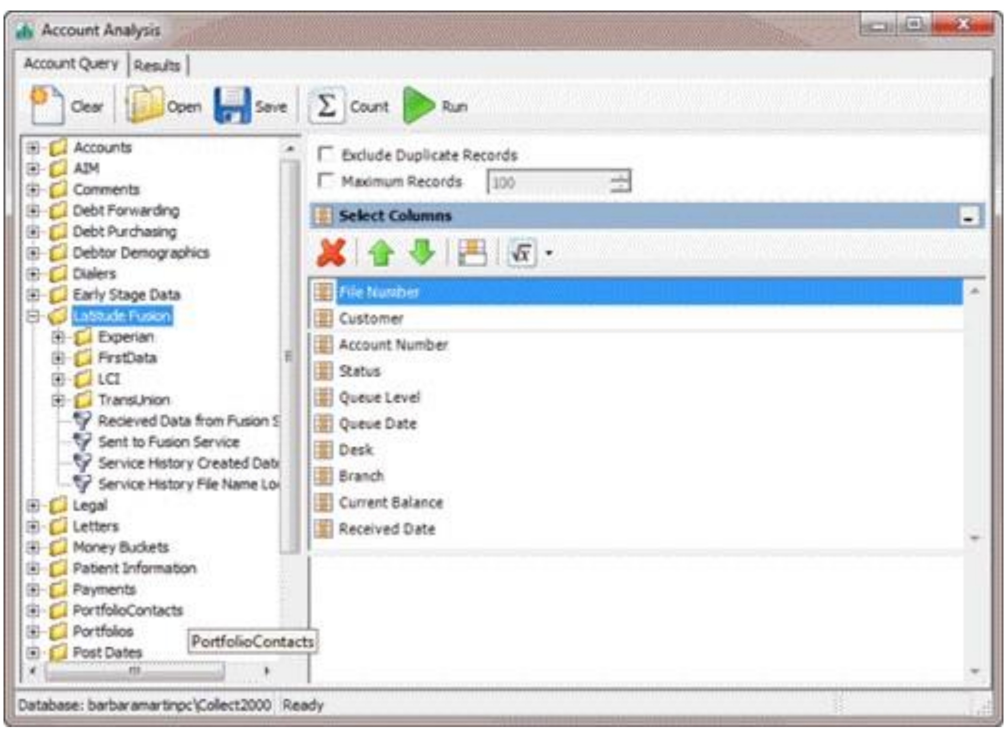
1. Display an account in the **Work Form** in Latitude.
2. In the **Panel** navigation bar, click **Available Panels** and then click **Fusion Service History**.
3. In the navigation tree, expand the name and service provider nodes.
4. Click the date and time entry. The service history appears. If the system received a response from the service provider, it appears in a data grid.



View Information in Account Analysis

Use the **Account Analysis** tool to create a report that includes information that Fusion sent to or received from an outside service. For more information about using the Account Analysis tool, see the *Latitude Console* documentation.

> **Note**: Conditions for data imported from Fusion are in the **Latitude Fusion** folder in the **Account Analysis** window. The system creates specific vendor product conditions the first time you create a request file for the vendor product in **Fusion Wizard**. The product condition names correspond to the product folder names in the vendor folders.



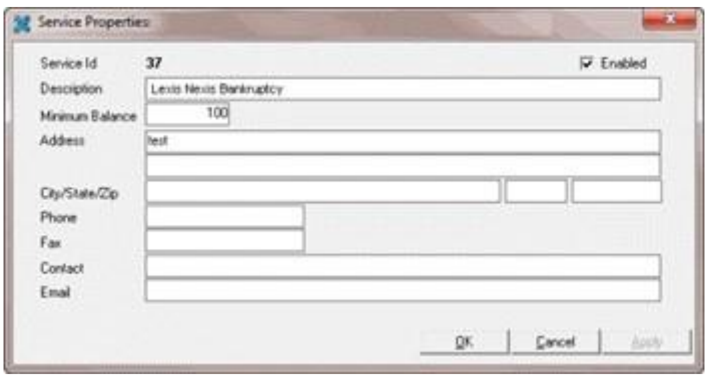
Maintain Service Properties

Use the **Service Properties** dialog box in Latitude Console to enable or disable Fusion services. When you install Fusion, the system creates the available outside services and enables it by default for all existing customers.

Important: To enable or disable a service for a customer, see Service Settings by Customer.

To maintain service properties

1. Log on to Latitude Console.
2. In the **Maintenance** menu, click **System Codes and Settings.**
3. In the **Maintenance** window, click the **Outside Services** folder.
4. In the **Information** pane, double-click a service.
5. In the **Service Properties** dialog box, select the **Enabled** check box.



6. To restrict accounts to include when creating an export or request file, in the **Minimum Balance** box, type a minimum balance. The export or request file only includes accounts that are greater than or equal to the minimum balance.
7. Click **OK**.

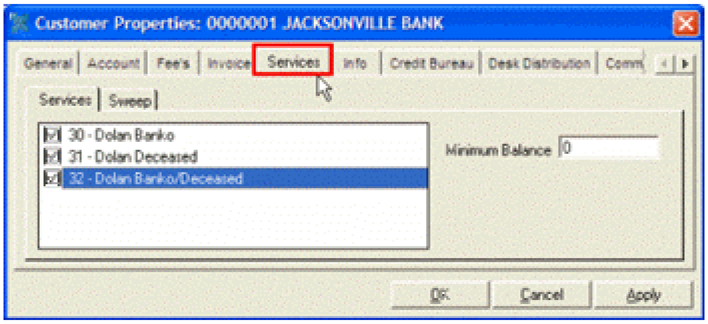
Maintain Service Settings for a Customer

Use the **Customer Properties** dialog box in Latitude Console to maintain service settings for a customer.

To maintain service settings for a customer

1. Log on to Latitude Console.
2. In the **Maintenance** menu, click **System Codes and Settings.**
3. In the **Maintenance** window, click the **Customers** folder.
4. In the **Information** pane, search for the customer and then, in the search results, double-click the customer.
5. In the **Customer Properties** dialog box, click the **Services** tab.

6. To allow vendor services, select the service in the **Services** dialog box.
7. To restrict accounts to include when creating an export or request file, in the **Minimum Balance** box, type a minimum balance. The export or request file only includes accounts that are greater than or equal to the minimum balance.



Default Vendor Mapping

The following table describes the default Exchange settings for vendor imports. To request modifications for these import clients, contact Latitude by Genesys.

Vendor	**Product**	**Import Client**	**Default Import Settings**
Accurint	Global Standard	Maintenance	Services window only
Accurint	Progressive Phones	Maintenance	Services window only
Accutrac	SkipOne	Maintenance	Services window only
Acxiom	PhonesAndAddresses	Maintenance	Services window only
eBureau	eLinkeScore	Maintenance	Services window only
Equifax	FirstSearch	Maintenance	Services window only
Experian	Collection Triggers	Maintenance	Services window only
Experian	Collection Advantage	Maintenance	Services window only
Experian	DPE	Maintenance	Services window only
FirstData	FastBatch	Maintenance	Services window only
GoldLineCreditServices	CheckScrub	Maintenance	Services window only
ID Info	Batch	Maintenance	Services window only
ID Info	Batch 2	Maintenance	Services window only
Innovis	RPC	Maintenance	Services window only
LCI	Bankruptcy	Maintenance	Services window only

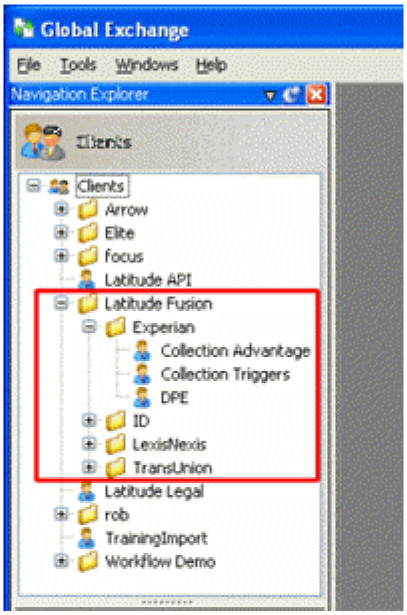
LCI	Deceased	Maintenance	Services window only
LCI	MilitaryScrub	Maintenance	Services window only
LexisNexis	Bankruptcy Deceased (two clients used)	Maintenance stored procedure	Services window; updates bankruptcy or deceased table,
Vendor	**Product**	**Import Client**	**Default Import Settings**
			depending on the file type returned
LexisNexis	Bankruptcy	Maintenance stored procedure	Services window; updates bankruptcy table
LexisNexis	Deceased	Maintenance stored procedure	Services window; updates bankruptcy table
LexisNexis	Batch	Maintenance	Services window only
LexisNexis	CAC	Maintenance	Services window only
LexisNexis	PropertyInfo	Maintenance	Services window only
LexisNexis	SkipTrace	Maintenance	Services window only
LexisNexis	SurePlacement	Maintenance	Services window only
Locators	LocatorsHome	Maintenance	Services window only
TALX	WorkNumber	Maintenance	Services window only
Telewire	TNT	Maintenance	Services window only
TransUnion	ContactLocator	Maintenance	Services window only
TransUnion	ContactLocator51	Maintenance	Services window only
TransUnion	CPE (using TU40 format)	Maintenance	Services window only
TransUnion	OlbAffr	Maintenance	Services window only
TransUnion	TFC	Maintenance	Services window only
Verifacts	SkipTrace	Maintenance	Services window only

Exchange Vendor Processing

Exchange handles processing of information returned from vendors using a standard client. Fusion uses the Exchange client when importing returned information. Job Manager Service can run the Exchange client as a scheduled job.

This section of the documentation provides details for standard Exchange vendor clients currently provided and the default configuration. Your organization can modify this client within Exchange or request changes from Latitude by Genesys.

Vendor interface clients appear in the **Latitude Fusion** folder in the **Clients** tree in Exchange.



Notes:

- Vendor service clients outlined in this document do not always match the clients available for your organization.
- Exchange imports all returned vendor information into the services table. Users can view an account's service information account in the **Work Form**. For more information, see View Services Information.
- The **Latitude Fusion** folder in the **Global Exchange** window contains the Exchange clients configured for Fusion. The **Fusion Wizard** creates the vendor product client when creating the first request file for the vendor product. The vendor folder contains the vendor product clients.

Modify Mapping Information

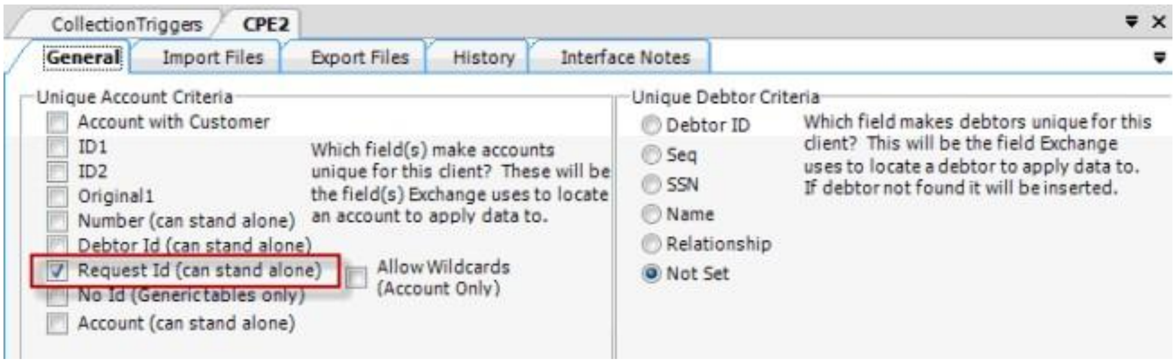
Information returned from vendors has to contain a value that matches the unique identifier sent with the request file and stored in the services table (ServiceHistory.RequestID). The system configures the Exchange client when running the first request file for the vendor product automatically. This section provides basic information on mapping a note for bankruptcy information. More complex mapping requires the purchase of custom services.

Notes:

- This topic does not apply to import clients that use a stored procedure to process information.
- For more information about how to use Exchange for mapping, see the Exchange documentation.

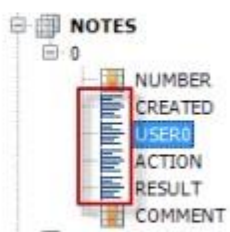
To modify mapping information

1. Log on to Exchange.
2. In the **Unique Account Criteria** section of the **General** tab, verify that **Request Id** is selected.



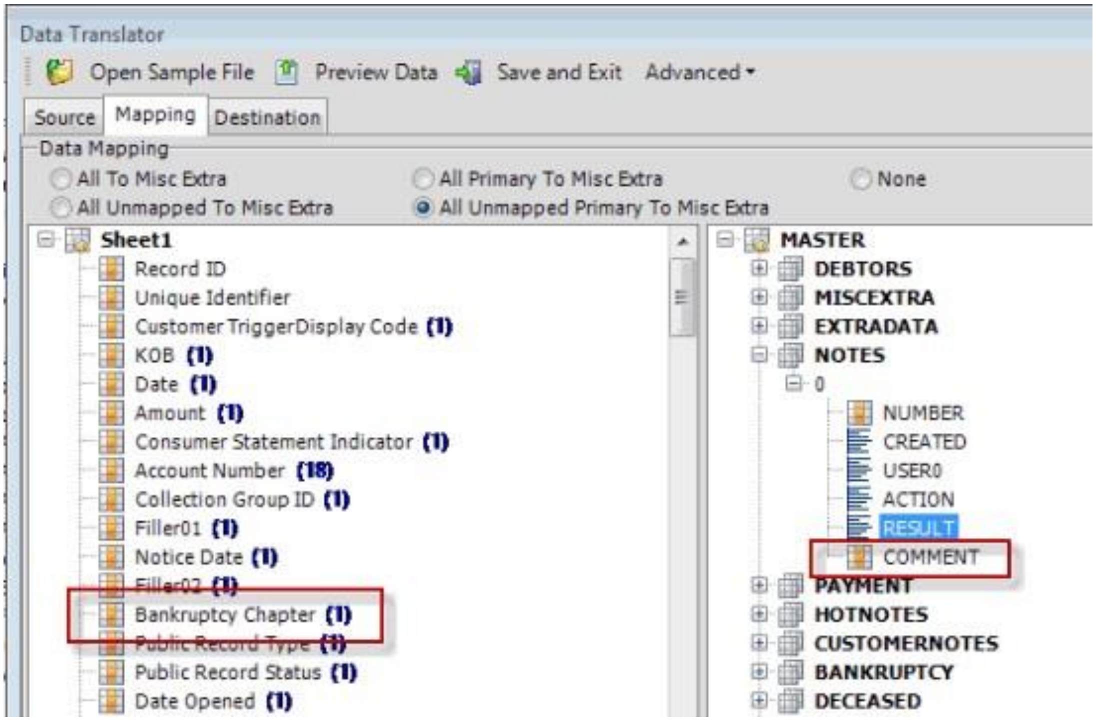
3. Click the **Import Files** tab.
4. Click the **Maintenance** tab and then click **Modify File Mapping**.
5. In the **Data Translator** window, click the **Mapping** tab.
6. On the **Mapping** tab, click the plus signs to open the **Source** and **Destination** nodes.

The following is for adding a note to the account based on the **Bankruptcy** value in the file received from the vendor. The "Mapped" icons indicate that the values for CREATED, USER0, ACTION and RESULT are set already.

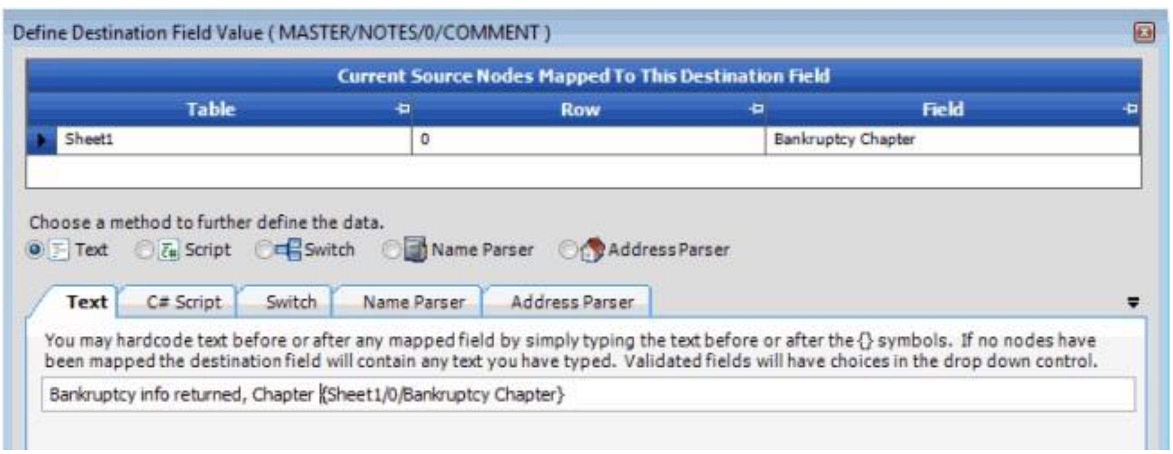


7. Drag the 'Bankruptcy Chapter' node from the **Source** pane to the 'COMMENT' node in the **Destination** pane and drop it.

> **Note:** Contact your vendor for specific information about returned values and their interpretation.



8. In the **Destination** pane, double-click **COMMENT** to modify the comment. The field mapping appears in the **Text** box. Click to the front of the mapping and type "Bankruptcy info returned, Chapter ". This information adds meaning to the comment when it is displayed in the **Work Form**, rather than just displaying the returned value (for example, "7", "11" or "13".).



9. In the **Define Destination Field Value** window, click **OK**.