[°]GENESYS[™]

Fusion Printable Help

Version 2024 R1

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Abstract

This document is a printable version of Fusion help.

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Table of Contents

Introduction to Fusion	2
Create a Request File	2
Load a Response File	9
View Services Information	12
View Information in Account Analysis	13
Maintain Service Properties	14
Maintain Service Settings for a Customer	14
Default Vendor Mapping	15
Exchange Vendor Processing	17
Modify Mapping Information	17

ii

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.

 rvice Page Select the service		G
Description	Version	Assembly
Accurint Global Standard	12.0013.2704.58	GSSLLatitude
Accurint Progressive Phones	12.0013.2704.58	GSSLLatitude
Accutrac SkipOne	12.0013.2704.58	GSSLLatitude
Acxiom PhonesAndAddresses	12.0013.2704.58	GSSLLatitude
CL. Verify	12.0013.2704.58	GSSLLatitude
eBureau eLinkeScore	12.0013.2704.58	GSSLLatitude
Equifax FirstSearch	12.0013,2704.58	GSSILatitude

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

Description This is the default configuration settings for Equifax FirstSearch	Name
This is the default configuration settings for Fourfax ErstSearch	
	Sefault

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.

UPO DESSO DE SUCRE	required to execute Experian True Trace.	
Profile ID:		
NCOA Option: N	1	•
	A	
COA Option: Y	1	
Phone Option:	1 = Cell Phone Only	•
hone Types:	Search:	• • • • •
	Code Description	
	O I Home	
		~
hone Statuses:	Search	·
	Code Description	
	O Unknown	
	Bad	
	🖸 🥥 2 Good	

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.

6	Latitude Fusion Wizard	x
	a Page nat would you like to do?	A 1
	Equifax FirstSearch Default	
	Select what you would like to do	
	Create a request file to send.	
	T Include co-debtors.	
	Allow on previously requested debtors.	
	C Load a response file received.	
	The first time you run a plugin expect a brief wait when clicking next.	
0	< Back Next >	Cancel

- 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.

Query Page Select or build SQL query t	be used to select debtors to send.	6
Clear Open	Conditions	-
AIM AIM AWG AWG New CareAndHardship Complaint Complaint Consolidation Consolidation Consolidation New Debt Forwarding Debtor Demographics Debtor Demographics DebtorCreditCards DebtorS Debtors Debtors Debtors Debtors Debtors Debtors Debtors	The account is open and Enforce Customer Level Account Minimum Balance and Enforce Service Level Account Minimum Balance	

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 <u>Maintain</u> <u>Service Properties</u>.

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 <u>Maintain Service Settings for a Customer</u>.

- 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.

9	Latitude Fusion Wizard	×
Output Page Select the name of the output file	2	e
Output File:		6
0		< Back Nort > Cancel

- 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.

9	Latitude Fusion Wizard
	Service Wizard Completed
	1376 records exported
0	Start Over Back Finish Cancel

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.

Se	rvice Page Select the service		G
	Description	Version	Assembly
	Accurint Global Standard	12.0013.2704.58	GSSLLatitude
	Accurint Progressive Phones	12.0013.2704.58	GSSLLatitude
	Accutrac SkipOne	12.0013.2704.58	GSSLLatitude
	Acxiom PhonesAndAddresses	12.0013.2704.58	GSSLLatitude
	CL. Verify	12.0013.2704.58	GSSLLatitude
	eBureau eLinkeScore	12.0013.2704.58	GSSLLatitude
	Equifax FirstSearch	12.0013,2704.58	GSSI.Latitude
2		< Back Next >	Cancel

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

Equifax FirstSearch	Description	-
Default	This is the default configuration settings for Equifax FirstSearch	-

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

9	Latitude Fusion Wizard	- 0 X
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	n Page hat would you like to do?	?
	Equifax FirstSearch Default	
	Select what you would like to do	
	C Create a request file to send.	
	T Include co-debtors.	
	Allow on previously requested debtors.	
	Load a response file received.	
	The first time you run a plugin expect a brief wait when clicking next.	
0	< Back Next >	Cancel

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

9	Latitude Fusion Wizard	X
Input Page Select the name of the input f	We.	<u>(</u>)
Input File:		H
0	< Bac	k Next > Cancel

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.

9		Latitude Fusion \	Wizard		×
	Service Wiza	rd Complete	d		
	•	as completed. Num Number of Records	192		
	Importiummary 1		0	s Error	
0	1		Start Over	< Back Finish	Cancel
			ANTI VISI	Pinish	Cancer

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.

WIESEN, ROY • Equifax 08/13/2013 02:16 am • RequestID • BodyRecordType • BodyRecordType • BodyRecordType • BodyRecordType • BodyRecordType • BodyRecordType • SSN1 • I23456789 • FirstName1 • IESTFIRST • LastName1 • StreetAddress • TESTSTREET • City1 • Requesting Application: • MONIN						🛛 Help
Image: Provide and Prov	WIESEN, ROY	Equifax FirstSearch		e and the particular in the		
BodyRecordType BD SSN1 123456789 FirstName1 TESTFIRST LastName1 TESTLAST MiddleInitial M StreetAddress TESTSTREET City1 TESTCITY	C Equifax	the second se		VIRTUALHEAD	ER	
SSN1 123456789 FirstName1 TESTFIRST LastName1 TESTLAST MiddleInitial M StreetAddress TESTSTREET City1 TESTCITY	08/13/2013 02:16 am	RequestID		6		
SSN1 123456789 FirstName1 TESTFIRST LastName1 TESTLAST MiddleInitial M StreetAddress TESTSTREET City1 TESTCITY						
FirstName1 TESTFIRST LastName1 TESTLAST MiddleInitial M StreetAddress TESTSTREET City1 TESTCITY		and the second second second second second second				
LastName1 TESTLAST MiddleInitial M StreetAddress TESTSTREET City1 TESTCITY						
MiddleInitial M StreetAddress TESTSTREET City1 TESTCITY		FirstName1		TESTFIRST		
StreetAddress TESTSTREET City1 TESTCITY Requesting Application: Ifwiz		LastName1		TESTLAST		
City1 TESTCITY Requesting Application: Ifwiz		MiddleInitial		М		
Requesting Application: Ifwiz		StreetAddress		TESTSTREET		
		Cityl		TESTCITY		
Requested By: ADMIN		Requesting Application:	Ifwiz			
		Requested By:	ADMIN			
Verified By:		Verified Ry:	1. A.L.	The second second of		
		Verified Date:			Verified	

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.

Account Analysis	
Account Query Results	
Clear Den 🚽 Save	D Count Run
Accounts Accounts Accounts ADM Comments	Exclude Duplicate Records Maximum Records
E Debt Forwarding	E Select Columns
Construction Construction Construction Construction Construction Construction	😹 🚖 🕹 🖪 🐷 ·
🗄 💭 Early Stage Data	🖀 file humber
B- Catalog Fusion	(III) Customer
E Experian	Account Number
	I Status
E- 💋 TransUnion	T Queue Level
- Recieved Data from Fusion S	III Queue Date
Sent to Fusion Service	I Desk
Service History File Name Lo	Eranch
🕀 🚺 Legal	Current Balance
E Letters	Received Date
G Money Buckets Patient Information	
Payments	
PortfoloContacts	
Portfolio PortfolioContac	+
Post Dates	
	1

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 <u>Service Settings by Customer</u>.

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.

Service Id	37	Enabled
Description	Lexis Nexis Bankruptcy	
Animum Balance	100	
4ddess	test	
City/State/Zip		
hone		
ax		
Contact		
Email		

- 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.

reral Account Fee's Invoice Services into C	redit Bureau Desk Distribution Comm
1211 30 - Dolan Banko 1211 31 - Dolan Deceased 1211 32 - Dolan Banko/Deceased	Minimum Balance 0

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.

Product	Import Client	Default Import Settings
Global Standard	Maintenance	Services window only
Progressive Phones	Maintenance	Services window only
SkipOne	Maintenance	Services window only
PhonesAndAddresses	Maintenance	Services window only
eLinkeScore	Maintenance	Services window only
FirstSearch	Maintenance	Services window only
Collection Triggers	Maintenance	Services window only
Collection Advantage	Maintenance	Services window only
DPE	Maintenance	Services window only
FastBatch	Maintenance	Services window only
CheckScrub	Maintenance	Services window only
Batch	Maintenance	Services window only
Batch 2	Maintenance	Services window only
RPC	Maintenance	Services window only
Bankruptcy	Maintenance	Services window only
	Global Standard Progressive Phones SkipOne PhonesAndAddresses eLinkeScore FirstSearch Collection Triggers Collection Advantage DPE FastBatch CheckScrub Batch Batch 2 RPC	Global StandardMaintenanceProgressive PhonesMaintenanceSkipOneMaintenancePhonesAndAddressesMaintenanceeLinkeScoreMaintenanceFirstSearchMaintenanceCollection TriggersMaintenanceDPEMaintenanceFastBatchMaintenanceCheckScrubMaintenanceBatchMaintenanceRPCMaintenance

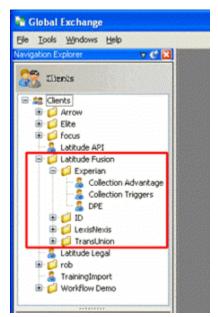
LCI	Deceased	Maintenance	Services window only
LCI	MilitaryScrub	Maintenance	Services window only
LexisNexis	Bankruptcy Deceased (two clients used)	Maintenance stored procedure	Services window; updates bankruptcy or deceased table,
Vendor	Product	Import Client	Default Import Settings
			depending on the 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 <u>View</u>
 <u>Services Information</u>.
- 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

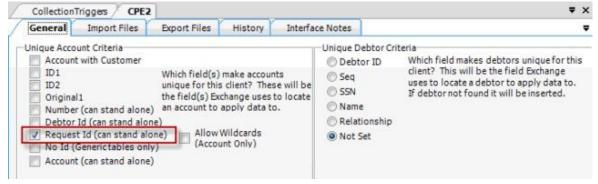
Information returned from vendors has to contain a value that matches the unique identifier sent with the request file and stored in the services table (ServiceHistory.RequestID). The system configures the Exchange client when running the first request file for the vendor product automatically. This 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.

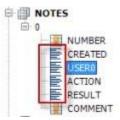
To modify mapping information

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



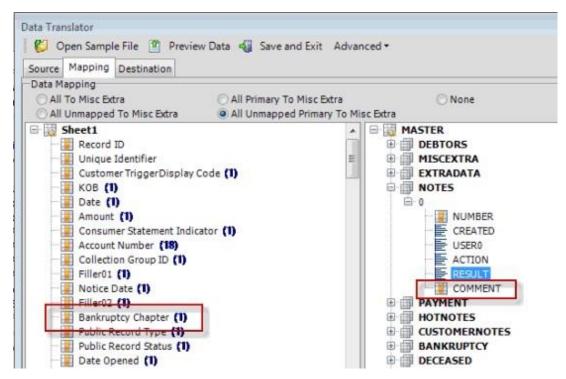
- 3. Click the **Import Files** tab.
- 4. Click the Maintenance tab and then click Modify File Mapping.
- 5. In the **Data Translator** window, click the **Mapping** tab.
- 6. On the **Mapping** tab, click the plus signs to open the **Source** and **Destination** nodes.

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, USERO, 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".).

	Table		Nodes Mapped To This D Row	-3	Field	
Sheet1	Table	0	ROW		cy Chapter	
All a second second second						
	od to further define t		e Parser 🛛 🔿 Address Pa	arser		
Text 🤇		witch 🔿 🔂 Nam		arser		

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