



AIM Receiver Manager

Printable Help

Version 2024 R2

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Abstract

This document is a printable version of AIM Receiver Manager help.

For copyright and trademark information, see

https://help.genesys.com/latitude/Liquid/Desktop/Copyright_and_Trademark_Information.htm.

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Introduction to AIM Receiver Manager

AIM Receiver Manager allows you to transfer information between AIM (Agency/Attorney Interface Manager) clients and outside collection agencies and attorneys. It exports and imports data using XML file layouts that are proprietary to AIM.

Related Topics

[What's New In AIM Receiver Manager](#)

[Log on to AIM Receiver Manager](#)

[Overview of AIM Receiver Manager Window](#)

[Help Overview](#)


[Feedback](#)

What's New in AIM Receiver Manager

The following Service Updates (SU) introduced changes and enhancements in AIM Receiver Manager 13.0.

2024 R1

- **New File Type CDOC in AIM Receiver**

A new file type CDOC which can be exported using AIM and imported using AIM Receiver.

This file will include information related to the documents attached to an account.

A new record type CDOC is also created in the existing CPLC file

- **New configuration options AIM Receiver**

New configuration options related to CDOC file in AIM and AIM Receiver.

This configuration will allow users to select the document types which should be included in the CDOC file

- **AIM Receiver Config Changes for Dispute and Complaint Codes**

Added new configuration in AIM and AIM Receiver to map Complaint and Dispute Codes of clients and agencies

which will then be used in the import and export files (CCPT/ACPT and CDIS/ADIS)

2020 R1

Phone consent

- Added phone consent data to the Demographics (CDEM) import file. For more information, see [Import Demographic Data](#).
- Added phone consent data to the Demographics (ADEM) export file. For more information, see [Export Demographic Data](#).

Related Topics

[Introduction to AIM Receiver Manager](#)

[Log on to AIM Receiver Manager](#)

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[Overview of AIM Receiver Manager Window](#)

[Help Overview](#)



Log on to AIM Receiver Manager

Use the **Latitude Logon** dialog box to log on to AIM Receiver Manager.

To log on to AIM Receiver Manager

1. Do one of the following:
 - On your desktop, click the shortcut to AIM Receiver Manager.
 - Click **Start > All Programs > Interactive Intelligence > Interaction Collector > Agency Interface Manager > AIM Receiver**.

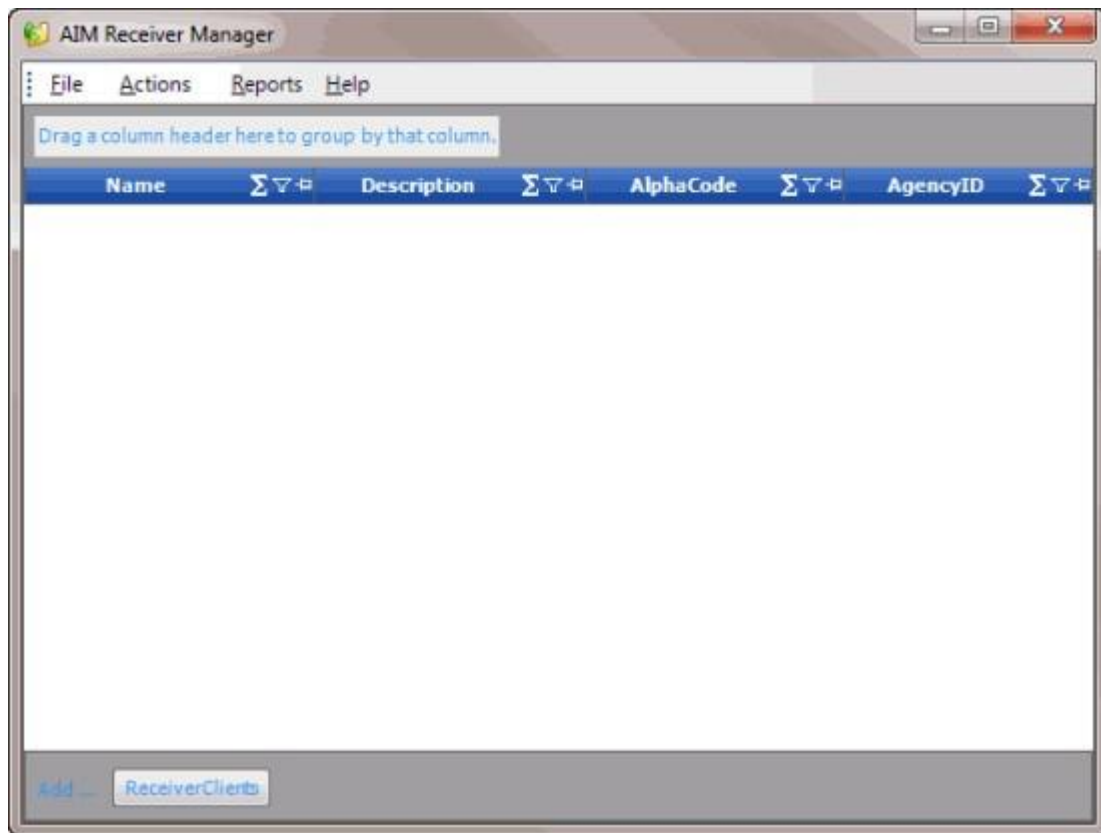
The **Latitude Logon** dialog box appears.



Note: Premises-based clients can use Windows authentication to bind Latitude users to their Windows identity to permit logging on to Latitude automatically. Windows authentication is not available for hosted clients. To log on using Windows authentication, select the **Log in using Windows authentication** check box and provide your Windows user name and password.

2. In the **User Name** box, type your Latitude user name.
3. In the **Password** box, type your Latitude password. As you type your password, periods display instead of the typed characters.
4. Click **Okay**. The **AIM Receiver Manager** window appears.

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Related Topics

[Introduction to AIM Receiver Manager](#)

[What's New in AIM Receiver Manager](#)

[Overview of AIM Receiver Manager Window](#)

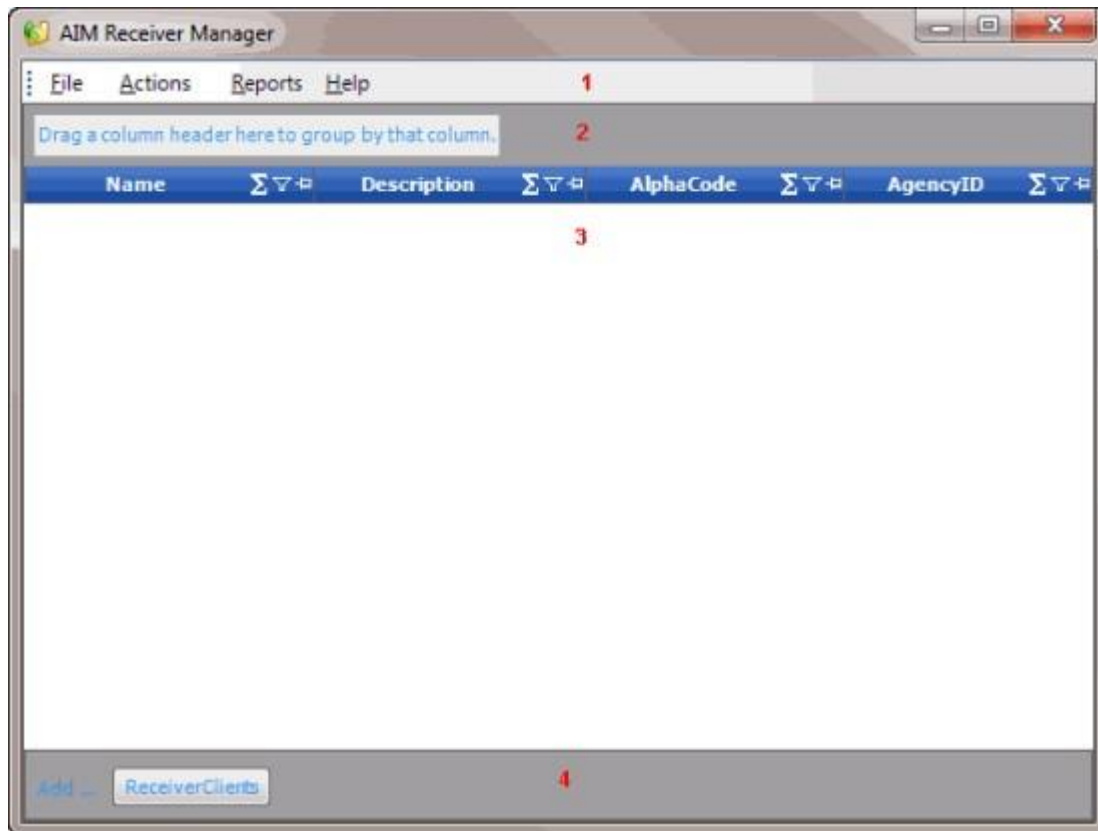
[Help Overview](#)

Overview of AIM Receiver Manager Window



[Feedback](#)

The **AIM Receiver Manager** window is the main window in AIM Receiver Manager. It allows you to specify settings for an outside collection agency or attorney, import data received from the customer, and export data to the customer.



1. **Menu bar:** Displays options for the application.
2. **Grouping bar:** Allows you to drag and drop column headings into the space to group data.
3. **Content pane:** Displays the AIM Receiver clients.
4. **Command bar:** Displays options for adding or displaying information.

Related Topics

[Introduction to AIM Receiver Manager](#)

[What's New In AIM Receiver Manager](#)

[Log on to AIM Receiver Manager](#)

[Help Overview](#)

Help Overview

AIM Receiver Manager help provides you with information for using AIM Receiver Manager. To locate and view a topic, use the table of contents, index, and search features.

To open help

In menu bar, click **Help** and then click **Help on AIM Receiver Manager**. The **AIM Receiver Manager Help** window appears.



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 hide or show the tabs and **Navigation** pane, move forward and backward through topics, and print the currently displayed topic.

2. **Tabs:** 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:** If available, displays a list of terms and their 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 to send feedback through an email message to Latitude by Genesys Documentation.
 5. **Content pane:** Displays the contents of a topic. To view the **Content** pane menu, right-click in the **Content** pane.

Search feature

You can use the search feature to search for 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	32?57	Returns all topics with text that has any character where you placed a question mark (for example, 32?57 returns 32257, 32457, and 32857).
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AIM Receiver Manager Printable Help

character that can be anything, and ends in the specified characters		
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.

Related Topics

[Introduction to AIM Receiver Manager](#)

[What's New In AIM Receiver Manager](#)

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Help Overview

[Log on to AIM Receiver Manager](#)

[Overview of AIM Receiver Manager Window](#)

Client Configuration



[Feedback](#)

Client Configuration

Use the **Client Configuration** window to add clients who outsource accounts to your organization, and configure the client settings. You can also import and export data for a single client. For more information, see [Import Files](#) and [Export Files](#).

Related Topics

[Add a Client](#)

[Configure General Client Settings](#)

[Configure Account Placements](#)

[Configure Pending Recalls](#)

[Configure Final Recalls](#)

[Configure Close Status Codes](#)

[View Client History](#)

[Configure Statuses and Notes](#)

[Configure Payments](#)

[Configure Requests and Responses](#)

[Configure Letter Work Efforts](#)

[Configure Note Work Efforts](#)



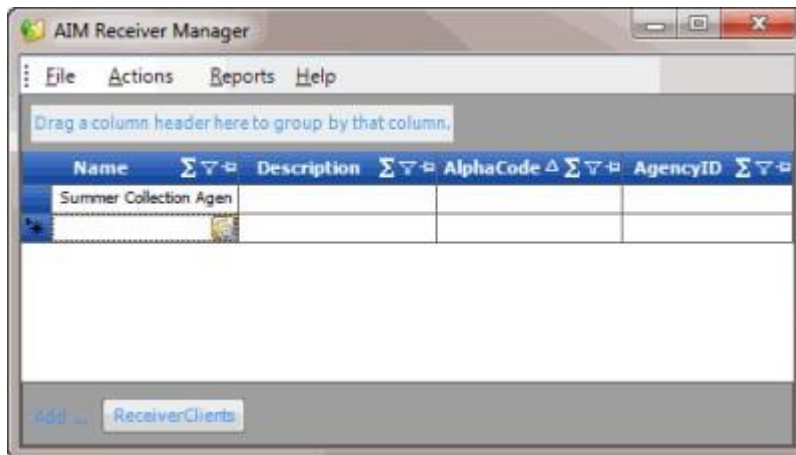
[Feedback](#)

Add a Client

Use the **Client Configuration** window to add a client. Once you add a client, you can configure the client's settings.

To add a client

1. In the lower section of the **AIM Receiver Manager** window, click **ReceiverClients**. AIM Receiver Manager adds a blank row to the data grid.



2. In the Name column of the data grid, click the Client icon. The **Client Configuration** window appears.

Client Name: Name of the client who is outsourcing accounts to your organization.

My Agency ID: Unique numeric code that the client assigned to your organization for identification purposes.

AIM Client Version: The version of AIM that your client uses.

Using Alpha Code in File Names: If selected, AIM Receiver Manager includes the value in **My Alpha Code** when naming the import and export files.

My Alpha Code: Unique alphanumeric code that the client assigned to your organization. The client uses this code to label the folders that contain your import and export files.

3. In the upper section of the window, complete the information and then click **Apply**.
4. Proceed to configure the client.
5. After you configure the client, click **Save**. AIM Receiver Manager adds the client to the data grid in the **AIM Receiver Manager** window.

Related Topics

[Client Configuration](#)



Configure General Client Settings

Use the **General** tab in the **Client Configuration** window to configure general settings for a client.

To configure general client settings

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

 The screenshot shows a software window titled "Client Configuration" with the "General" tab selected. The window is divided into several sections. At the top, there are three tabs: "History", "Status and Notes (ASTS)", and "Payments". Below these, there are three sub-tabs: "Final Recall", "Close Statuses", and "Process". The main area of the window is divided into two columns. The left column contains a list of fields: Description, Contact Name, Phone, Email, Address, Last Received, Placement, Pending Recall, Final Recall, Payment, Demographic, Notes, Misc Extra Data, Equipment, Request/Response, Judgment, Deceased, Bankruptcy, Complaint, and Dispute. Each field has a corresponding input box or dropdown menu. The right column contains a list of fields: Last Sent, Recall Objection, Payment, Demographic, Close, Bankruptcy, Deceased, Reconciliation, Request/Response, Acknowledgment, Asset, Judgment, Status/Notes, Activity Notes, and Work Efforts. Each field has a corresponding input box or dropdown menu.

Description: Description of the client.

Contact Name: Name of the contact person at the client's organization.

Phone: Contact person's phone number.

Email: Contact person's email address.

Address: Contact person's mailing address.

Last Received: This section displays the dates that you last received the type of data from the client. The system populates this information when you import data from a file.

Last Sent: This section displays the dates that you last sent the type of data to the client. The system populates this information when you export data to a file.

2. In the upper section of the tab, complete the information and then click **Apply**.

Related Topics

[Client Configuration](#)



Configure Account Placements

Use the **Placement** tab in the **Client Configuration** window to configure account placement settings for a client. You can specify which customer and desk to assign to accounts that a client places with your organization.

To configure account placement settings

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
2. Click the **Placement** tab.

Choose the customer and desk to import accounts into when a placement file is received.

☒ From Placement File
☐ Use Predefined Customer
☐ Customer Mapping Logic

Client Customer	Agency Customer
Add ... New Customer Mapping	

☐ Use Desk from Placement File
 Desk:

Use Desk from Placement File: If selected, the import file contains the desk to assign to accounts.

Desk: Desk to assign to accounts.

3. Do one of the following:

- If the import file contains the customer to assign to accounts, click **From Placement File**.
- To specify the customer to assign to accounts, click **Use Predefined Customer** and then, in the list box, click the customer.
- If the import file contains customer codes that you can map to existing customers, click **Customer Mapping Logic** and then do the following:
 - a. Click **New Customer Mapping**. AIM Receiver Manager adds a blank row to the data grid.
 - b. In the Client Customer column of the data grid, type the code included in the file that identifies the client.
 - c. In the Agency Customer column of the data grid, type the code for the existing customer to map to the client customer code.

4. Do one of the following:

- If the import file contains the desk to assign to accounts, click **Use Desk from Placement File**.
- If the import file doesn't contain the desk to assign to accounts, in the **Desk** list box, click the desk to assign to accounts.

- Complete the information and then click **Apply**.

Related Topics

[Client Configuration](#)



Configure Pending Recalls

Use the **Pending Recall** tab in the **Client Configuration** window to configure pending recalls and objections for a client.

To configure pending recalls

- In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
- Click the **Pending Recall** tab.

The screenshot shows the "Client Configuration" window with the "Pending Recall" tab selected. The window has a title bar with "History", "Status and Notes (ASTS)", and "Payments". Below the title bar are tabs for "Final Recall", "Close Statuses", "Placement", and "Pending Recall". The "Pending Recall" tab is active, showing a form with the following sections:

- If an account is not being objected to change account status to...**: A dropdown menu.
- Configure the following conditions that will trigger a recall objection to be sent when a pending recall is received.**:
 - ☐ When there are promises to pay.
 - ☐ When there are post dated checks.
 - Received a payment with this number of days:
- When the account is one in one of the following statuses.**: A list of statuses with checkboxes:
 - ☐ ACT - ACTIVE ACCOUNT **
 - ☐ AEX - ALL EFFORTS EXHAUSTED
 - ☐ ATY - ATTORNEY REPRESENTED ON ACCT
 - ☐ B07 - CHAPTER 7 BANKRUPTCY **
 - ☐ B11 - CHAPTER 11 BANKRUPTCY
 - ☐ B13 - CHAPTER 13 BANKRUPTCY **
 - ☐ BKY - BANKRUPTCY PENDING **
 - ☐ CCC - CONSUMER CREDIT COUNSELING
 - ☐ CCR - CLOSED CLIENT REQUEST
 - ☐ CND - CEASE AND DESIST
 - ☐ DEC - DEBTOR IS DECEASED
 - ☐ DIP - DEBTOR IN PRISON
 - ☐ DSP - DEBTOR DISPUTES BALANCE
 - ☐ DUP - DUPLICATE ACCT IN SYSTEM
 - ☐ HLD - CLIENT PUT ON HOLD
 - ☐ HOT - SPECIAL INTEREST **
 - ☐ NEW - NEW STATUS **
 - ☐ NPC - NSF STILL HAS PDCS ON FILE **
- When the account is one in one of the following queues.**: A list of queues with checkboxes:
 - ☐ 000 - REMINDER
 - ☐ 010 - BROKEN PROMISE
 - ☐ 011 - NO MORE POSTDATED CHECKS
 - ☐ 012 - BOUNCED CHECKS
 - ☐ 013 - NO MORE PROMISES
 - ☐ 015 - NEW ACCOUNTS
 - ☐ 016 - NEWBIZ FOLLOWUP
 - ☐ 018 - PDC OVER \$500
 - ☐ 019 - NPC
 - ☐ 020 - ACCOUNTS 0-30 DAYS OLD
 - ☐ 025 - ACCOUNTS w/ PAYMENT
 - ☐ 030 - ACCOUNTS 30-60 DAYS OLD
 - ☐ 060 - ACCOUNTS > 60-90 DAYS
 - ☐ 090 - ACCOUNTS 90-120 DAYS OLD
 - ☐ 100 - ACCOUNT REASSIGNED
 - ☐ 120 - OVER 120 DAYS OLD
 - ☐ 200 - RETURNED WITH CREDIT REPORT
 - ☐ 400 - LATE NIGHT (1)

[Account Status]: Status to change an account to when you aren't objecting to an account recall.

When there are promises to pay: If selected, when AIM Receiver Manager receives a pending recall request for an account with a promise-to-pay arrangement, it triggers a recall objection.

When there are post dated checks: If selected, AIM Receiver Manager receives a pending recall request for an account with post-dated check or credit card transactions, it triggers a recall objection.

Received a payment with this number of days: Number of days after AIM Receiver Manager receives a payment that it no longer triggers a recall objection. If AIM Receiver Manager receives a payment before the number of days have passed, it triggers a recall objection.

When the account is in one of the following statuses: If a check box is selected, that account status triggers a recall objection.

When the account is in one of the following queues: If a check box is selected, that work queue triggers a recall objection.

3. Complete the information and then click **Apply**.

Related Topics

[Client Configuration](#)

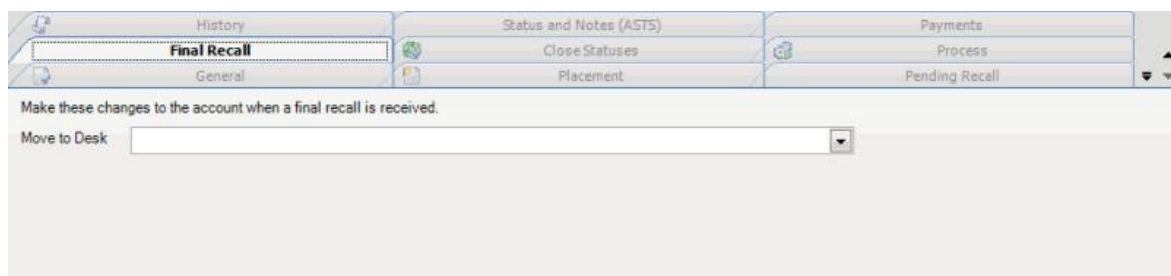


Configure Final Recalls

Use the **Final Recall** tab in the **Client Configuration** window to configure final recalls for a client.

To configure final recalls

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
2. Click the **Final Recall** tab.



3. In the **Move to Desk** list box, click the desk to move accounts to when AIM Receiver Manager receives a final recall and then click **Apply**.

Related Topics

[Client Configuration](#)



Configure Close Status Codes

Use the **Close Statuses** tab in the **Client Configuration** window to map close status codes your organization uses to close status codes the client uses. **To configure close status codes**

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
2. Click the **Close Statuses** tab.

Update the Client Status column to reflect the appropriate statuses for the client

AgencyStatus	ClientStatus	HoldDays
ACT	ACT	
AEX	AEX	
ATY	ATY	
B07	B07	
B11	B11	
B13	B13	
BKY	BKY	
CCC	CCC	
CCR	CCR	
CND	CND	
DEC	DEC	
DIP	DIP	
DSP	DSP	
DIUP	DIUP	
HLD	HLD	
HOT	HOT	
NEW	NEW	
NPC	NPC	
NSF	NSF	
PCC	PCC	
PDC	PDC	
PIE	PIE	

Add ... Close Status Code

AgencyStatus: Status codes your organization assigns to accounts.

ClientStatus: Status codes that the client uses that corresponds to your organization's status codes.

HoldDays: Number of days to hold an account assigned to the status before returning the account to the customer. This box allows you to assign different hold days than the ones configured in Latitude. To use the hold days configured in Latitude, ensure that this box is blank. For more information, see the *Status Codes* topic.

3. To add a close status code, click **Close Status Code**. AIM Receiver Manager adds a blank row to the data grid.
4. Complete the information and then click **Apply**.

Related Topics

[Client Configuration](#)

[Feedback](#)



View Client History

Use the **History** tab in the **Client Configuration** window to view transaction history for a client.

To view client history

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
2. Click the **History** tab.

3. Specify the date range for which to view transaction history and then click **Get History**. Transactions that occurred within the specified time frame appear in the data grid.
4. To view detail for a transaction, in the data grid, click in the File Name box and then click the Detail icon. The **History Details** dialog box appears.

5. To export the data to Microsoft Excel, do the following:
 - a. Click **Export to Excel**. The **Save As** dialog box appears.
 - b. In the **File name** box, type a name for the file and then click **Save**.

Related Topics

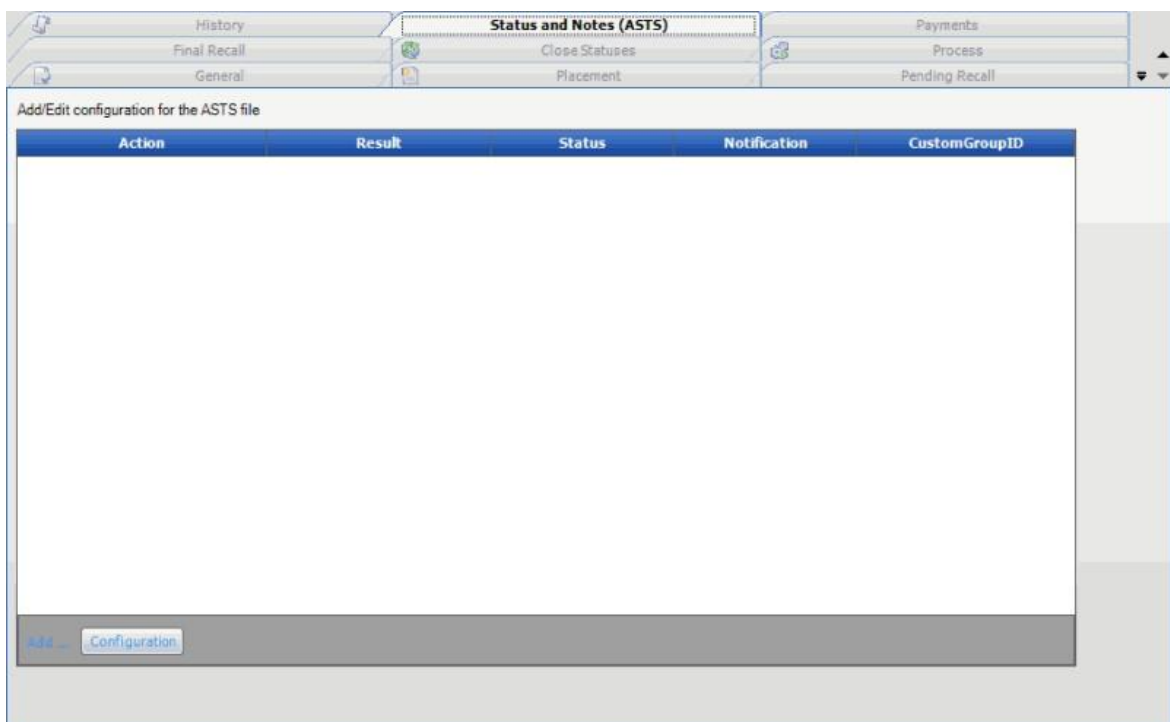
[Client Configuration](#)



Configure Statuses and Notes

Use the **Status and Notes** tab in the **Client Configuration** window to configure action and result codes for account status and note changes. **To configure statuses and notes**

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
2. Click the **Status and Notes** tab.



Action: Action code assigned to the account note.

Result: Result code assigned to the account note.

Status: Status code assigned to the account.

Notification: Notification queue assigned to the account.

CustomGroupID: Custom group assigned to the account.

3. To add a status code, click **Configuration**. AIM Receiver Manager adds a blank row to the data grid.
4. Complete the information and then click **Apply**.

Related Topics

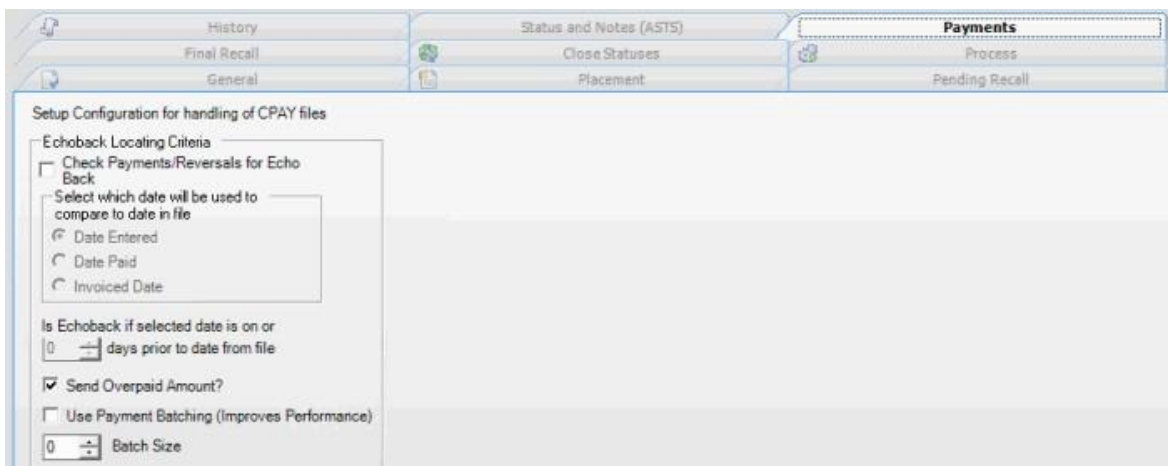
Client Configuration



Configure Payments

Use the **Payments** tab in the **Client Configuration** window to configure payments for a client. You can configure the system to check payment and adjustment transactions for echo-back to prevent recording duplicate transactions. Echo-back is when you send a payment file to the agency or attorney who holds the account and then receive a payment file that contains that same payment or adjustment. **To configure payments**

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
2. Click the **Payments** tab.



3. To check payment and adjustment transactions for echo-back, do the following:
 - a. Select the **Check Payments/Reversals for Echo Back** check box.
 - b. Do one of the following:
 - To compare the date in the payment file to the date you added the payment to the system, click the **Date Entered** check box.
 - To compare the date in the payment file to the payment date, click the **Date Paid** check box.
 - To compare the date in the payment file to the payment invoice date, click the **Invoiced Date** check box.
 - c. Type or select the maximum number of days after the date in the payment file that AIM Receiver Manager considers the transaction an echo-back.

4. To send an overpayment amount, select the **Send Overpaid Amount** check box and then click **Apply**.
5. To allow batch processing of payment transactions, do the following:
 - a. Select the **Use Payment Batching (Improves Performance)** check box.
 - b. In the **Batch Size** box, specify the batch size to use when processing transactions. We recommend that you use a batch size of 50-200. If you select the **Use Payment Batching (Improves Performance)** check box and don't specify a batch size, AIM Receiver defaults to a batch size of 50.
6. Click **Apply**.

Related Topics

[Client Configuration](#)



Configure Requests and Responses

Use the **Request/Response** tab in the **Client Configuration** window to configure requests and responses for a client.

To configure requests and responses

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
2. Click the **Request/Response** tab.

The screenshot shows the 'Request/Response' configuration window. It features three tabs at the top: 'History', 'Status and Notes (ASTS)', and 'Payments'. Below these are three buttons: 'Final Recall', 'Close Statuses', and 'Process'. The main area is divided into two sections: 'Configure Request Codes' and 'Configure Response Codes'. Each section contains a table with three columns: 'Code', 'Description', and 'DefaultText'. Below each table is an 'Add ...' button and a 'Request Code' or 'Response Code' button respectively.

Configure Request Codes

Code: Code that identifies the request.

Description: Description of the request.

DefaultText: Default text to include in the request.

Configure Response Codes

Code: Code that identifies the response.

Description: Description of the response.

DefaultText: Default text to include in the response.

3. To add a request code, click **Request Code**. AIM Receiver Manager adds a blank row to the data grid.
4. To add a response code, click **Response Code**. AIM Receiver Manager adds a blank row to the data grid.
5. Complete the information and then click **Apply**.

Related Topics

[Client Configuration](#)

Configure Letter Work Efforts

Use the **Letter Efforts** tab on the **Work Effort** tab in the **Client Configuration** window to configure work efforts related to letters.

To configure letter work efforts

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
2. Click the **Work Effort** tab and then click the **Letter Efforts** tab.

The screenshot shows the 'Client Configuration' window with the 'Work Effort' tab selected. Within this tab, the 'Letter Efforts' sub-tab is active. The main area is a data grid with the following headers: 'LetterCode', 'ActionCategory', 'ActionCode', and 'ActionText'. The grid is currently empty. Below the grid, on the left, there is an 'Add...' button and a 'Letter Effort' button. At the bottom right of the window, there are three buttons: 'Save', 'Cancel', and 'Apply'.

Letter Code: Code that identifies a letter in Letter Console.

Action Category: Category that your organization assigned to group the letter action.

Action Code: Code that your organization assigned to identify the letter action.

Action Text: Comment or description that your organization associated to the letter action.

3. To add a letter effort, click **Letter Effort**. AIM Receiver Manager adds a blank row to the data grid.
4. Complete the information and then click **Apply**.

Related Topics

[Client Configuration](#)

[Feedback](#)



Configure Note Work Efforts

Use the **Note Efforts** tab on the **Work Effort** tab in the **Client Configuration** window to configure work efforts related to notes. You can configure a note work effort using an action and result code together, or just one of the two.

To configure note work efforts

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
2. Click the **Work Effort** tab and then click the **Note Efforts** tab.

ActionCategory	ActionCode	ActionText	action	result
----------------	------------	------------	--------	--------

Action Category: Category that your organization assigned to group the note action.

Action Code: Code that your organization assigned to identify the note action.

Action Text: Comment or description that your organization associated to the note action.

Action: Unique code that identifies an action in Latitude.

Result: Unique code that identifies the result of an action in Latitude.

3. To add a note effort, click **Note Effort**. AIM Receiver Manager adds a blank row to the data grid.

4. Complete the information and then click **Apply**.

Related Topics

[Client Configuration](#)

Import Overview



[Feedback](#)

Import Overview

You have two options for importing AIM client data into AIM Receiver. The first option is to import client data from all the files in one or more client folders. The second option is to import client data for a specific client and type of data (for example, payments, recalls, notes).

Related Topics

[Import All Files in a Folder](#)

[Import Assets](#)

[Import Account Notes](#)

[Import Account Placements](#)

[Import Account Recalls](#)

[Import Bankruptcy Data](#)

[Import Complaints](#)

[Import Deceased Debtor Data](#)

[Import Demographic Data](#)

[Import Disputes](#)

[Import Equipment](#)

[Import Judgment Data](#)

[Import Miscellaneous Extra Data](#)

[Import Payments](#)

[Import Requests and Responses](#)



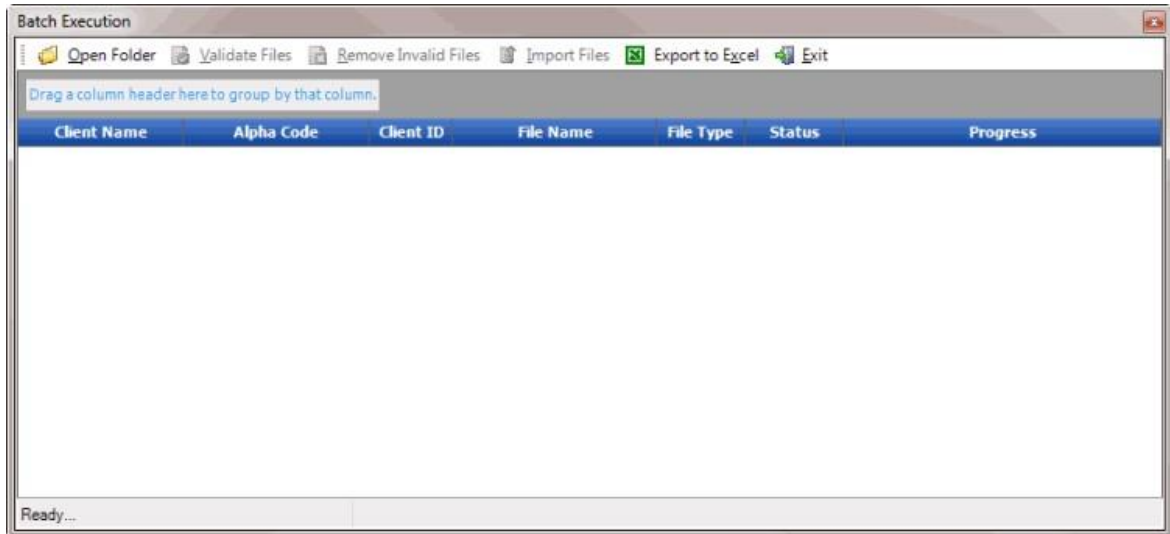
[Feedback](#)

Import All Files in a Folder

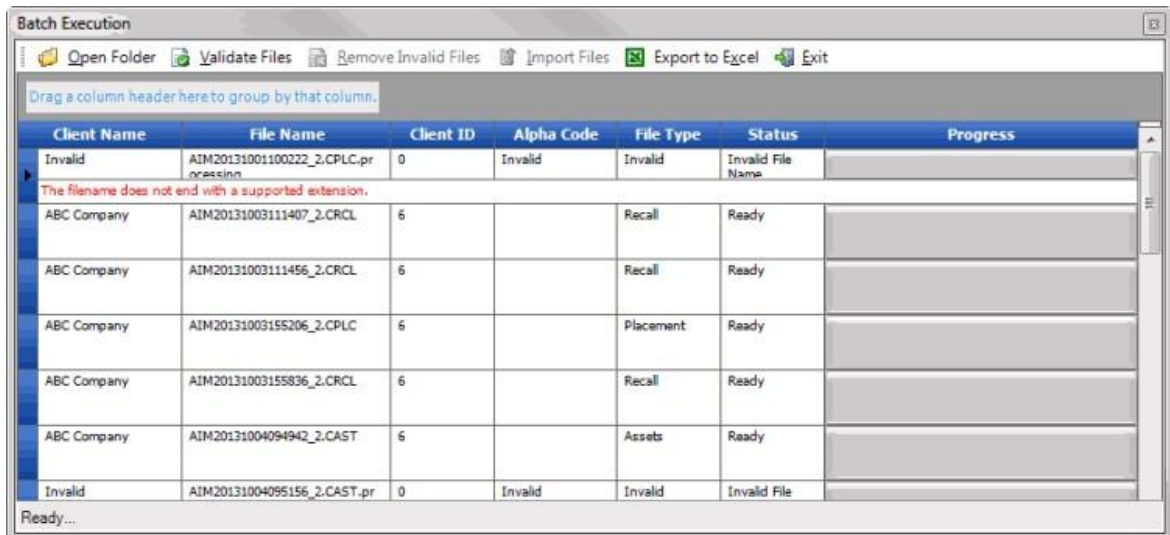
Use the **Batch Execution** window to import AIM client data from all the files in a folder. You can select a folder for a specific client and only import those files, or, you can select a folder at a higher level and

import files for multiple clients. AIM Receiver Manager flags for removal invalid files and files that AIM Receiver Manager processed previously. **To import all files in a folder**

1. In the menu bar, click **Actions > Import > Import All Files From Folder**. The **Batch Execution** window appears.



2. In the toolbar, click **Open Folder**. The **Browse for Folder** dialog box appears.
3. Click the folder for the import files and then click **OK**. The files appear in the **Batch Execution** window. The Status column indicates whether a file is ready for validation or has errors. If a file has errors, AIM Receiver Manager displays the errors in the window.



4. In the toolbar, click **Validate Files**. The system verifies whether the file structure is valid. If a file is invalid, the **Processed** check box is selected.

Client Name	File Name	Client ID	Alpha Code	File Type	Status	Progress	Record Count	Processed
Invalid	AIM20131001100222_2.C PIC_processing	0	Invalid	Invalid	Invalid File Name		0	<input type="checkbox"/>
The filename does not end with a supported extension.								
ABC Company	AIM20131003111407_2.C RCI	6		Recall	Invalid		0	<input type="checkbox"/>
File is an invalid XML file.								
ABC Company	AIM20131003111456_2.C RCI	6		Recall	Invalid		0	<input type="checkbox"/>
File is an invalid XML file.								
ABC Company	AIM20131003155206_2.C PIC	6		Placement	Invalid		0	<input type="checkbox"/>
File is an invalid XML file.								
ABC Company	AIM20131003155836_2.C RCI	6		Recall	Invalid		0	<input type="checkbox"/>
File is an invalid XML file.								
ABC Company	AIM20131004094942_2.C AST	6		Assets	Invalid		0	<input type="checkbox"/>
File is an invalid XML file.								
Invalid	AIM20131004095156_2.C	0	Invalid	Invalid	Invalid File		0	<input type="checkbox"/>

- In the toolbar, click **Remove Invalid Files**. AIM Receiver Manager deletes invalid files from the data grid, and only displays the valid files. If AIM Receiver Manager imported a file previously, the **Processed** check box is selected.
- To delete files that AIM Receiver Manager processed previously to prevent duplicate processing, click the file and then press the **Delete** key. In the confirmation dialog box, click **Yes**. AIM Receiver Manager deletes the file.
- In the toolbar, click **Import Files**. A progress bar shows that status of the import process.
- When the import is complete, in the toolbar, click **Exit**.
- To review any processing errors, do the steps to [View Client History](#).
- To view batch numbers for imported payments, open the **Payment Entry** window in Latitude. AIM Receiver Manager notes the exceptions for payment reversals without a matching payment.

Related Topics

[Import Overview](#)



[Feedback](#)

Import Assets

Use the **Process** tab in the **Client Configuration** window to import debtor assets that the client added or updated after placing the accounts with your organization. **To import assets**

- In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

Client Configuration

Client Name

My Agency Id

0

AIM Client Version

8.2*

☐ Using Alpha Code In File Names

My Alpha Code

History

Status and Notes (ASTS)

Payments

Final Recall

Close Statuses

Process

General

Placement

Pending Recall

Description

ABC Agency

Contact Name

Phone

555-555-5555

Email

aadams@abcagency.com

Address

1000 Main St
Jacksonville, FL 32256

Last Received

Placement

Pending Recall

Final Recall

Payment

Demographic

Notes

Misc Extra Data

Equipment

Request/Response

Judgment

Deceased

Bankruptcy

Complaint

Dispute

Last Sent

Recall Objection

Payment

Demographic

Close

Bankruptcy

Deceased

Reconciliation

Request/Response

Acknowledgment

Asset

Judgment

Status/Notes

Activity Notes

Work Efforts

Complaint

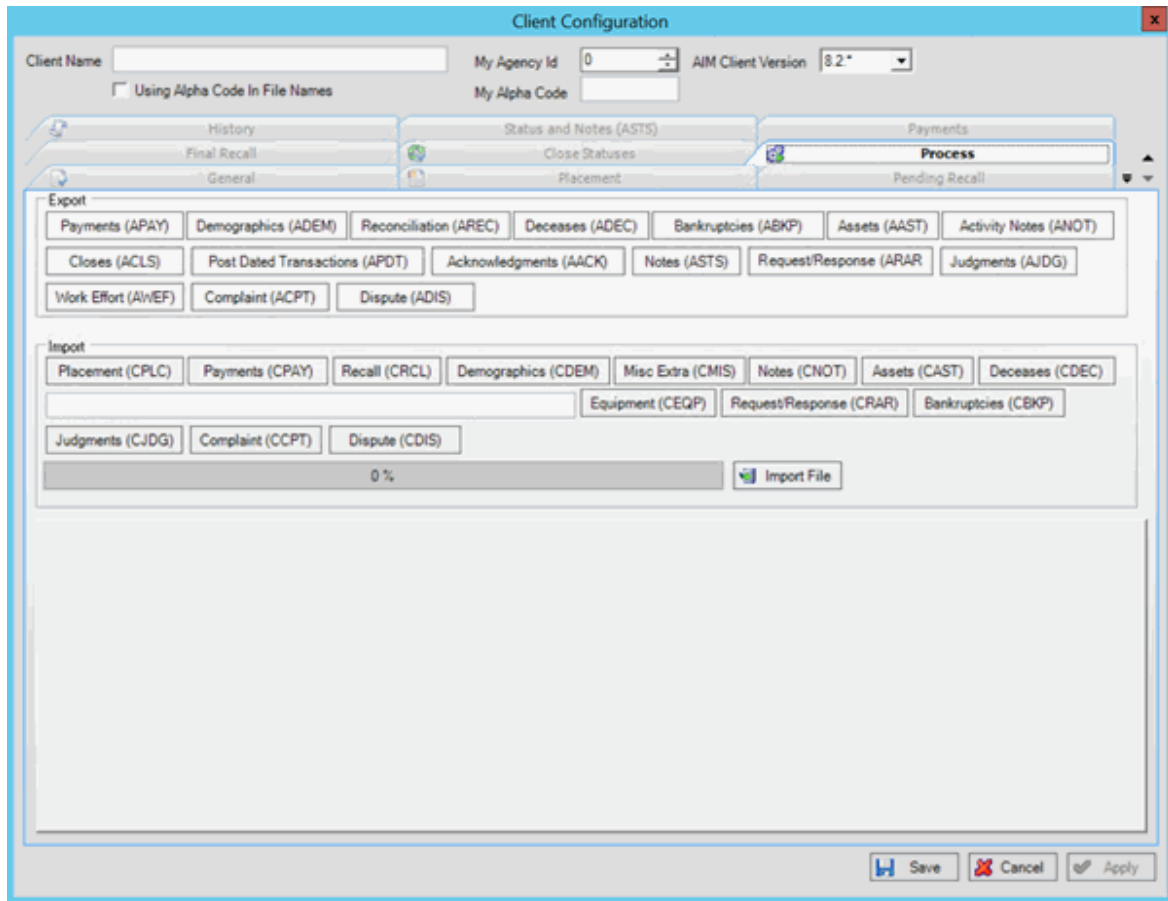
Dispute

Save

Cancel

Apply

- Click the **Process** tab.



3. In the **Import** section, click **Assets (CAST)**. The **Open** dialog box appears.
4. Click the Assets file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
5. Click **OK**. Data from the file appears in the preview window.
6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
7. Click **OK**.
8. To review any processing errors, click the **History** tab.

Related Topics

[Import Overview](#)



Import Account Notes

Use the **Process** tab in the **Client Configuration** window to import notes that the client added or updated after placing the accounts with your organization. The import file only includes user notes, not system notes.

To import account notes

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

The screenshot shows the 'Client Configuration' window with the 'General' tab selected. The window includes the following elements:

- Title Bar:** Client Configuration
- Client Information:**
 - Client Name: [Text Field]
 - My Agency Id: 0
 - AIM Client Version: 8.2
 - My Alpha Code: [Text Field]
 - ☐ Using Alpha Code In File Names
- Tabs:** History, Status and Notes (ASTS), Payments, Final Recall, Close Statuses, Process, Pending Recall. The 'General' tab is active.
- General Tab Fields:**
 - Description: ABC Agency
 - Contact Name: [Text Field]
 - Phone: 555-555-5555
 - Email: adams@abcagency.com
 - Address: 1000 Main St, Jacksonville, FL 32256
- Dropdown Menus:**
 - Last Received Placement
 - Last Sent Recall Objection
 - Complaint
 - Dispute
- Buttons:** Save, Cancel, Apply

2. Click the **Process** tab.

The screenshot shows the 'Client Configuration' window. At the top, there are fields for 'Client Name', 'My Agency Id' (set to 0), and 'AIM Client Version' (set to 8.2). Below these are checkboxes for 'Using Alpha Code In File Names' and 'My Alpha Code'. The window has several tabs: 'History', 'Status and Notes (ASTS)', 'Payments', 'Final Recall', 'Close Statuses', 'Process', 'General', 'Placement', and 'Pending Recall'. The 'Process' tab is currently selected. Under the 'Process' tab, there are two main sections: 'Export' and 'Import'. The 'Export' section contains buttons for Payments (APAY), Demographics (ADEM), Reconciliation (AREC), Deceases (ADEC), Bankruptcies (ABKP), Assets (AAS), Activity Notes (ANOT), Closes (ACLS), Post Dated Transactions (APDT), Acknowledgments (AACK), Notes (ASTS), Request/Response (ARAR), Judgments (AJDG), Work Effort (AWEF), Complaint (ACPT), and Dispute (ADIS). The 'Import' section contains buttons for Placement (CPLC), Payments (CPAY), Recall (CRCL), Demographics (CDEM), Misc Extra (CMIS), Notes (CNOT), Assets (CAST), Deceases (CDEC), Equipment (CEQP), Request/Response (CRAR), Bankruptcies (CBKP), Judgments (CJDG), Complaint (CCPT), and Dispute (CDIS). Below the 'Import' section is a progress bar showing 0% and an 'Import File' button. At the bottom right, there are 'Save', 'Cancel', and 'Apply' buttons.

3. In the **Import** section, click **Notes (CNOT)**. The **Open** dialog box appears.
4. Click the Notes file to import and then, in the **Import** section, click **Open**. A notification dialog box appears, which shows the number of records in the file.
5. Click **OK**. Data from the file appears in the preview window.
6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
7. Click **OK**.
8. To review any processing errors, click the **History** tab.

Related Topics

[Import Overview](#)



Import Account Placements

Use the **Process** tab in the **Client Configuration** window to import accounts the client is placing with your organization.

To import account placements

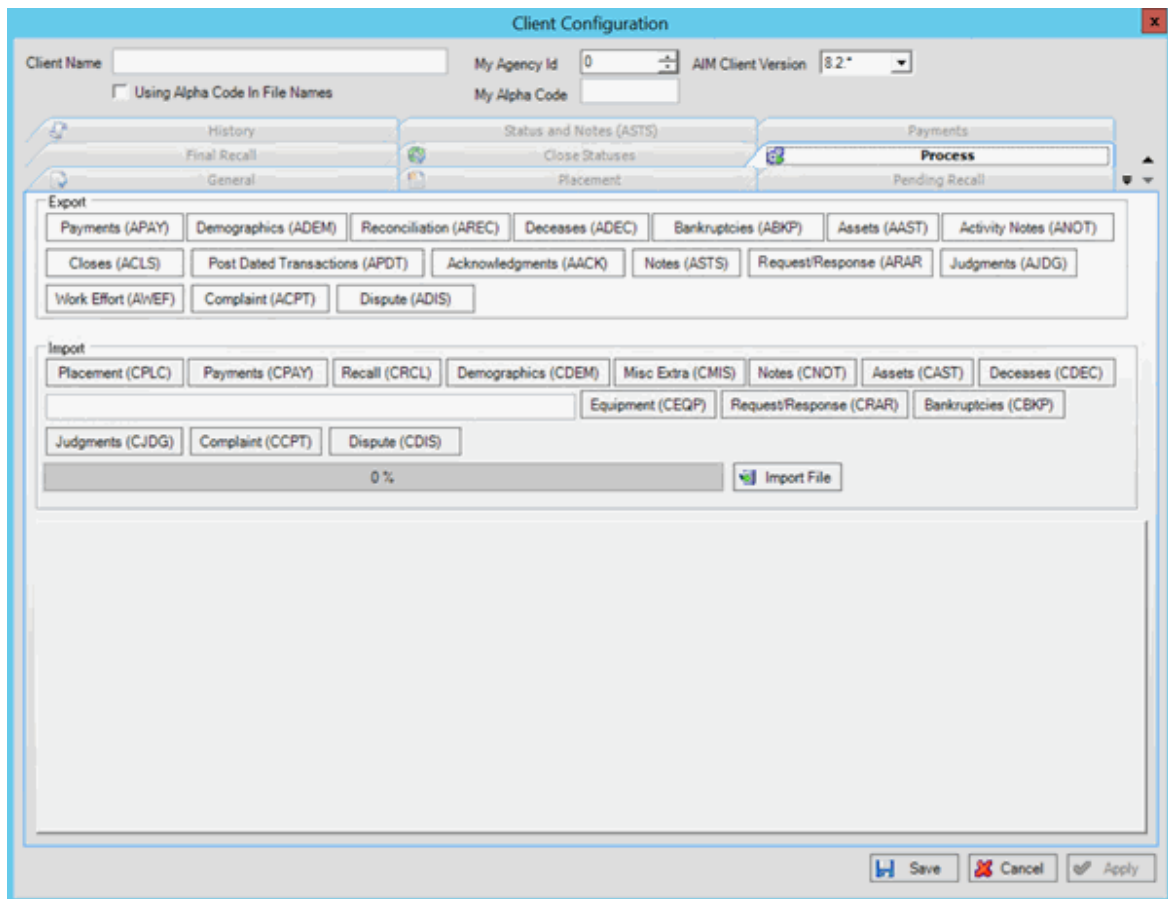
1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

The screenshot shows the 'Client Configuration' window with the 'General' tab selected. The window has a title bar with a close button. Below the title bar, there are fields for 'Client Name', 'My Agency Id' (set to 0), 'AIM Client Version' (set to 8.2), and 'My Alpha Code'. A checkbox 'Using Alpha Code In File Names' is present. The main area is divided into three sections: 'History' (with 'Final Recall'), 'Status and Notes (ASTS)' (with 'Close Statuses' and 'Placement'), and 'Payments' (with 'Process' and 'Pending Recall'). The 'General' tab is active, showing fields for 'Description' (ABC Agency), 'Contact Name', 'Phone' (555-555-5555), 'Email' (aadam@abcagency.com), and 'Address' (1000 Main St, Jacksonville, FL 32256). Below these are two columns of dropdown menus for 'Last Received' and 'Last Sent' categories, including 'Placement', 'Recall Objection', 'Payment', 'Demographic', 'Close', 'Bankruptcy', 'Deceased', 'Reconciliation', 'Request/Response', 'Acknowledgment', 'Asset', 'Judgment', 'Status/Notes', 'Activity Notes', 'Work Efforts', 'Complaint', and 'Dispute'. At the bottom right are 'Save', 'Cancel', and 'Apply' buttons.

2. Click the **Placement** tab.

The screenshot shows the 'Client Configuration' window with the 'Placement' tab selected. The window displays instructions: 'Choose the customer and desk to import accounts into when a placement file is received.' There are three radio buttons: 'From Placement File' (selected), 'Use Predefined Customer' (with a dropdown showing 'DEFAULT CUSTOMER'), and 'Customer Mapping Logic'. Below these is a table with two columns: 'Client Customer' and 'Agency Customer'. The table has one row with 'Default Customer' and 'ABC Agency'. At the bottom left of the table is a 'New Customer Mapping' button. Below the table are checkboxes for 'Use Desk from Placement File' and a 'Desk' dropdown menu set to 'COLLECTOR DESK'.

3. Verify that you selected the correct customer and desk to which to move the accounts before importing the placement data.
4. Click the **Process** tab.



5. In the **Import** section, click **Placement (CPLC)**. The **Open** dialog box appears.
6. Click the Placement file to import and then click **Open**. A notification dialog box appears, which shows the number of records and total account balance in the file.
7. Click **OK**. Data from the file appears in the preview window.
8. To review debtor information, click the plus sign (+) next to a file number. An account can have multiple debtors associated to it.
9. After reviewing the data, click **Import File**. When the import process is complete, a notification dialog box appears.
10. Click **OK**.
11. To review any processing errors, click the **History** tab.

Related Topics

[Import Overview](#)


[Feedback](#)

Import Account Recalls

Use the **Process** tab in the **Client Configuration** window to import pending and final recalls received from the client for accounts that the client placed with your organization. For pending recalls, AIM Receiver Manager creates an objection file automatically for accounts that match the criteria specified on the **Pending Recall** tab. For final recalls, AIM Receiver Manager closes and returns accounts to the client with a queue level of "999" and a status of "RCL." Also, AIM Receiver Manager moves accounts to the desk specified on the **Final Recall** tab. **To import account recalls**

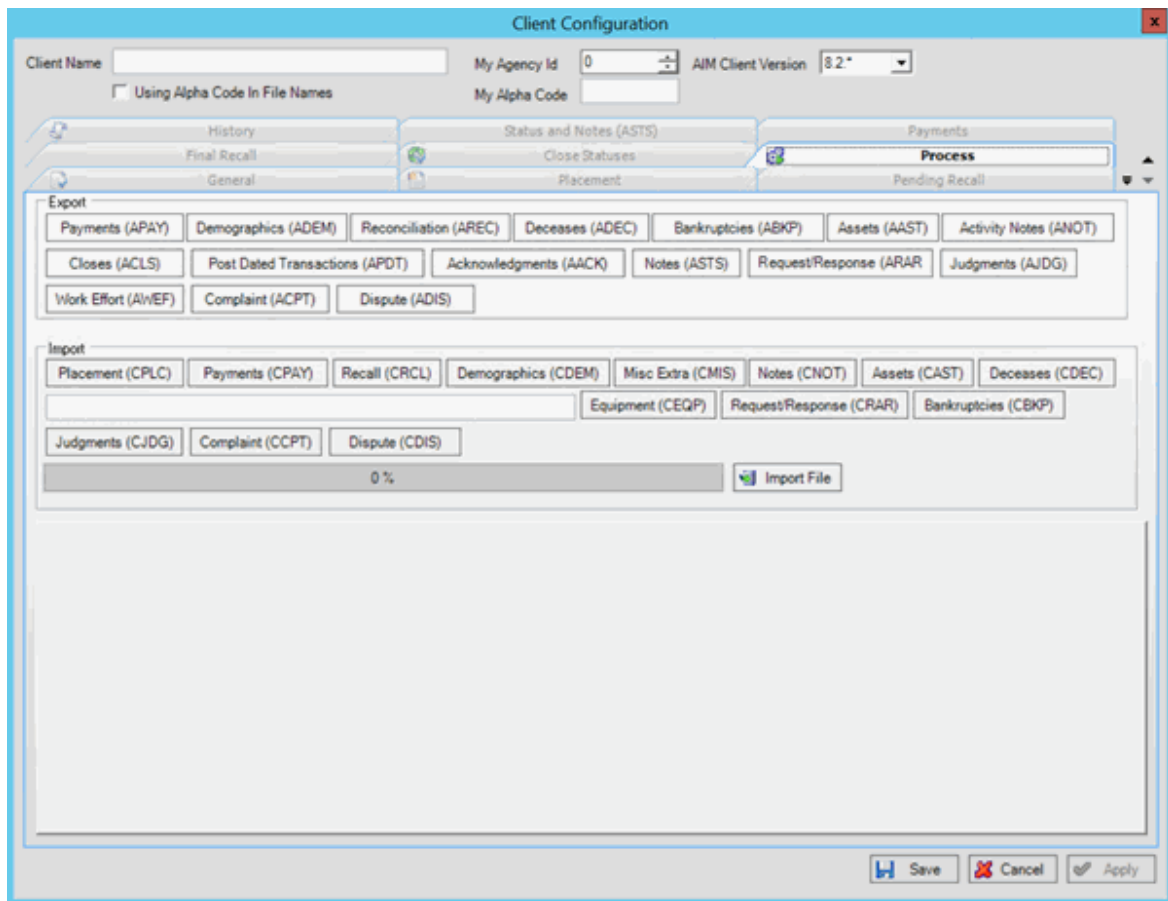
1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
2. Click the **Pending Recall** tab.

The screenshot shows the 'Pending Recall' configuration window. At the top, there are tabs: 'History', 'Status and Notes (ASTS)', 'Payments', 'Process', and 'Pending Recall'. The 'Pending Recall' tab is active. Below the tabs, there is a section titled 'If an account is not being objected to change account status to...' with a dropdown menu set to 'ACT - ACTIVE ACCOUNT'. Below this, there is a section titled 'Configure the following conditions that will trigger a recall objection to be sent when a pending recall is received.' with two checked checkboxes: 'When there are promises to pay.' and 'When there are post dated checks.' To the right of these checkboxes is a field 'Received a payment with this number of days.' set to '5'. Below this, there are two sections: 'When the account is one in one of the following statuses.' and 'When the account is one in one of the following queues.' Each section has a list of checkboxes and a scroll bar. The 'statuses' list includes: ACT - ACTIVE ACCOUNT, AEX - ALL EFFORTS EXHAUSTED, ATY - ATTORNEY REPRESENTED ON ACCT, B07 - CHAPTER 7 BANKRUPTCY, B11 - CHAPTER 11 BANKRUPTCY, B13 - CHAPTER 13 BANKRUPTCY, BKY - BANKRUPTCY PENDING, CCC - CONSUMER CREDIT COUNSELING, CCR - CLOSED CLIENT REQUEST, CND - CEASE AND DESIST, DEC - DEBTOR IS DECEASED, DIP - DEBTOR IN PRISON, DSP - DEBTOR DISPUTES BALANCE, DUP - DUPLICATE, HLD - CLIENT PUT ON HOLD, HOT - SPECIAL INTEREST ACCOUNT, LET - SPECIAL LETTER SERIES, and LOP - LETTER OF PROTECTION. The 'queues' list includes: 000 - REMINDER, 010 - BROKEN PROMISE, 011 - NO MORE POSTDATED CHECKS, 012 - BOUNCED CHECKS, 013 - NO MORE PROMISES, 015 - NEW ACCOUNTS, 016 - NEWBIZ FOLLOWUP, 018 - PDC OVER \$500, 019 - NSF STILL HAS PDCS ON FILE, 020 - ACCOUNTS 0-30 DAYS OLD, 025 - ACCOUNTS W/PAYMENT, 030 - ACCOUNTS 30-60 DAYS OLD, 060 - ACCOUNTS 60-90 DAYS, 090 - ACCOUNTS 90-120 DAYS OLD, 100 - ACCOUNT REASSIGNED, 120 - OVER 120 DAYS OLD, 200 - RETURNED WITH CREDIT REPORT, and 400 - LATE NIGHT EST.

3. Verify that the configuration is correct.
4. Click the **Final Recall** tab.

The screenshot shows the 'Final Recall' configuration window. At the top, there are tabs: 'History', 'Status and Notes (ASTS)', 'Payments', 'Process', and 'Final Recall'. The 'Final Recall' tab is active. Below the tabs, there is a section titled 'Make these changes to the account when a final recall is received.' with a field 'Move to Desk:' set to '0000000'.

5. Verify that the configuration is correct.
6. Click the **Process** tab.



7. In the **Import** section, click **Recall (CRCL)**. The **Open** dialog box appears.
8. Click the Recall file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
9. Click **OK**. Data from the file appears in the preview window.
10. Review the data and then click **Import File**.
11. If the import file contains pending recalls, AIM Receiver Manager creates an objection file and displays a dialog box. In the dialog box, click the folder to save the file to and then click **Save**.
12. In the notification dialog box, click **OK**.
13. To review any processing errors, click the **History** tab.

Related Topics

[Import Overview](#)



[Feedback](#)

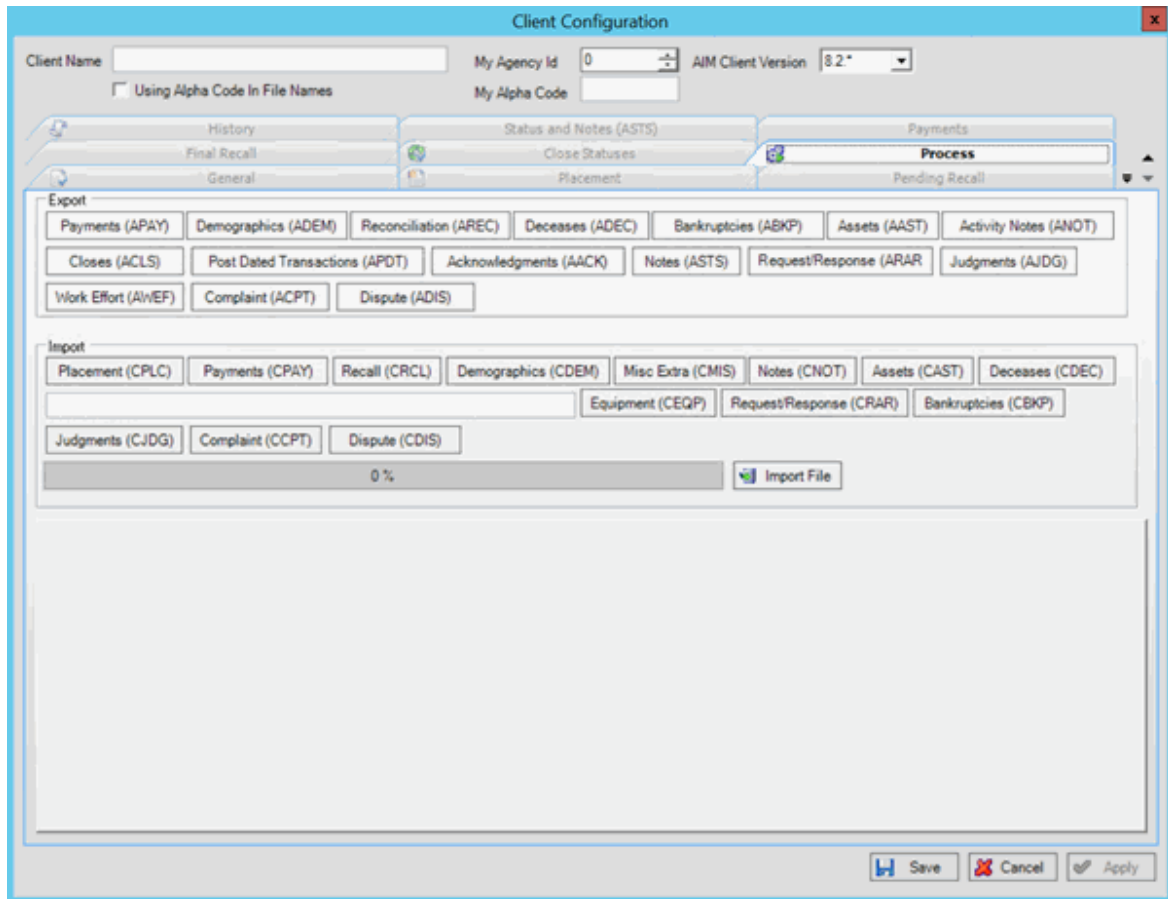
Import Bankruptcy Data

Use the **Process** tab in the **Client Configuration** window to import bankruptcy data that the client added or updated after placing the accounts with your organization. **To import bankruptcy data**

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

The screenshot shows the 'Client Configuration' window with the 'General' tab selected. The window has a title bar with a close button. Below the title bar, there are input fields for 'Client Name', 'My Agency Id' (set to 0), and 'AIM Client Version' (set to 8.2). There is also a checkbox for 'Using Alpha Code In File Names' and a field for 'My Alpha Code'. Below these are three tabs: 'History', 'Status and Notes (ASTS)', and 'Payments'. The 'Status and Notes (ASTS)' tab is active, showing sub-tabs: 'Final Recall', 'Close Statuses', 'Placement', and 'Pending Recall'. The 'General' sub-tab is selected, displaying a form with the following fields: 'Description' (ABC Agency), 'Contact Name', 'Phone' (555-555-5555), 'Email' (aadam@abcagency.com), and 'Address' (1000 Main St, Jacksonville, FL 32256). Below these fields are two columns of dropdown menus. The left column is labeled 'Last Received' and includes: Placement, Pending Recall, Final Recall, Payment, Demographic, Notes, Misc Extra Data, Equipment, Request/Response, Judgment, Deceased, Bankruptcy, Complaint, and Dispute. The right column is labeled 'Last Sent' and includes: Recall Objection, Payment, Demographic, Close, Bankruptcy, Deceased, Reconciliation, Request/Response, Acknowledgment, Asset, Judgment, Status/Notes, Activity Notes, and Work Efforts. To the right of these columns are two more dropdown menus labeled 'Complaint' and 'Dispute'. At the bottom right of the window are three buttons: 'Save', 'Cancel', and 'Apply'.

2. Click the **Process** tab.



3. In the **Import** section, click **Bankruptcies (CBKP)**. The **Open** dialog box appears.
4. Click the Bankruptcy file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
5. Click **OK**. Data from the file appears in the preview window.
6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
7. Click **OK**.
8. To review any processing errors, click the **History** tab.

Related Topics

[Import Overview](#)



Import Complaints

Use the **Process** tab in the **Client Configuration** window to import complaints that the client added or updated after placing the accounts with your organization.

Note: The complaints import feature is not available for AIM Receiver versions earlier than version 12.0.

To import complaints

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

The screenshot shows the 'Client Configuration' window with the 'General' tab selected. The window has a title bar with a close button. Below the title bar, there are input fields for 'Client Name', 'My Agency Id' (set to 0), and 'AIM Client Version' (set to 8.2). There is also a checkbox for 'Using Alpha Code In File Names' and a field for 'My Alpha Code'. Below these are three tabs: 'History', 'Status and Notes (ASTS)', and 'Payments'. The 'General' tab is active, showing a form with fields for 'Description' (ABC Agency), 'Contact Name', 'Phone' (555-555-5555), 'Email' (aadam@abcagency.com), and 'Address' (1000 Main St, Jacksonville, FL 32256). Below the form are two columns of dropdown menus for 'Last Received' and 'Last Sent' categories, including options like Placement, Pending Recall, Final Recall, Payment, Demographic, Notes, Misc Extra Data, Equipment, Request/Response, Judgment, Deceased, Bankruptcy, Complaint, and Dispute. At the bottom right are 'Save', 'Cancel', and 'Apply' buttons.

2. Click the **Process** tab.

The screenshot shows the 'Client Configuration' window. At the top, there are fields for 'Client Name', 'My Agency Id' (set to 0), and 'AIM Client Version' (set to 8.2). Below these are checkboxes for 'Using Alpha Code In File Names' and 'My Alpha Code'. The window has several tabs: 'History', 'Status and Notes (ASTS)', 'Payments', 'Final Recall', 'Close Statuses', 'Process', 'General', 'Placement', and 'Pending Recall'. The 'Process' tab is active. Under the 'Process' tab, there are two main sections: 'Export' and 'Import'. The 'Export' section contains buttons for Payments (APAY), Demographics (ADEM), Reconciliation (AREC), Deceases (ADEC), Bankruptcies (ABKP), Assets (AAS), Activity Notes (ANOT), Closes (ACLS), Post Dated Transactions (APDT), Acknowledgments (AACK), Notes (ASTS), Request/Response (ARAR), Judgments (AJDG), Work Effort (AWEF), Complaint (ACPT), and Dispute (ADIS). The 'Import' section contains buttons for Placement (CPLC), Payments (CPAY), Recall (CRCL), Demographics (CDEM), Misc Extra (CMIS), Notes (CNOT), Assets (CAST), Deceases (CDEC), Equipment (CEQP), Request/Response (CRAR), Bankruptcies (CBKP), Judgments (CJDG), Complaint (CCPT), and Dispute (CDIS). Below the 'Import' section is a progress bar showing 0% and an 'Import File' button. At the bottom right, there are 'Save', 'Cancel', and 'Apply' buttons.

3. In the **Import** section, click **Complaint (CCPT)**. The **Open** dialog box appears.
4. Click the Complaints file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
5. Click **OK**. Data from the file appears in the preview window.
6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
7. Click **OK**.
8. To review any processing errors, click the **History** tab.

Related Topics

[Import Overview](#)



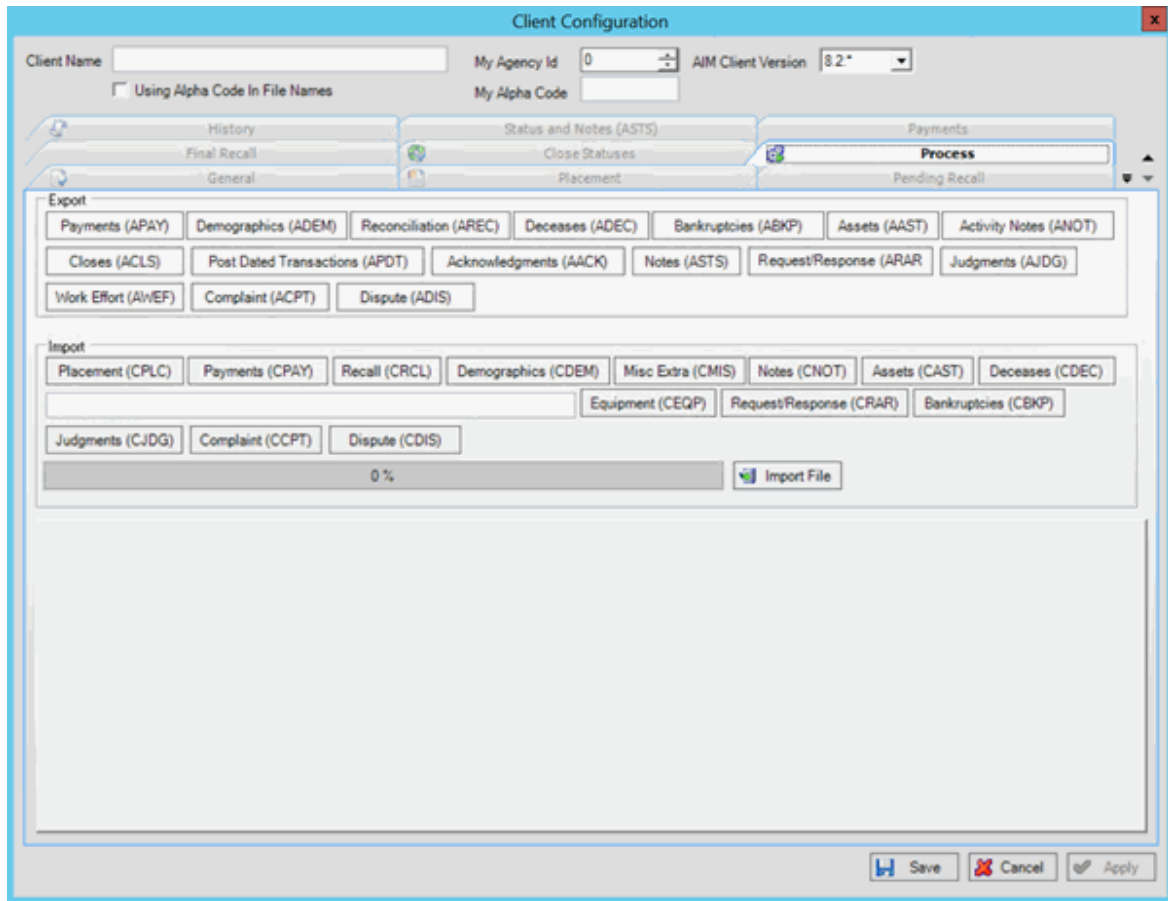
Import Deceased Debtor Data

Use the **Process** tab in the **Client Configuration** window to import deceased debtor data that the client added or updated after placing the accounts with your organization. **To import deceased debtor data**

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

The screenshot shows the 'Client Configuration' window with the 'General' tab selected. The window has a title bar with a close button. Below the title bar, there are input fields for 'Client Name', 'My Agency Id' (set to 0), and 'AIM Client Version' (set to 8.2). There is also a checkbox for 'Using Alpha Code In File Names' and a field for 'My Alpha Code'. Below these are three tabs: 'History', 'Status and Notes (ASTS)', and 'Payments'. The 'General' tab is active, showing a form with fields for 'Description' (ABC Agency), 'Contact Name', 'Phone' (555-555-5555), 'Email' (aadam@abcagency.com), and 'Address' (1000 Main St, Jacksonville, FL 32256). Below the form are two columns of dropdown menus. The left column is labeled 'Last Received' and includes: Placement, Pending Recall, Final Recall, Payment, Demographic, Notes, Misc Extra Data, Equipment, Request/Response, Judgment, Deceased, Bankruptcy, Complaint, and Dispute. The right column is labeled 'Last Sent' and includes: Recall Objection, Payment, Demographic, Close, Bankruptcy, Deceased, Reconciliation, Request/Response, Acknowledgment, Asset, Judgment, Status/Notes, Activity Notes, and Work Efforts. At the bottom right, there are buttons for 'Save', 'Cancel', and 'Apply'.

2. Click the **Process** tab.



3. In the **Import** section, click **Deceases (CDEC)**. The **Open** dialog box appears.
4. Click the Deceased file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
5. Click **OK**. Data from the file appears in the preview window.
6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
7. Click **OK**.
8. To review any processing errors, click the **History** tab.

Related Topics

[Import Overview](#)



Import Demographic Data

Use the **Process** tab in the **Client Configuration** window to import demographic data (phones, phone consent, and addresses) that the client added or updated after placing the accounts with your organization.

To import demographic data

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

The screenshot shows the 'Client Configuration' window with the 'General' tab selected. The window has a title bar and a close button. Below the title bar, there are fields for 'Client Name', 'My Agency Id' (set to 0), 'AIM Client Version' (set to 8.2), and 'My Alpha Code'. A checkbox 'Using Alpha Code In File Names' is also present. The main area is divided into three sections: 'History' (with 'Final Recall' and 'Placement' sub-sections), 'Status and Notes (ASTS)' (with 'Close Statuses' and 'Pending Recall' sub-sections), and 'Payments' (with 'Process' and 'Pending Recall' sub-sections). The 'General' tab is active, showing a 'Description' field with 'ABC Agency', 'Contact Name', 'Phone' (555-555-5555), 'Email' (adams@abcagency.com), and 'Address' (1000 Main St, Jacksonville, FL 32256). Below these fields are two columns of dropdown menus for 'Last Received' and 'Last Sent' events, including 'Placement', 'Recall Objection', 'Payment', 'Demographic', 'Close', 'Bankruptcy', 'Deceased', 'Reconciliation', 'Request/Response', 'Acknowledgment', 'Asset', 'Judgment', 'Status/Notes', 'Activity Notes', 'Work Efforts', 'Complaint', and 'Dispute'. At the bottom right, there are 'Save', 'Cancel', and 'Apply' buttons.

2. Click the **Process** tab.

The screenshot shows the 'Client Configuration' window with the 'Process' tab selected. The 'Import' section is active, displaying a grid of buttons for various data types: Payments (CPAY), Recall (CRCL), Demographics (CDEM), Misc Extra (CMIS), Notes (CNOT), Assets (CAST), Deceases (CDEC), Judgments (CJDG), Complaint (CCPT), and Dispute (CDIS). A progress bar at the bottom of the import section shows 0% completion. The 'Import File' button is visible at the bottom right of the import section. The window also includes fields for Client Name, My Agency Id, My Alpha Code, and AIM Client Version.

3. In the **Import** section, click **Demographics (CDEM)**. The **Open** dialog box appears.
4. Click the Demographic file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
5. Click **OK**. Data from the file appears in the preview window.
6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
7. Click **OK**.
8. To review any processing errors, click the **History** tab.

Related Topics

[Import Overview](#)



Import Disputes

Use the **Process** tab in the **Client Configuration** window to import disputes that the client added or updated after placing the accounts with your organization.

Note: The disputes import feature is not available for AIM Receiver versions earlier than version 12.0.

To import disputes

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

The screenshot shows the 'Client Configuration' window with the 'General' tab selected. The window has a title bar with 'Client Configuration' and a close button. Below the title bar, there are input fields for 'Client Name', 'My Agency Id' (set to 0), and 'AIM Client Version' (set to 8.2). There is also a checkbox for 'Using Alpha Code In File Names' and a field for 'My Alpha Code'. Below these are three tabs: 'History', 'Status and Notes (ASTS)', and 'Payments'. The 'General' tab is active, showing a form with fields for 'Description' (ABC Agency), 'Contact Name', 'Phone' (555-555-5555), 'Email' (aadam@abcagency.com), and 'Address' (1000 Main St, Jacksonville, FL 32256). Below the form are two columns of dropdown menus for 'Last Received' and 'Last Sent' categories, including options like Placement, Pending Recall, Final Recall, Payment, Demographic, Notes, Misc Extra Data, Equipment, Request/Response, Judgment, Deceased, Bankruptcy, Complaint, and Dispute. At the bottom right are 'Save', 'Cancel', and 'Apply' buttons.

2. Click the **Process** tab.

The screenshot shows the 'Client Configuration' window with the 'Import' section selected. The window has a title bar 'Client Configuration' and a close button. Below the title bar, there are fields for 'Client Name', 'My Agency Id' (set to 0), and 'AIM Client Version' (set to 8.2). There is also a checkbox for 'Using Alpha Code In File Names' and a field for 'My Alpha Code'. The main area is divided into tabs: 'History', 'Status and Notes (ASTS)', 'Payments', 'General', 'Close Statuses', 'Placement', and 'Pending Recall'. The 'Import' section is active, showing a grid of buttons for various data types: Payments (APAY), Demographics (ADEM), Reconciliation (AREC), Deceases (ADEC), Bankruptcies (ABKP), Assets (AAS), Activity Notes (ANOT), Closes (ACLS), Post Dated Transactions (APDT), Acknowledgments (AACK), Notes (ASTS), Request/Response (ARAR), Judgments (AJDG), Work Effort (AWEF), Complaint (ACPT), and Dispute (ADIS). Below this grid, there is a progress bar showing 0% and an 'Import File' button. At the bottom right, there are 'Save', 'Cancel', and 'Apply' buttons.

3. In the **Import** section, click **Dispute (CDIS)**. The **Open** dialog box appears.
4. Click the Disputes file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
5. Click **OK**. Data from the file appears in the preview window.
6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
7. Click **OK**.
8. To review any processing errors, click the **History** tab.

Related Topics

[Feedback](#)

Use the **Process** tab in the **Client Configuration**

[Import Overview](#)



Import Equipment

Use the **Import Equipment** window to import equipment that the client added or updated after placing the accounts with your organization. **To**

import equipment

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

The screenshot shows the 'Client Configuration' window with the 'General' tab selected. The window contains the following fields and sections:

- Client Name:** [Text Field]
- My Agency Id:** [Text Field]
- AIM Client Version:** [Dropdown Menu]
- Using Alpha Code In File Names:** [Checkbox]
- My Alpha Code:** [Text Field]
- Tabs:** History, Status and Notes (ASTS), Payments, Close Statuses, Process, Pending Recall, Placement.
- Description:** ABC Agency
- Contact Name:** [Text Field]
- Phone:** 555-555-5555
- Email:** aadams@abcagency.com
- Address:** 1000 Main St, Jacksonville, FL 32256
- Last Received:** Placement, Pending Recall, Final Recall, Payment, Demographic, Notes, Misc Extra Data, Equipment, Request/Response, Judgment, Deceased, Bankruptcy, Complaint, Dispute.
- Last Sent:** Recall Objection, Payment, Demographic, Close, Bankruptcy, Deceased, Reconciliation, Request/Response, Acknowledgment, Asset, Judgment, Status/Notes, Activity Notes, Work Efforts.
- Complaint:** [Text Field]
- Dispute:** [Text Field]
- Buttons:** Save, Cancel, Apply.

2. Click the **Process** tab.

[Import Overview](#)

The screenshot shows the 'Client Configuration' window. At the top, there are fields for 'Client Name', 'My Agency Id' (set to 0), and 'AIM Client Version' (set to 8.2*). Below these are checkboxes for 'Using Alpha Code In File Names' and a field for 'My Alpha Code'. The main area is divided into tabs: 'History', 'Status and Notes (ASTS)', 'Payments', 'Final Recall', 'Close Statuses', 'Process', 'General', 'Placement', and 'Pending Recall'. The 'Process' tab is currently selected. Under the 'Process' tab, there are two main sections: 'Export' and 'Import'. The 'Export' section contains buttons for Payments (APAY), Demographics (ADEM), Reconciliation (AREC), Deceases (ADEC), Bankruptcies (ABKP), Assets (AAS), Activity Notes (ANOT), Closes (ACLS), Post Dated Transactions (APDT), Acknowledgments (AACK), Notes (ASTS), Request/Response (ARAR), Judgments (AJDG), Work Effort (AWEF), Complaint (ACPT), and Dispute (ADIS). The 'Import' section contains buttons for Placement (CPLC), Payments (CPAY), Recall (CRCL), Demographics (CDEM), Misc Extra (CMIS), Notes (CNOT), Assets (CAST), Deceases (CDEC), Equipment (CEQP), Request/Response (CRAR), Bankruptcies (CBKP), Judgments (CJDG), Complaint (CCPT), and Dispute (CDIS). Below the 'Import' buttons is a progress bar showing '0 %' and an 'Import File' button. At the bottom right, there are 'Save', 'Cancel', and 'Apply' buttons.

3. In the **Import** section, click **Equipment (CEQP)**. The **Open** dialog box appears.
4. Click the Equipment file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
5. Click **OK**. Data from the file appears in the preview window.
6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
7. Click **OK**.
8. To review any processing errors, click the **History** tab.

Related Topics

[Feedback](#)

Use the **Process** tab in the **Client Configuration**

[Import Overview](#)



Import Judgment Data

window to import judgment data that the client added or updated after placing the accounts with your organization. **To**

import judgment data

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

The screenshot shows the 'Client Configuration' window with the 'General' tab selected. The window has a title bar with 'Client Configuration' and a close button. Below the title bar, there are input fields for 'Client Name', 'My Agency Id' (set to 0), and 'AIM Client Version' (set to 8.2). There is also a checkbox for 'Using Alpha Code In File Names' and a field for 'My Alpha Code'. Below these are three tabs: 'History', 'Status and Notes (ASTS)', and 'Payments'. The 'General' tab is active, showing a form with fields for 'Description' (ABC Agency), 'Contact Name', 'Phone' (555-555-5555), 'Email' (aadams@abcagency.com), and 'Address' (1000 Main St, Jacksonville, FL 32256). Below the form are two columns of dropdown menus. The left column is labeled 'Last Received' and includes: Placement, Pending Recall, Final Recall, Payment, Demographic, Notes, Misc Extra Data, Equipment, Request/Response, Judgment, Deceased, Bankruptcy, Complaint, and Dispute. The right column is labeled 'Last Sent' and includes: Recall Objection, Payment, Demographic, Close, Bankruptcy, Deceased, Reconciliation, Request/Response, Acknowledgment, Asset, Judgment, Status/Notes, Activity Notes, and Work Efforts. At the bottom right are buttons for 'Save', 'Cancel', and 'Apply'.

2. Click the **Process** tab.

The screenshot shows the 'Client Configuration' window. At the top, there are fields for 'Client Name', 'My Agency Id' (set to 0), and 'AIM Client Version' (set to 8.2). Below these are checkboxes for 'Using Alpha Code In File Names' and 'My Alpha Code'. The window has several tabs: 'History', 'Status and Notes (ASTS)', 'Payments', 'Final Recall', 'Close Statuses', 'Process', 'General', 'Placement', and 'Pending Recall'. The 'Process' tab is currently selected. Under the 'Process' tab, there are two main sections: 'Export' and 'Import'. The 'Export' section contains buttons for Payments (APAY), Demographics (ADEM), Reconciliation (AREC), Deceases (ADEC), Bankruptcies (ABKP), Assets (AAS), Activity Notes (ANOT), Closes (ACLS), Post Dated Transactions (APDT), Acknowledgments (AACK), Notes (ASTS), Request/Response (ARAR), Judgments (AJDG), Work Effort (AWEF), Complaint (ACPT), and Dispute (ADIS). The 'Import' section contains buttons for Placement (CPLC), Payments (CPAY), Recall (CRCL), Demographics (CDEM), Misc Extra (CMIS), Notes (CNOT), Assets (CAST), Deceases (CDEC), Equipment (CEQP), Request/Response (CRAR), Bankruptcies (CBKP), Judgments (CJDG), Complaint (CCPT), and Dispute (CDIS). Below the 'Import' section is a progress bar showing 0% and an 'Import File' button. At the bottom right of the window are 'Save', 'Cancel', and 'Apply' buttons.

3. In the **Import** section, click **Judgments (CJDG)**. The **Open** dialog box appears.
4. Click the Judgment file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
5. Click **OK**. Data from the file appears in the preview window.
6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
7. Click **OK**.
8. To review any processing errors, click the **History** tab.

Related Topics

[Feedback](#)

Use the **Process** tab in the **Client Configuration**
[Import Overview](#)



Import Miscellaneous Extra Data

window to import miscellaneous extra data that the client added or updated after placing the accounts with your organization. **To import miscellaneous extra data**

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

Client Configuration

Client Name

My Agency Id

0

AIM Client Version

8.2

☐ Using Alpha Code In File Names

My Alpha Code

History

Status and Notes (ASTS)

Payments

Final Recall

Close Statuses

Process

General

Placement

Pending Recall

Description

ABC Agency

Contact Name

Phone

555-555-5555

Email

aadams@ebcagency.com

Address

1000 Main St.
Jacksonville, FL 32256

Last Received

Placement

Pending Recall

Final Recall

Payment

Demographic

Notes

Misc Extra Data

Equipment

Request/Response

Judgment

Deceased

Bankruptcy

Complaint

Dispute

Last Sent

Recall Objection

Payment

Demographic

Close

Bankruptcy

Deceased

Reconciliation

Request/Response

Acknowledgment

Asset

Judgment

Status/Notes

Activity Notes

Work Efforts

Complaint

Dispute

Save

Cancel

Apply

2. Click the **Process** tab.

The screenshot shows the 'Client Configuration' window. At the top, there are fields for 'Client Name', 'My Agency Id' (set to 0), and 'AIM Client Version' (set to 8.2). Below these are checkboxes for 'Using Alpha Code In File Names' and 'My Alpha Code'. The window has several tabs: 'History', 'Status and Notes (ASTS)', 'Payments', 'Final Recall', 'Close Statuses', 'Process', 'General', 'Placement', and 'Pending Recall'. The 'Process' tab is currently selected. Under the 'Process' tab, there are two main sections: 'Export' and 'Import'. The 'Export' section contains buttons for Payments (APAY), Demographics (ADEM), Reconciliation (AREC), Deceases (ADEC), Bankruptcies (ABKP), Assets (AAS), Activity Notes (ANOT), Closes (ACLS), Post Dated Transactions (APDT), Acknowledgments (AACK), Notes (ASTS), Request/Response (ARAR), Judgments (AJDG), Work Effort (AWEF), Complaint (ACPT), and Dispute (ADIS). The 'Import' section contains buttons for Placement (CPLC), Payments (CPAY), Recall (CRCL), Demographics (CDEM), Misc Extra (CMIS), Notes (CNOT), Assets (CAST), Deceases (CDEC), Equipment (CEQP), Request/Response (CRAR), Bankruptcies (CBKP), Judgments (CJDG), Complaint (CCPT), and Dispute (CDIS). Below the 'Import' section is a progress bar showing 0% and an 'Import File' button. At the bottom right of the window are 'Save', 'Cancel', and 'Apply' buttons.

3. In the **Import** section, click **Misc Extra (CMIS)**. The **Open** dialog box appears.
4. Click the Miscellaneous Extra Data file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
5. Click **OK**. Data from the file appears in the preview window.
6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
7. Click **OK**.
8. To review any processing errors, click the **History** tab.

Related Topics

[Feedback](#)

Use the **Process** tab in the **Client Configuration**

[Import Overview](#)



Import Payments

window to import payments that the client added or updated after placing the accounts with your organization. **To**

import payments

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

The screenshot shows the 'Client Configuration' window with the 'General' tab selected. The window has a title bar with 'Client Configuration' and a close button. Below the title bar, there are fields for 'Client Name', 'My Agency Id' (set to 0), and 'AIM Client Version' (set to 8.2). There is also a checkbox for 'Using Alpha Code In File Names' and a field for 'My Alpha Code'. The main area is divided into three sections: 'History' (with 'Final Recall'), 'Status and Notes (ASTS)' (with 'Close Statuses' and 'Placement'), and 'Payments' (with 'Process' and 'Pending Recall'). The 'General' tab is active, showing fields for 'Description' (ABC Agency), 'Contact Name', 'Phone' (555-555-5555), 'Email' (aadams@abcagency.com), and 'Address' (1000 Main St, Jacksonville, FL 32256). Below these are two columns of dropdown menus for 'Last Received' and 'Last Sent' categories, including 'Placement', 'Pending Recall', 'Final Recall', 'Payment', 'Demographic', 'Notes', 'Misc Extra Data', 'Equipment', 'Request/Response', 'Judgment', 'Deceased', 'Bankruptcy', 'Complaint', 'Dispute', 'Recall Objection', 'Payment', 'Demographic', 'Close', 'Bankruptcy', 'Deceased', 'Reconciliation', 'Request/Response', 'Acknowledgment', 'Asset', 'Judgment', 'Status/Notes', 'Activity Notes', and 'Work Efforts'. At the bottom right are 'Save', 'Cancel', and 'Apply' buttons.

2. Click the **Process** tab.

The screenshot shows the 'Client Configuration' window. At the top, there are fields for 'Client Name', 'My Agency Id' (set to 0), and 'AIM Client Version' (set to 8.2). Below these are checkboxes for 'Using Alpha Code In File Names' and 'My Alpha Code'. The window has several tabs: 'History', 'Status and Notes (ASTS)', 'Payments', 'Final Recall', 'Close Statuses', 'Process', 'General', 'Placement', and 'Pending Recall'. The 'Process' tab is currently selected. Under the 'Process' tab, there are two main sections: 'Export' and 'Import'. The 'Export' section contains buttons for Payments (APAY), Demographics (ADEM), Reconciliation (AREC), Deceases (ADEC), Bankruptcies (ABKP), Assets (AAS), Activity Notes (ANOT), Closes (ACLS), Post Dated Transactions (APDT), Acknowledgments (AACK), Notes (ASTS), Request/Response (ARAR), Judgments (AJDG), Work Effort (AWEF), Complaint (ACPT), and Dispute (ADIS). The 'Import' section contains buttons for Placement (CPLC), Payments (CPAY), Recall (CRCL), Demographics (CDEM), Misc Extra (CMIS), Notes (CNOT), Assets (CAST), Deceases (CDEC), Equipment (CEQP), Request/Response (CRAR), Bankruptcies (CBKP), Judgments (CJDG), Complaint (CCPT), and Dispute (CDIS). Below the 'Import' section is a progress bar showing 0% and an 'Import File' button. At the bottom right of the window are 'Save', 'Cancel', and 'Apply' buttons.

3. In the **Import** section, click **Payments (CPAY)**. The **Open** dialog box appears.
4. Click the Payment file to import and then click **Open**. A notification dialog box appears, which shows the number of records and total payments in the file.
5. Click **OK**. Data from the file appears in the preview window.
6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
7. Click **OK**.
8. To review any processing errors, click the **History** tab.

Related Topics

[Feedback](#)

Use the **Process** tab in the **Client Configuration**

[Import Overview](#)



Import Requests and Responses

requests from the client.

window to import account placement and recall

To import requests and responses

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

The screenshot shows the 'Client Configuration' window with the 'General' tab selected. The window has a title bar with 'Client Configuration' and a close button. Below the title bar, there are fields for 'Client Name', 'My Agency Id' (set to 0), and 'AIM Client Version' (set to 8.2). There is also a checkbox for 'Using Alpha Code In File Names' and a field for 'My Alpha Code'. The main area is divided into three sections: 'History' (with 'Final Recall'), 'Status and Notes (ASTS)' (with 'Close Statuses' and 'Placement'), and 'Payments' (with 'Process' and 'Pending Recall'). Below these, there are input fields for 'Description' (ABC Agency), 'Contact Name', 'Phone' (555-555-5555), 'Email' (aadam@abcagency.com), and 'Address' (1000 Main St, Jacksonville, FL 32256). At the bottom, there are two columns of dropdown menus for 'Last Received' and 'Last Sent' categories, including 'Placement', 'Pending Recall', 'Final Recall', 'Payment', 'Demographic', 'Notes', 'Misc Extra Data', 'Equipment', 'Request/Response', 'Judgment', 'Deceased', 'Bankruptcy', 'Complaint', 'Dispute', 'Recall Objection', 'Payment', 'Demographic', 'Close', 'Bankruptcy', 'Deceased', 'Reconciliation', 'Request/Response', 'Acknowledgment', 'Asset', 'Judgment', 'Status/Notes', 'Activity Notes', and 'Work Efforts'. There are also dropdowns for 'Complaint' and 'Dispute'. At the bottom right, there are 'Save', 'Cancel', and 'Apply' buttons.

2. Click the **Process** tab.

The screenshot shows the 'Client Configuration' window with the 'Process' tab selected. The 'Import' section is active, displaying a grid of buttons for various data types: Payments (CPAY), Recall (CRCL), Demographics (CDEM), Misc Extra (CMIS), Notes (CNOT), Assets (CAST), Deceases (CDEC), Equipment (CEQP), Request/Response (CRAR), Bankruptcies (CBKP), Judgments (CJDG), Complaint (CCPT), and Dispute (CDIS). A progress bar at the bottom of the import section shows 0% completion. The 'Import File' button is visible at the bottom right of the import section. The window also includes fields for Client Name, My Agency Id, My Alpha Code, and AIM Client Version, along with a 'Using Alpha Code In File Names' checkbox. The bottom of the window has 'Save', 'Cancel', and 'Apply' buttons.

3. In the **Import** section, click **Request/Response (CRAR)**. The **Open** dialog box appears.
4. Click the Request/Response file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
5. Click **OK**. Data from the file appears in the preview window.
6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
7. Click **OK**.
8. To review any processing errors, click the **History** tab.

Related Topics

[Import Overview](#)

Export Overview



[Feedback](#)

Export Overview

You have two options for exporting data from AIM Receiver. The first option is to export data for one or more clients for a specific type of data (for example, payments, recalls, notes). The second option is to export data for a specific client and type of data. Your client imports the exported data into AIM and

AIM updates the account information in Latitude.

Related Topics

[Export Data for Multiple Clients](#)

[Export Acknowledgments for Multiple Clients](#)

[Export Payments for Multiple Clients](#)

[Export Account Closings](#)

[Export Account Notes](#)

[Export Acknowledgments](#)

[Export Assets](#)

[Export Bankruptcy Data](#)

[Export Complaints](#)

[Export Deceased Debtor Data](#)

[Export Demographic Data](#)

[Export Disputes](#)

[Export Judgment Data](#)

[Export Payments](#)


[Export Post-Dated Transactions](#)
[Export Reconciliation Data](#)
[Export Requests and Responses](#)
[Export Status Notes](#)
[Export Work Effort](#)
[Feedback](#)

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Export Data for Multiple Clients

Use the **Export** option in the **Actions** menu to export account updates for a specific type of data for clients that placed accounts with your organization. Data types include bankruptcy, account closings, deceased debtor, demographics, notes, post-dated transactions, and reconciliation. For information about exporting acknowledgments or payments, see [Export Acknowledgments for One or More Clients](#) or [Export Payments for One or More Clients](#). **To export data for multiple clients**

1. In the menu bar, click **Actions** > **Export** > and then click the type of data to export. The **Browse for Folder** dialog box appears.
2. Click the folder to export the files to and then click **OK**. The **Client Selector** dialog box appears.

Client Selector

☒ All Receiver Clients
☐ Selected Receiver Clients (highlighted rows)

Drag a column header here to group by that column.

clientid	Name	Description	AlphaCod	AgencyI
6	ABC Company			2
4	Summer Collect		A10	10
5	Winter Collectio	Winter Collection Ag		0

OK Cancel

3. Do one of the following:
 - To export data for all clients, click **All Receiver Clients**.
 - To export data for specific clients, click **Selected Receiver Clients** and then click the clients to include in the export file.

Tip: To select multiple sequential clients, press and hold the **Shift** key and then click the first and last sequential client. To select multiple non-sequential clients, press and hold the **Ctrl** key and then click each client.

4. Click **OK**. A notification dialog box appears.
5. Click **OK**.

Related Topics

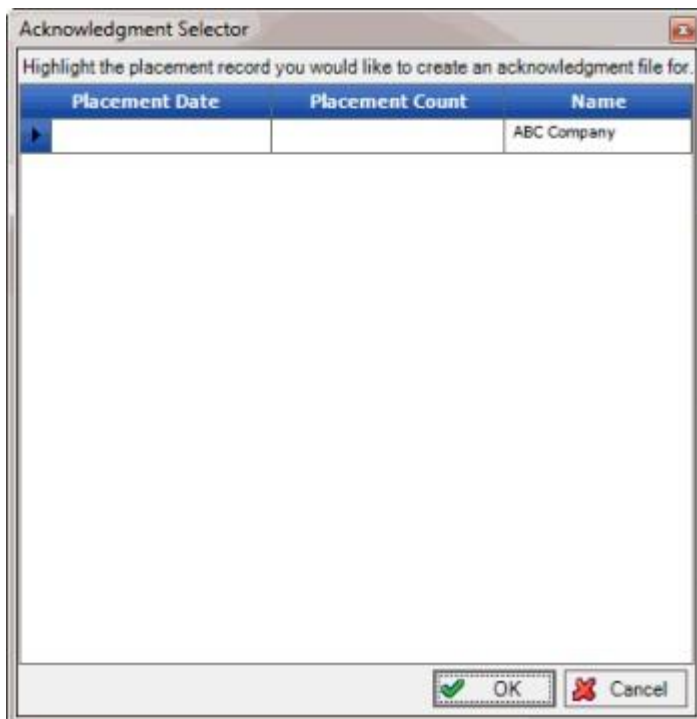
[Export Overview](#)



Export Acknowledgments for Multiple Clients

Use the **Export** option in the **Actions** menu to export acknowledgments indicating that your organization received data for the accounts that clients placed with your organization. **To export acknowledgments for multiple clients**

1. In the menu bar, click **Actions > Export > Acknowledgments**. The **Browse for Folder** dialog box appears.
2. Click the folder to export the files to and then click **OK**. The **Acknowledgment Selector** dialog box appears.



3. Click the account placements to acknowledge.

Tip: To select multiple sequential placements, press and hold the **Shift** key and then click the first and last sequential placement. To select multiple non-sequential placements, press and hold the **Ctrl** key and then click each placement.

4. Click **OK**. A notification dialog box appears.
5. Click **OK**.

Related Topics

[Export Overview](#)

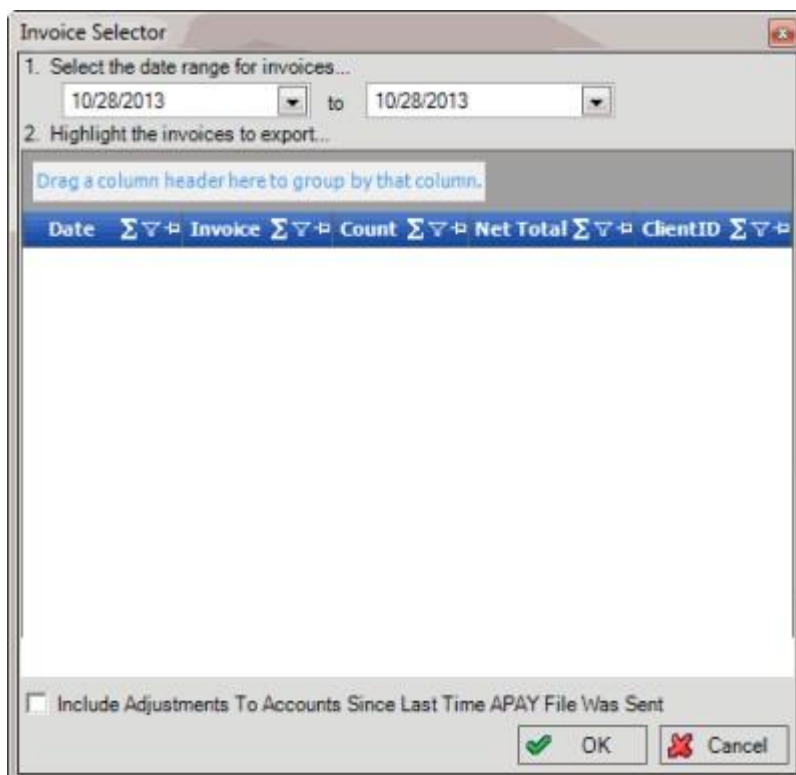


Export Payments for Multiple Clients

Use the **Export** option in the **Actions** menu to export payments and adjustments that your organization received for accounts that clients placed with your organization.

To export payments for multiple clients

1. In the menu bar, click **Actions** > **Export** > **Payments**. The **Browse for Folder** dialog box appears.
2. Click the folder to export the files to and then click **OK**. The **Invoice Selector** dialog box appears.



3. Specify the date range for the invoices to include in the export file. The dialog box displays all invoices that your organization generated during the specified date range.
4. Click the invoices to include in the export file. The **Net Total** signifies the total payments and reversals combined.

Tip: To select multiple sequential invoices, press and hold the **Shift** key and then click the first and last sequential invoice. To select multiple non-sequential invoices, press and hold the **Ctrl** key and then click each invoice.

5. To include invoiced DA (decreasing adjustment) or DAR (decreasing adjustment reversal) transactions in the export file, select the **Include Adjustments to Accounts Since Last Time APAY File Was Sent** check box.
6. Click **OK**. The **Save As** dialog box appears.
7. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
8. Click **OK**.

Related Topics

[Export Overview](#)



[Feedback](#)

Export Account Closings

Use the **Process** tab in the **Client Configuration** window to export data for accounts that your organization has closed for the client. You cannot export account closings without assigning the number of hold days. For more information, see [Configure Close Status Codes](#). **To export account closings**

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

AIM Receiver Manager Printable Help

Client Configuration

Client Name: My Agency Id: AIM Client Version: 8.2.*
☐ Using Alpha Code In File Names My Alpha Code:

History: Final Recall | Status and Notes (ASTS): Close Statuses | Payments: Process
General: Placement | Pending Recall

Description: ABC Agency
Contact Name:
Phone: 555-555-5555
Email: aadams@abcagency.com
Address: 1000 Main St
Jacksonville, FL 32256

Last Received	Last Sent	Complaint
Placement	Recall Objection	
Pending Recall	Payment	Dispute
Final Recall	Demographic	
Payment	Close	
Demographic	Bankruptcy	
Notes	Deceased	
Misc Extra Data	Reconciliation	
Equipment	Request/Response	
Request/Response	Acknowledgment	
Judgment	Asset	
Deceased	Judgment	
Bankruptcy	Status/Notes	
Complaint	Activity Notes	
Dispute	Work Efforts	

Save Cancel Apply

2. Click the **Process** tab.

The screenshot shows the 'Client Configuration' window. At the top, there are fields for 'Client Name', 'My Agency Id' (set to 0), and 'AIM Client Version' (set to 8.2). Below these is a checkbox for 'Using Alpha Code In File Names' and a field for 'My Alpha Code'. The window has several tabs: 'History', 'Status and Notes (ASTS)', 'Payments', 'Final Recall', 'Close Statuses', 'Process', 'General', 'Placement', and 'Pending Recall'. The 'Process' tab is selected. Under the 'Export' section, there are buttons for: Payments (APAY), Demographics (ADEM), Reconciliation (AREC), Deceases (ADEC), Bankruptcies (ABKP), Assets (AAS), Activity Notes (ANOT), Closes (ACLS), Post Dated Transactions (APDT), Acknowledgments (AACK), Notes (ASTS), Request/Response (ARAR), Judgments (AJDG), Work Effort (AWEF), Complaint (ACPT), and Dispute (ADIS). The 'Closes (ACLS)' button is highlighted. Below the 'Export' section is an 'Import' section with buttons for: Placement (CPLC), Payments (CPAY), Recall (CRCL), Demographics (CDEM), Misc Extra (CMIS), Notes (CNOT), Assets (CAST), Deceases (CDEC), Equipment (CEQP), Request/Response (CRAR), Bankruptcies (CBKP), Judgments (CJDG), Complaint (CCPT), and Dispute (CDIS). At the bottom of the 'Import' section is a progress bar showing 0% and an 'Import File' button. At the very bottom of the window are 'Save', 'Cancel', and 'Apply' buttons.

3. In the **Export** section, click **Closes (ACLS)**. The **Save As** dialog box appears.
4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
5. Click **OK**.

Related Topics

[Export Overview](#)



Export Account Notes

Use the **Process** tab in the **Client Configuration** window to export notes that your organization added or updated for accounts that the client placed with your organization.

To export account notes

AIM Receiver Manager

AIM Receiver Manager Printable Help

Client Configuration

Client Name My Agency Id AIM Client Version
☐ Using Alpha Code In File Names My Alpha Code

History Status and Notes (ASTS) Payments
Final Recall Close Statuses Process
General Placement Pending Recall

Description
Contact Name
Phone
Email
Address

Last Received
Placement
Pending Recall
Final Recall
Payment
Demographic
Notes
Misc Extra Data
Equipment
Request/Response
Judgment
Deceased
Bankruptcy
Complaint
Dispute

Last Sent
Recall Objection
Payment
Demographic
Close
Bankruptcy
Deceased
Reconciliation
Request/Response
Acknowledgment
Asset
Judgment
Status/Notes
Activity Notes
Work Efforts

Complaint
Dispute

Save Cancel Apply

2. Click the **Process** tab.

1. In the window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

The screenshot shows the 'Client Configuration' window. At the top, there are fields for 'Client Name', 'My Agency Id' (set to 0), and 'AIM Client Version' (set to 8.2). Below these is a checkbox for 'Using Alpha Code In File Names' and a field for 'My Alpha Code'. The window has several tabs: 'History', 'Status and Notes (ASTS)', 'Payments', 'Final Recall', 'Close Statuses', 'Process', 'General', 'Placement', and 'Pending Recall'. The 'Process' tab is currently selected. Under the 'Export' section, there are buttons for: Payments (APAY), Demographics (ADEM), Reconciliation (AREC), Deceases (ADEC), Bankruptcies (ABKP), Assets (AAS), Activity Notes (ANOT), Closes (ACLS), Post Dated Transactions (APDT), Acknowledgments (AACK), Notes (ASTS), Request/Response (ARAR), Judgments (AJDG), Work Effort (AWEF), Complaint (ACPT), and Dispute (ADIS). The 'Notes (ANOT)' button is highlighted. Below the 'Export' section is an 'Import' section with buttons for: Placement (CPLC), Payments (CPAY), Recall (CRCL), Demographics (CDEM), Misc Extra (CMIS), Notes (CNOT), Assets (CAST), Deceases (CDEC), Equipment (CEQP), Request/Response (CRAR), Bankruptcies (CBKP), Judgments (CJDG), Complaint (CCPT), and Dispute (CDIS). At the bottom of the 'Import' section is a progress bar showing 0% and an 'Import File' button. At the very bottom of the window are 'Save', 'Cancel', and 'Apply' buttons.

3. In the **Export** section, click **Notes (ANOT)**. The **Save As** dialog box appears.
4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
5. Click **OK**.

Related Topics

[Export Overview](#)



Export Acknowledgments

Use the **Process** tab in the **Client Configuration** window to export acknowledgments indicating that your organization received data for the accounts that the client placed with your organization.

To export acknowledgments

AIM Receiver Manager

AIM Receiver Manager Printable Help

Client Configuration

Client Name My Agency Id AIM Client Version

☐ Using Alpha Code In File Names My Alpha Code

History Final Recall General Status and Notes (ASTS) Close Statuses Placement Payments Process Pending Recall

Description ABC Agency

Contact Name

Phone 555-555-5555

Email aadam@abcagency.com

Address 1000 Main St
Jacksonville, FL 32256

Last Received Placement Pending Recall Final Recall Payment Demographic Notes Misc Extra Data Equipment Request/Response Judgment Deceased Bankruptcy Complaint Dispute

Last Sent Recall Objection Payment Demographic Close Bankruptcy Deceased Reconciliation Request/Response Acknowledgment Asset Judgment Status/Notes Activity Notes Work Efforts

Complaint

Dispute

Save Cancel Apply

2. Click the **Process** tab.

1. In the window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

The screenshot shows the 'Client Configuration' window. At the top, there are fields for 'Client Name', 'My Agency Id' (set to 0), and 'AIM Client Version' (set to 8.2). Below these is a checkbox for 'Using Alpha Code In File Names' and a field for 'My Alpha Code'. The window has several tabs: 'History', 'Status and Notes (ASTS)', 'Payments', 'Final Recall', 'Close Statuses', 'Process', 'General', 'Placement', and 'Pending Recall'. The 'Process' tab is currently selected. Under the 'Export' section, there are buttons for: Payments (APAY), Demographics (ADEM), Reconciliation (AREC), Deceases (ADEC), Bankruptcies (ABKP), Assets (AAS), Activity Notes (ANOT), Closes (ACLS), Post Dated Transactions (APDT), Acknowledgments (AACK), Notes (ASTS), Request/Response (ARAR), Judgments (AJDG), Work Effort (AWEF), Complaint (ACPT), and Dispute (ADIS). The 'Acknowledgments (AACK)' button is highlighted. Below the 'Export' section is an 'Import' section with buttons for: Placement (CPLC), Payments (CPAY), Recall (CRCL), Demographics (CDEM), Misc Extra (CMIS), Notes (CNOT), Assets (CAST), Deceases (CDEC), Equipment (CEQP), Request/Response (CRAR), Bankruptcies (CBKP), Judgments (CJDG), Complaint (CCPT), and Dispute (CDIS). At the bottom of the 'Import' section is a progress bar showing '0 %' and an 'Import File' button. At the very bottom of the window are 'Save', 'Cancel', and 'Apply' buttons.

3. In the **Export** section, click **Acknowledgments (AACK)**. The **Save As** dialog box appears.
4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
5. Click **OK**.

Related Topics

[Export Overview](#)



Export Assets

Use the **Process** tab in the **Client Configuration** window to export assets that your organization added or updated for accounts that the client placed with your organization.

To export assets

AIM Receiver Manager

Client Configuration

Client Name My Agency Id AIM Client Version
☐ Using Alpha Code In File Names My Alpha Code

History Status and Notes (ASTS) Payments
 Final Recall Close Statuses Process
General Placement Pending Recall

Description
 Contact Name
 Phone
 Email
 Address

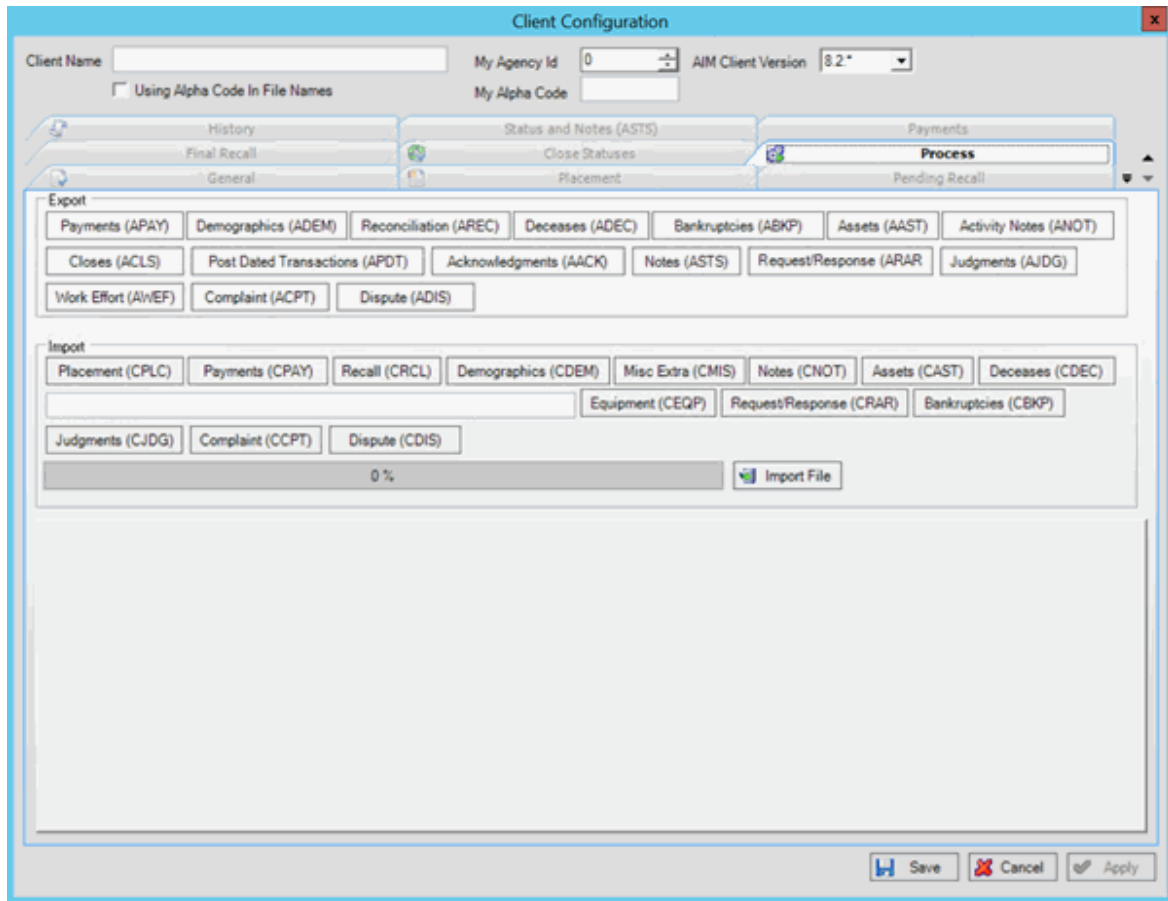
Last Received
 Placement
 Pending Recall
 Final Recall
 Payment
 Demographic
 Notes
 Misc Extra Data
 Equipment
 Request/Response
 Judgment
 Deceased
 Bankruptcy
 Complaint
 Dispute

Last Sent
 Recall Objection
 Payment
 Demographic
 Close
 Bankruptcy
 Deceased
 Reconciliation
 Request/Response
 Acknowledgment
 Asset
 Judgment
 Status/Notes
 Activity Notes
 Work Efforts

Complaint
 Dispute

2. Click the **Process** tab.

1. In the window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.



3. In the **Export** section, click **Assets (AAS)**. The **Save As** dialog box appears.
4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
5. Click **OK**.

Related Topics

[Export Overview](#)



Export Bankruptcy Data

Use the **Process** tab in the **Client Configuration** window to export bankruptcy data that your organization added or updated for accounts that the client placed with your organization.

To export bankruptcy data

1. In the
icon. The **Client Configuration** window appears, with the **General** tab selected.

AIM Receiver Manager window, in the Name column of the data grid, click the Client

Client Configuration

Client Name My Agency Id AIM Client Version
☐ Using Alpha Code In File Names My Alpha Code

History Status and Notes (ASTS) Payments
Final Recall Close Statuses Process
General Placement Pending Recall

Description
Contact Name
Phone
Email
Address

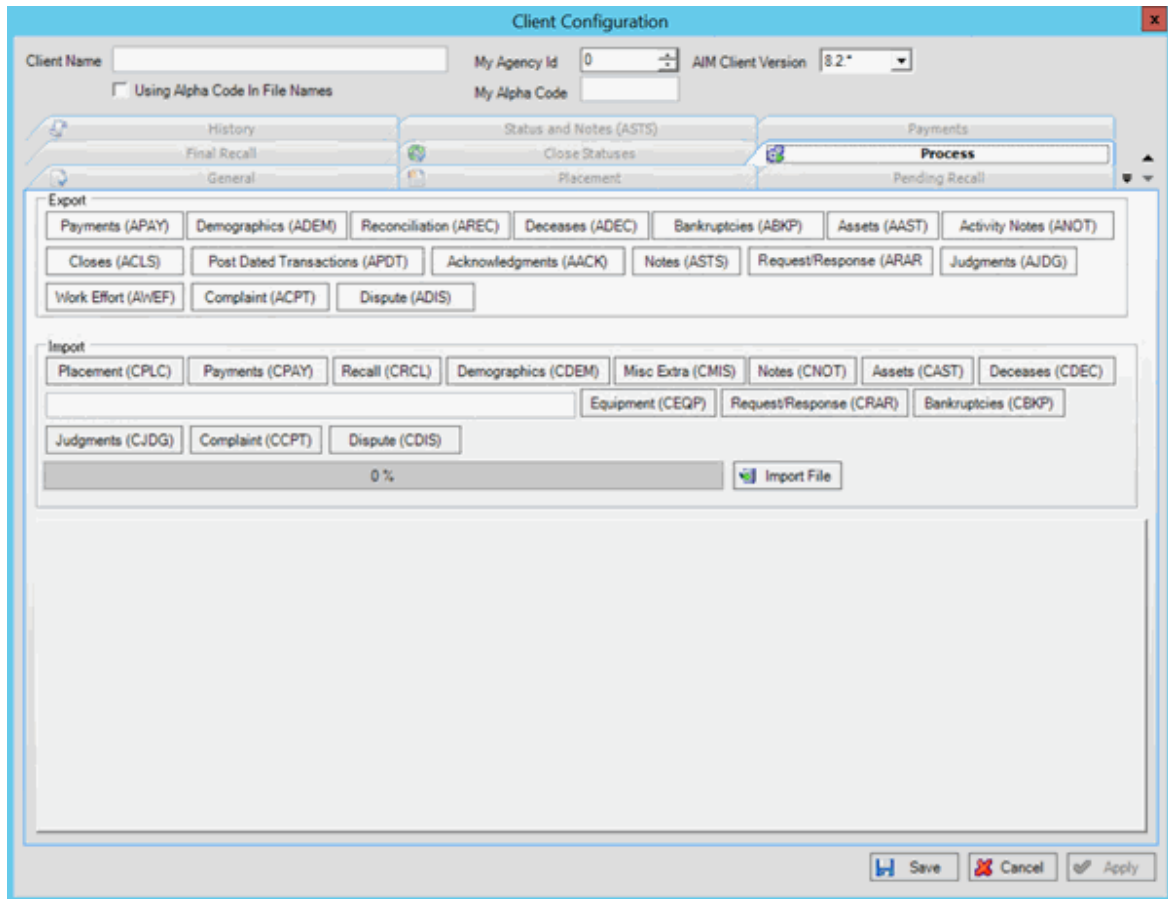
Last Received
Placement
Pending Recall
Final Recall
Payment
Demographic
Notes
Misc Extra Data
Equipment
Request/Response
Judgment
Deceased
Bankruptcy
Complaint
Dispute

Last Sent
Recall Objection
Payment
Demographic
Close
Bankruptcy
Deceased
Reconciliation
Request/Response
Acknowledgment
Asset
Judgment
Status/Notes
Activity Notes
Work Efforts

Complaint
Dispute

Save Cancel Apply

2. Click the **Process** tab.



3. In the **Export** section, click **Bankruptcies (ABKP)**. The **Save As** dialog box appears.
4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
5. Click **OK**.

Related Topics

[Export Overview](#)



Export Complaints

Use the **Process** tab in the **Client Configuration** window to export complaints that your organization added or updated for accounts that the client placed with your organization.

Note: The complaints export feature is not available for AIM Receiver versions earlier than version 12.0.

To export complaints

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

AIM Receiver Manager Printable Help

Client Configuration

Client Name My Agency Id AIM Client Version 8.2.*

☐ Using Alpha Code In File Names My Alpha Code

History Status and Notes (ASTS) Payments
Final Recall Close Statuses Process
General Placement Pending Recall

Description ABC Agency

Contact Name

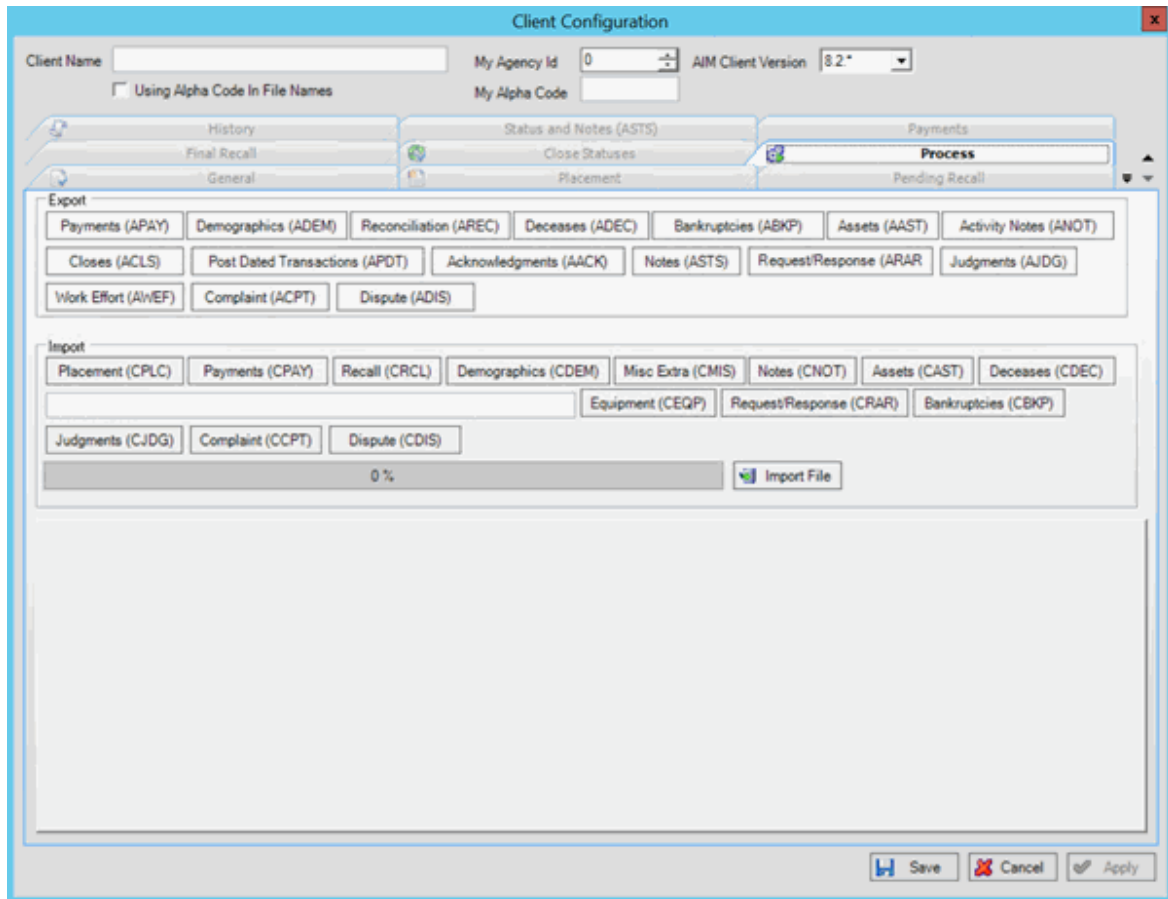
Phone 555-555-5555

Email aadams@abcagency.com

Address 1000 Main St
Jacksonville, FL 32256

Last Received	<input type="text"/>	Last Sent	<input type="text"/>	Complaint	<input type="text"/>
Placement	<input type="text"/>	Recall Objection	<input type="text"/>	Dispute	<input type="text"/>
Pending Recall	<input type="text"/>	Payment	<input type="text"/>		
Final Recall	<input type="text"/>	Demographic	<input type="text"/>		
Payment	<input type="text"/>	Close	<input type="text"/>		
Demographic	<input type="text"/>	Bankruptcy	<input type="text"/>		
Notes	<input type="text"/>	Deceased	<input type="text"/>		
Misc Extra Data	<input type="text"/>	Reconciliation	<input type="text"/>		
Equipment	<input type="text"/>	Request/Response	<input type="text"/>		
Request/Response	<input type="text"/>	Acknowledgment	<input type="text"/>		
Judgment	<input type="text"/>	Asset	<input type="text"/>		
Deceased	<input type="text"/>	Judgment	<input type="text"/>		
Bankruptcy	<input type="text"/>	Status/Notes	<input type="text"/>		
Complaint	<input type="text"/>	Activity Notes	<input type="text"/>		
Dispute	<input type="text"/>	Work Efforts	<input type="text"/>		

2. Click the **Process** tab.



3. In the **Export** section, click **Complaint (ACPT)**. The **Save As** dialog box appears.
4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
5. Click **OK**.

Related Topics

[Export Overview](#)



Export Deceased Debtor Data

Use the **Process** tab in the **Client Configuration** window to export data for debtors who became deceased after the client placed the accounts with your organization. The export file only includes accounts with an open status.

To export deceased debtor data

AIM Receiver Manager Printable Help

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

Client Configuration

Client Name My Agency Id AIM Client Version

☐ Using Alpha Code In File Names My Alpha Code

History Status and Notes (ASTS) Payments

Final Recall Close Statuses Process

General Placement Pending Recall

Description

Contact Name

Phone

Email

Address

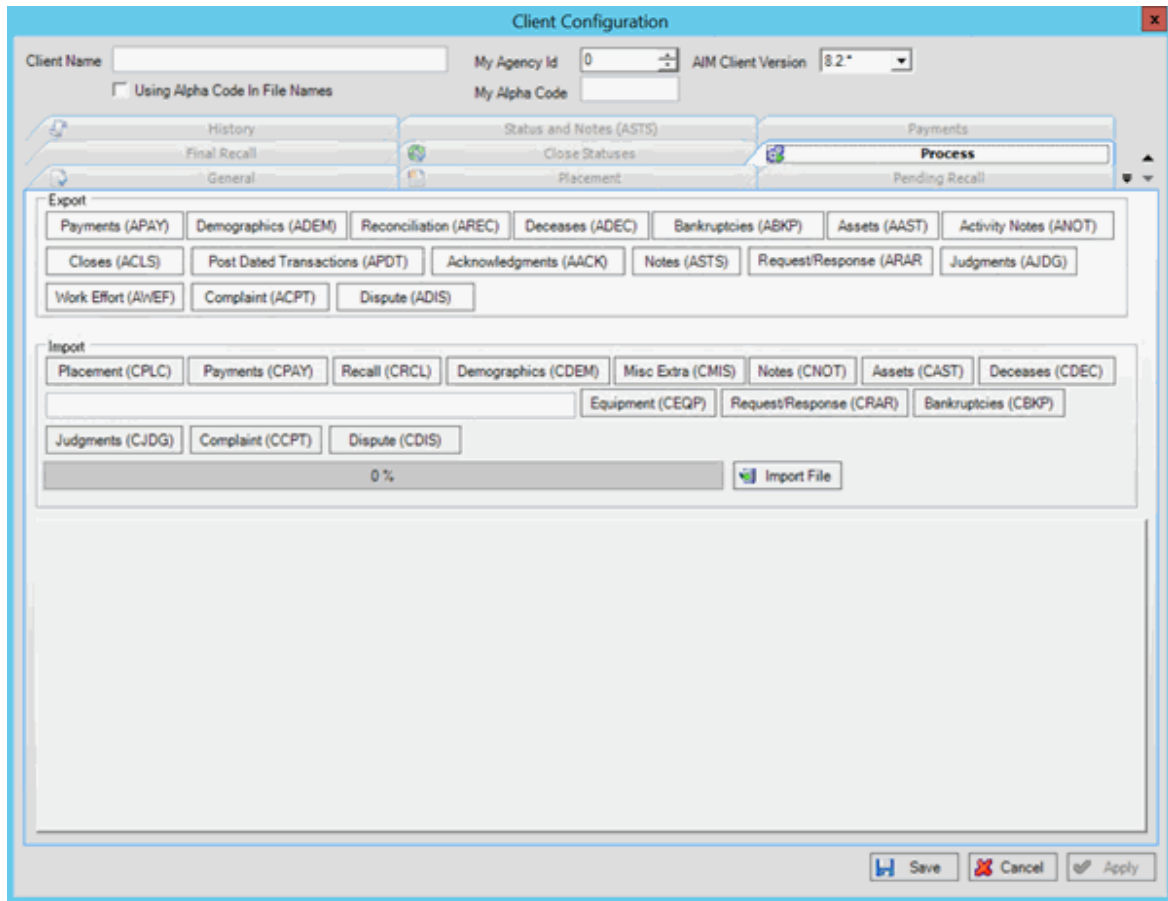
Last Received Placement Pending Recall Final Recall Payment Demographic Notes Misc Extra Data Equipment Request/Response Judgment Deceased Bankruptcy Complaint Dispute

Last Sent Recall Objection Payment Demographic Close Bankruptcy Deceased Reconciliation Request/Response Acknowledgment Asset Judgment Status/Notes Activity Notes Work Efforts

Complaint Dispute

Save Cancel Apply

2. Click the **Process** tab.



3. In the **Export** section, click **Deceases (ADEC)**. The **Save As** dialog box appears.
4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
5. Click **OK**.

Related Topics

[Export Overview](#)



Export Demographic Data

Use the **Process** tab in the **Client Configuration** window to export phones, phone consent, and addresses that your organization added or updated for accounts that the client placed with your organization.

To export demographic data

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

AIM Receiver Manager Printable Help

Client Configuration

Client Name My Agency Id AIM Client Version

☐ Using Alpha Code In File Names My Alpha Code

History Status and Notes (ASTS) Payments
Final Recall Close Statuses Process
General Placement Pending Recall

Description

Contact Name

Phone

Email

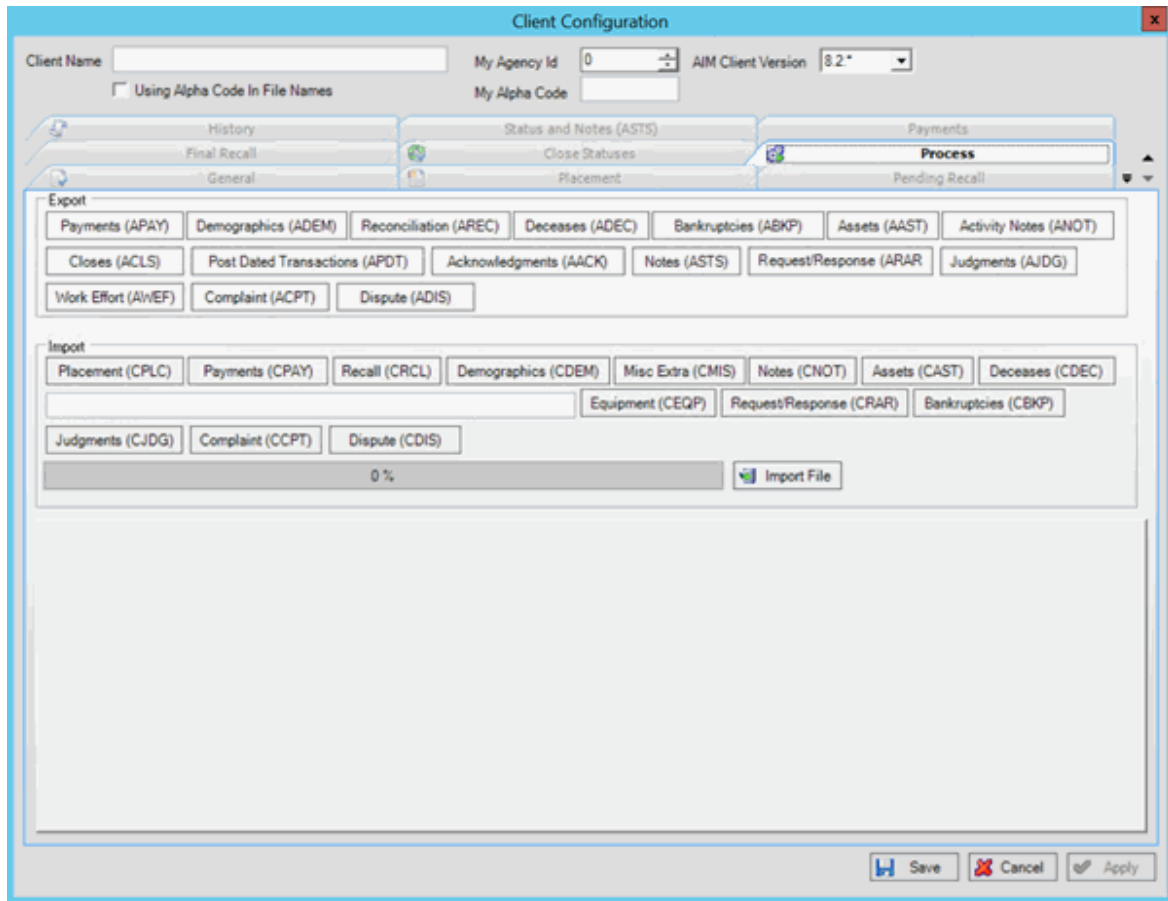
Address

Last Received
Placement
Pending Recall
Final Recall
Payment
Demographic
Notes
Misc Extra Data
Equipment
Request/Response
Judgment
Deceased
Bankruptcy
Complaint
Dispute

Last Sent
Recall Objection
Payment
Demographic
Close
Bankruptcy
Deceased
Reconciliation
Request/Response
Acknowledgment
Asset
Judgment
Status/Notes
Activity Notes
Work Efforts

Complaint
Dispute

2. Click the **Process** tab.



3. In the **Export** section, click **Demographics (ADEM)**. The **Save As** dialog box appears.
4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
5. Click **OK**.

Related Topics

[Export Overview](#)



Export Disputes

Use the **Process** tab in the **Client Configuration** window to export disputes that your organization added or updated for accounts that the client placed with your organization.

Note: The disputes export feature is not available for AIM Receiver versions earlier than version 12.0.

To export disputes

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

AIM Receiver Manager Printable Help

Client Configuration

Client Name My Agency Id AIM Client Version

☐ Using Alpha Code In File Names My Alpha Code

History Status and Notes (ASTS) Payments

Final Recall Close Statuses Process

General Placement Pending Recall

Description

Contact Name

Phone

Email

Address

Last Received Last Sent

Placement Recall Objection Complaint

Pending Recall Payment Dispute

Final Recall Demographic

Payment Close

Demographic Bankruptcy

Notes Deceased

Misc Extra Data Reconciliation

Equipment Request/Response

Request/Response Acknowledgment

Judgment Asset

Deceased Judgment

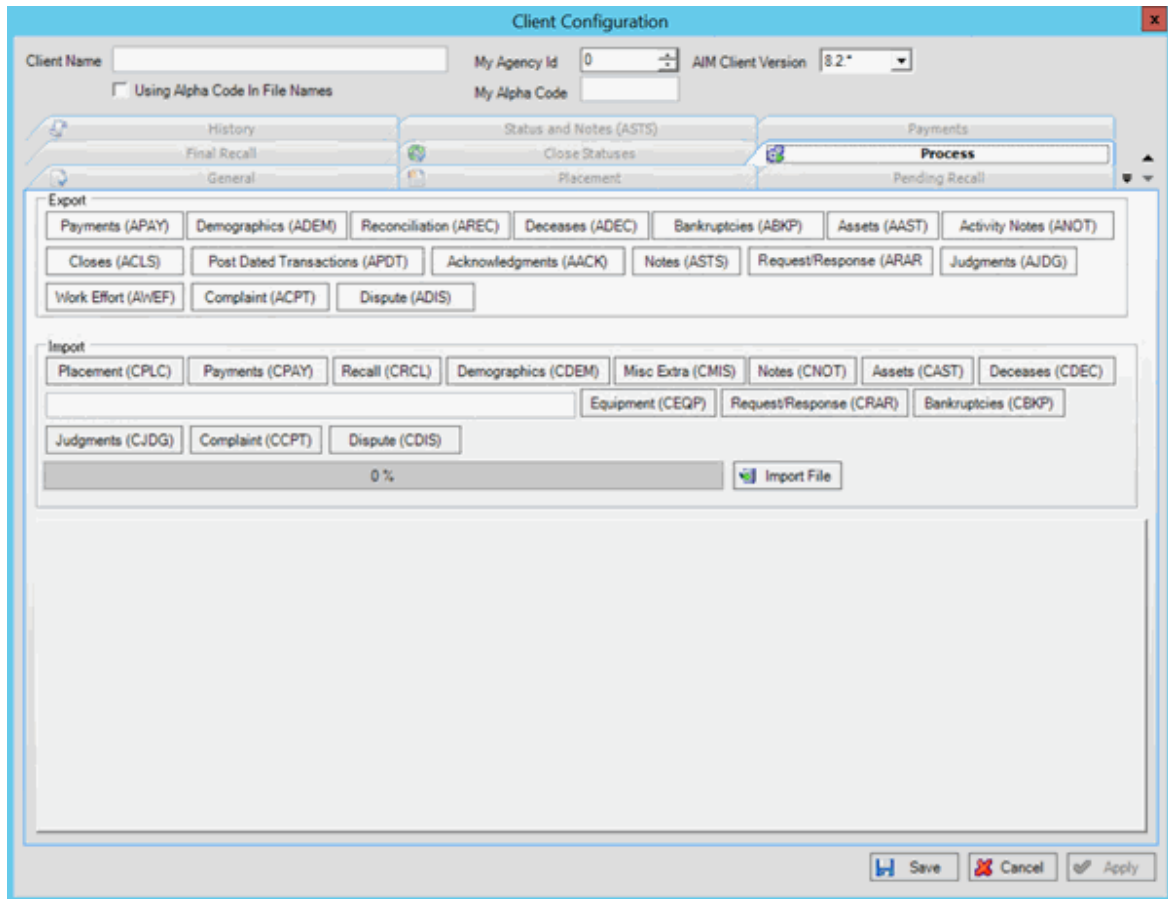
Bankruptcy Status/Notes

Complaint Activity Notes

Dispute Work Efforts

Save Cancel Apply

2. Click the **Process** tab.



3. In the **Export** section, click **Dispute (ADIS)**. The **Save As** dialog box appears.
4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
5. Click **OK**.

Related Topics

[Export Overview](#)



Export Judgment Data

Use the **Process** tab in the **Client Configuration** window to export judgment data that your organization added or updated for accounts that the client placed with your organization. **To export judgment data**

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

AIM Receiver Manager Printable Help

Client Configuration

Client Name: My Agency Id: AIM Client Version: 8.2.*
☐ Using Alpha Code In File Names My Alpha Code:

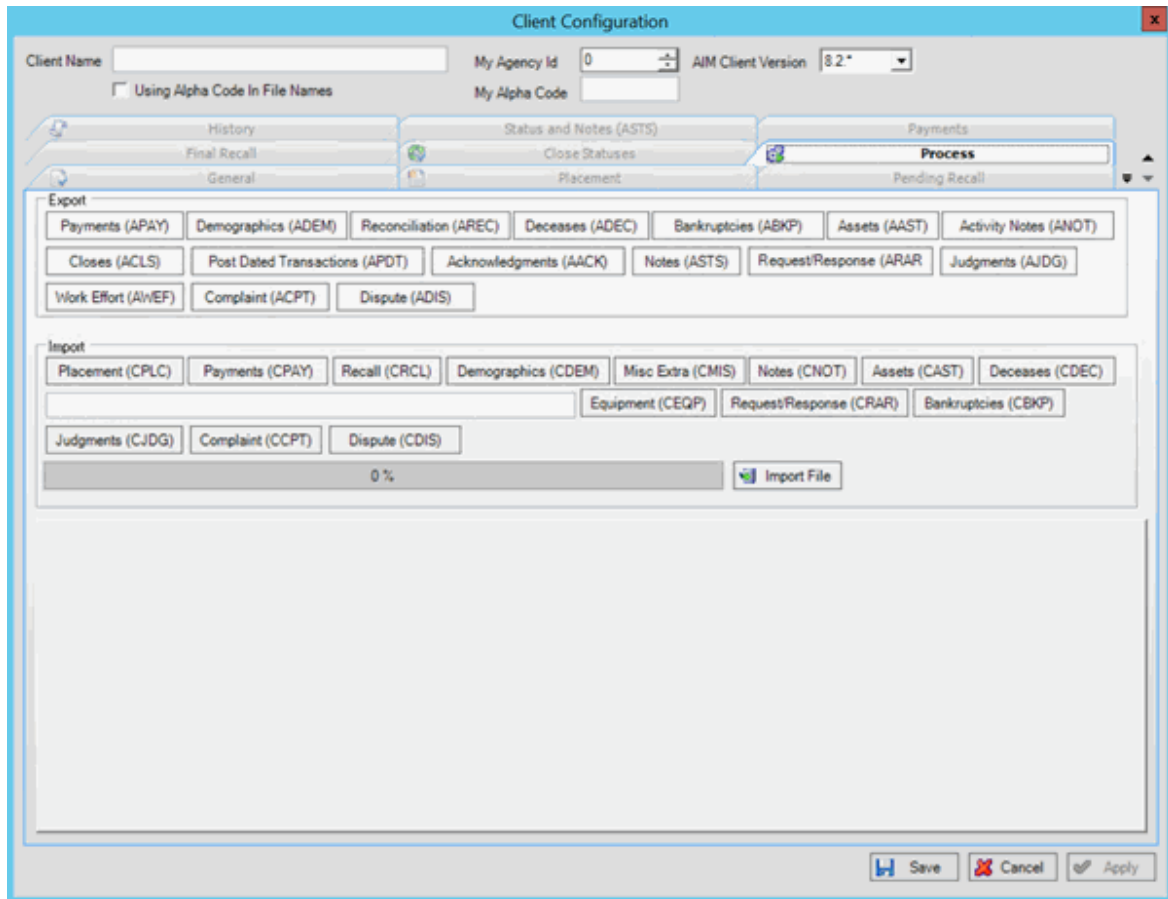
History: Final Recall | Status and Notes (ASTS): Close Statuses | Payments: Process
General: Placement | Pending Recall

Description: ABC Agency
Contact Name:
Phone: 555-555-5555
Email: aadams@abcagency.com
Address: 1000 Main St, Jacksonville, FL 32256

Last Received	Last Sent	
Placement	Recall Objection	Complaint
Pending Recall	Payment	Dispute
Final Recall	Demographic	
Payment	Close	
Demographic	Bankruptcy	
Notes	Deceased	
Misc Extra Data	Reconciliation	
Equipment	Request/Response	
Request/Response	Acknowledgment	
Judgment	Asset	
Deceased	Judgment	
Bankruptcy	Status/Notes	
Complaint	Activity Notes	
Dispute	Work Efforts	

Save Cancel Apply

2. Click the **Process** tab.



3. In the **Export** section, click **Judgments (AJDG)**. The **Save As** dialog box appears.
4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
5. Click **OK**.

Related Topics

[Export Overview](#)



Export Payments

Use the **Process** tab in the **Client Configuration** window to export payments and adjustments that your organization received for accounts that the client placed with your organization. The export file only includes payments that you invoiced to the client using the Invoices program. **To export payments**

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

Client Configuration

Client Name My Agency Id AIM Client Version

☐ Using Alpha Code In File Names My Alpha Code

History Status and Notes (ASTS) Payments
Final Recall Close Statuses Process
General Placement Pending Recall

Description

Contact Name

Phone

Email

Address

Last Received Placement Last Sent Recall Objection Complaint

Pending Recall Payment Dispute

Final Recall Demographic

Payment Close

Demographic Bankruptcy

Notes Deceased

Misc Extra Data Reconciliation

Equipment Request/Response

Request/Response Acknowledgment

Judgment Asset

Deceased Judgment

Bankruptcy Status/Notes

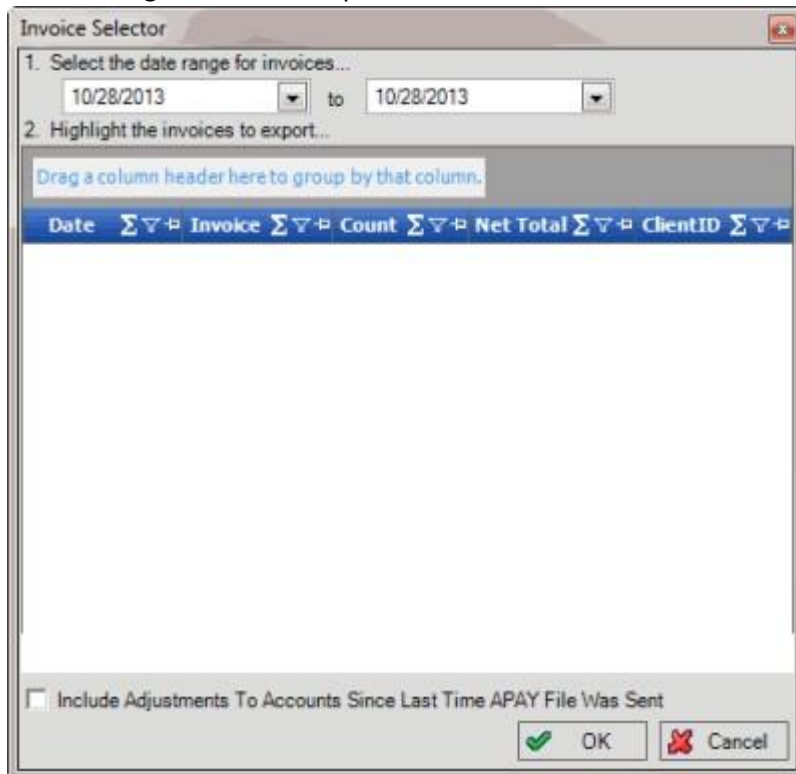
Complaint Activity Notes

Dispute Work Efforts

2. Click the **Process** tab.

The screenshot shows the 'Client Configuration' dialog box. At the top, there are fields for 'Client Name', 'My Agency Id' (set to 0), and 'AIM Client Version' (set to 8.2). Below these are checkboxes for 'Using Alpha Code In File Names' and 'My Alpha Code'. The main area is divided into three tabs: 'History', 'Status and Notes (ASTS)', and 'Payments'. The 'Payments' tab is active, showing a 'Process' button. Below the tabs are three sections: 'Export', 'Import', and a large empty text area. The 'Export' section contains buttons for: Payments (APAY), Demographics (ADEM), Reconciliation (AREC), Deceases (ADEC), Bankruptcies (ABKP), Assets (AAS), Activity Notes (ANOT), Closes (ACLS), Post Dated Transactions (APDT), Acknowledgments (AACK), Notes (ASTS), Request/Response (ARAR), Judgments (AJDG), Work Effort (AWEF), Complaint (ACPT), and Dispute (ADIS). The 'Import' section contains buttons for: Placement (CPLC), Payments (CPAY), Recall (CRCL), Demographics (CDEM), Misc Extra (CMIS), Notes (CNOT), Assets (CAST), Deceases (CDEC), Equipment (CEQP), Request/Response (CRAR), Bankruptcies (CBKP), Judgments (CJDG), Complaint (CCPT), and Dispute (CDIS). At the bottom of the Import section is a progress bar showing 0% and an 'Import File' button. At the very bottom of the dialog are 'Save', 'Cancel', and 'Apply' buttons.

3. In the **Export** section, click **Payments (APAY)**. The **Invoice Selector** dialog box appears.



4. Specify the date range for the invoices to include in the export file. The dialog box displays all invoices that your organization generated for the client during the specified date range.
5. Click the invoices to include in the export file. The **Net Total** signifies the total payments and reversals combined.

Tip: To select multiple sequential invoices, press and hold the **Shift** key and then click the first and last sequential invoice. To select multiple non-sequential invoices, press and hold the **Ctrl** key and then click each invoice.

6. To include invoiced DA (decreasing adjustment) or DAR (decreasing adjustment reversal) transactions in the export file, select the **Include Adjustments to Accounts Since Last Time APAY File Was Sent** check box.
7. Click **OK**. The **Save As** dialog box appears.
8. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
9. Click **OK**.

Related Topics

[Export Overview](#)

Export Post-Dated Transactions

Use the **Process** tab in the **Client Configuration** window to export post-dated transactions that your organization added or updated for accounts that the client placed with your organization. The export file includes all post-dated transactions for accounts that the client placed with your organization, even ones reported previously.

To export post-dated transactions

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

The screenshot shows the 'Client Configuration' window with the 'General' tab selected. The window has a title bar with 'Client Configuration' and a close button. Below the title bar, there are input fields for 'Client Name', 'My Agency Id' (set to 0), and 'AIM Client Version' (set to 8.2). There is also a checkbox for 'Using Alpha Code In File Names' and a field for 'My Alpha Code'. Below these are three tabs: 'History', 'Status and Notes (ASTS)', and 'Payments'. The 'Status and Notes (ASTS)' tab is active, showing sub-tabs for 'Final Recall', 'Close Statuses', 'Placement', and 'Pending Recall'. The 'General' sub-tab is selected, displaying a form with the following fields: 'Description' (ABC Agency), 'Contact Name', 'Phone' (555-555-5555), 'Email' (aadams@abcagency.com), and 'Address' (1000 Main St, Jacksonville, FL 32256). Below these fields are two columns of dropdown menus. The left column includes: 'Last Received', 'Placement', 'Pending Recall', 'Final Recall', 'Payment', 'Demographic', 'Notes', 'Misc Extra Data', 'Equipment', 'Request/Response', 'Judgment', 'Deceased', 'Bankruptcy', 'Complaint', and 'Dispute'. The right column includes: 'Last Sent', 'Recall Objection', 'Payment', 'Demographic', 'Close', 'Bankruptcy', 'Deceased', 'Reconciliation', 'Request/Response', 'Acknowledgment', 'Asset', 'Judgment', 'Status/Notes', 'Activity Notes', and 'Work Efforts'. At the bottom right, there are buttons for 'Save', 'Cancel', and 'Apply'.

2. Click the **Process** tab.

The screenshot shows the 'Client Configuration' window with the 'Export' section selected. The window has a title bar 'Client Configuration' and a close button. Below the title bar are fields for 'Client Name', 'My Agency Id' (set to 0), 'AIM Client Version' (set to 8.2*), and 'My Alpha Code'. There is a checkbox for 'Using Alpha Code In File Names'. The main area is divided into three tabs: 'History', 'Status and Notes (ASTS)', and 'Payments'. The 'Status and Notes (ASTS)' tab is active, showing sub-tabs: 'Final Recall', 'Close Statuses', and 'Placement'. The 'Process' sub-tab is selected, showing a list of export options: Payments (APAY), Demographics (ADEM), Reconciliation (AREC), Deceases (ADEC), Bankruptcies (ABKP), Assets (AAS), Activity Notes (ANOT), Closes (ACLS), Post Dated Transactions (APDT), Acknowledgments (AACK), Notes (ASTS), Request/Response (ARAR), Judgments (AJDG), Work Effort (AWEF), Complaint (ACPT), and Dispute (ADIS). Below this is an 'Import' section with buttons for Placement (CPLC), Payments (CPAY), Recall (CRCL), Demographics (CDEM), Misc Extra (CMIS), Notes (CNOT), Assets (CAST), Deceases (CDEC), Equipment (CEQP), Request/Response (CRAR), Bankruptcies (CBKP), Judgments (CJDG), Complaint (CCPT), and Dispute (CDIS). A progress bar shows 0% and an 'Import File' button is at the bottom right. At the very bottom are 'Save', 'Cancel', and 'Apply' buttons.

3. In the **Export** section, click **Post Dated Transactions (APDT)**. The **Save As** dialog box appears.
4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
5. Click **OK**.

Related Topics

[Export Overview](#)



Export Reconciliation Data

Use the **Process** tab in the **Client Configuration** window to export account data for all accounts that the client placed with your organization.

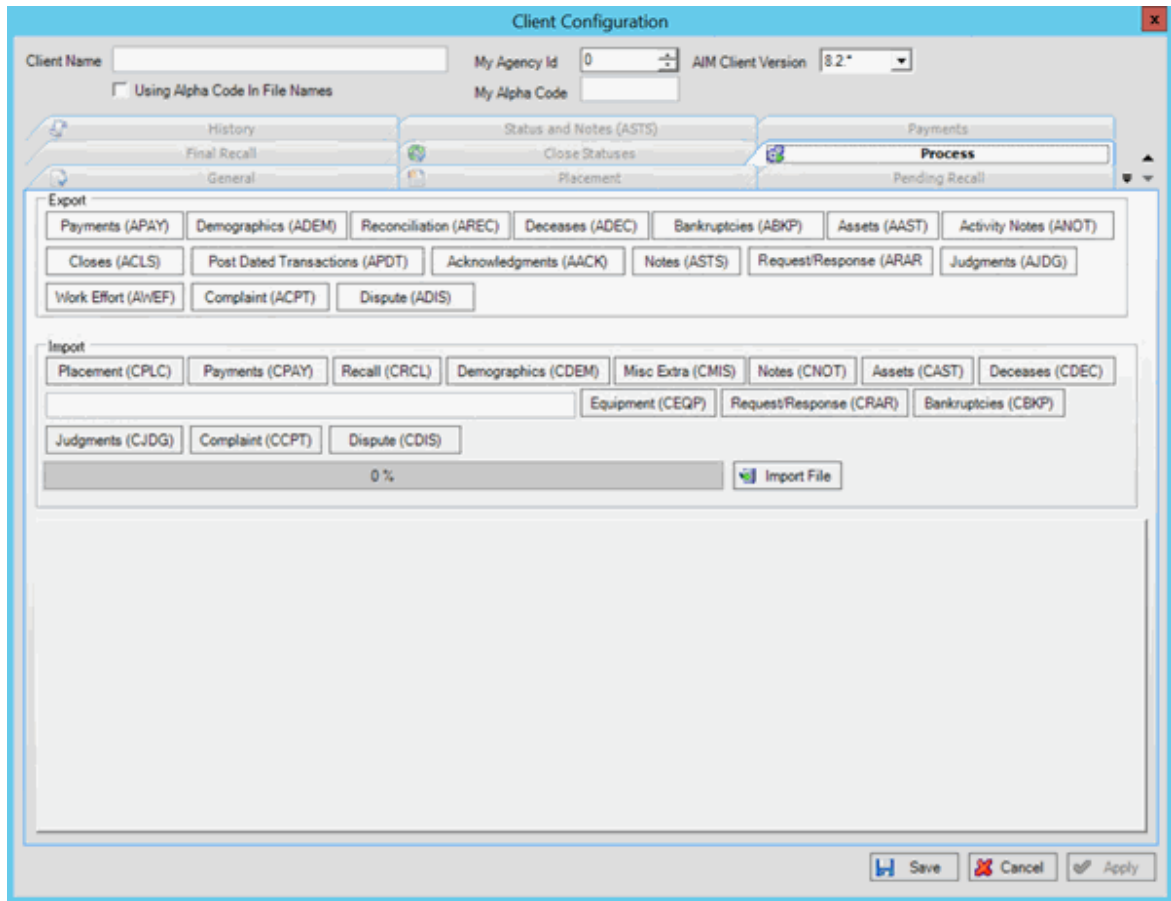
To export reconciliation data

1. **AIM Receiver Manager**
Client Configuration **General** tab selected.

In the window, in the Name column of the data grid, click the Client icon. The window appears, with the

2. Click the **Process** tab.

1. **AIM Receiver Manager**
Client Configuration window appears, with the **General** tab selected.



3. In the **Export** section, click **Reconciliation (AREC)**. The **Save As** dialog box appears.
4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
5. Click **OK**.

Related Topics

[Export Overview](#)



Export Requests and Responses

Use the **Process** tab in the **Client Configuration** window to export responses to account placement requests that your organization received from the client.

To export requests and responses

In the window, in the Name column of the data grid, click the Client icon. The

Client Configuration

Client Name My Agency Id AIM Client Version

☐ Using Alpha Code In File Names My Alpha Code

History Status and Notes (ASTS) Payments
Final Recall Close Statuses Process
General Placement Pending Recall

Description

Contact Name

Phone

Email

Address

Last Received
Placement
Pending Recall
Final Recall
Payment
Demographic
Notes
Misc Extra Data
Equipment
Request/Response
Judgment
Deceased
Bankruptcy
Complaint
Dispute

Last Sent
Recall Objection
Payment
Demographic
Close
Bankruptcy
Deceased
Reconciliation
Request/Response
Acknowledgment
Asset
Judgment
Status/Notes
Activity Notes
Work Efforts

Complaint
Dispute

2. Click the **Process** tab.

1. **AIM Receiver Manager**
Client Configuration window appears, with the **General** tab selected.

3. In the **Export** section, click **Request/Response (ARAR)**. The **Save As** dialog box appears.
4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
5. Click **OK**.

Related Topics

[Export Overview](#)



Export Status Notes

Use the **Process** tab in the **Client Configuration** window to export status changes notes your organization added or updated for accounts that the client placed with your organization.

To export status notes

window, in the Name column of the data grid, click the Client

In the
icon. The

1. **AIM Receiver
Manager
Client Configuration**
window appears, with
the **General** tab
selected.

AIM Receiver Manager Printable Help

Client Configuration

Client Name My Agency Id AIM Client Version
☐ Using Alpha Code In File Names My Alpha Code

History Status and Notes (ASTS) Payments
Final Recall Close Statuses Process
General Placement Pending Recall

Description
Contact Name
Phone
Email
Address

Last Received	<input type="text"/>	Last Sent	<input type="text"/>	Complaint	<input type="text"/>
Placement	<input type="text"/>	Recall Objection	<input type="text"/>	Dispute	<input type="text"/>
Pending Recall	<input type="text"/>	Payment	<input type="text"/>		
Final Recall	<input type="text"/>	Demographic	<input type="text"/>		
Payment	<input type="text"/>	Close	<input type="text"/>		
Demographic	<input type="text"/>	Bankruptcy	<input type="text"/>		
Notes	<input type="text"/>	Deceased	<input type="text"/>		
Misc Extra Data	<input type="text"/>	Reconciliation	<input type="text"/>		
Equipment	<input type="text"/>	Request/Response	<input type="text"/>		
Request/Response	<input type="text"/>	Acknowledgment	<input type="text"/>		
Judgment	<input type="text"/>	Asset	<input type="text"/>		
Deceased	<input type="text"/>	Judgment	<input type="text"/>		
Bankruptcy	<input type="text"/>	Status/Notes	<input type="text"/>		
Complaint	<input type="text"/>	Activity Notes	<input type="text"/>		
Dispute	<input type="text"/>	Work Efforts	<input type="text"/>		

2. Click the **Process** tab.

The screenshot shows the 'Client Configuration' window. At the top, there are fields for 'Client Name', 'My Agency Id' (set to 0), and 'AIM Client Version' (set to 8.2). Below these is a checkbox for 'Using Alpha Code In File Names' and a field for 'My Alpha Code'. The window has several tabs: 'History', 'Status and Notes (ASTS)', 'Payments', 'Final Recall', 'Close Statuses', 'Process', 'General', 'Placement', and 'Pending Recall'. The 'Process' tab is currently selected. Under the 'Export' section, there are buttons for: Payments (APAY), Demographics (ADEM), Reconciliation (AREC), Deceases (ADEC), Bankruptcies (ABKP), Assets (AAS), Activity Notes (ANOT), Closes (ACLS), Post Dated Transactions (APDT), Acknowledgments (AACK), Notes (ASTS), Request/Response (ARAR), Judgments (AJDG), Work Effort (AWEF), Complaint (ACPT), and Dispute (ADIS). The 'Notes (ASTS)' button is highlighted. Below the 'Export' section is an 'Import' section with buttons for: Placement (CPLC), Payments (CPAY), Recall (CRCL), Demographics (CDEM), Misc Extra (CMIS), Notes (CNOT), Assets (CAST), Deceases (CDEC), Equipment (CEQP), Request/Response (CRAR), Bankruptcies (CBKP), Judgments (CJDG), Complaint (CCPT), and Dispute (CDIS). At the bottom of the 'Import' section is a progress bar showing 0% and an 'Import File' button. At the very bottom of the window are 'Save', 'Cancel', and 'Apply' buttons.

3. In the **Export** section, click **Notes (ASTS)**. The **Save As** dialog box appears.
4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
5. Click **OK**.

Related Topics

[Export Overview](#)



Export Work Effort

Use the **Process** tab in the **Client Configuration** window to export work efforts that your organization added or updated for accounts that the client placed with your organization.

To export status notes

1. window appears, with the **General** tab selected.

In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration**

Client Configuration

Client Name My Agency Id AIM Client Version My Alpha Code

☐ Using Alpha Code In File Names

History Status and Notes (ASTS) Payments

Final Recall Close Statuses Process

General Placement Pending Recall

Description

Contact Name

Phone

Email

Address

Last Received Placement Pending Recall Final Recall Payment Demographic Notes Misc Extra Data Equipment Request/Response Judgment Deceased Bankruptcy Complaint Dispute

Last Sent Recall Objection Payment Demographic Close Bankruptcy Deceased Reconciliation Request/Response Acknowledgment Asset Judgment Status/Notes Activity Notes Work Efforts

Complaint Dispute

Save Cancel Apply

2. Click the **Process** tab.

The screenshot shows the 'Client Configuration' window. At the top, there are fields for 'Client Name', 'My Agency Id' (set to 0), and 'AIM Client Version' (set to 8.2). Below these is a checkbox for 'Using Alpha Code In File Names' and a field for 'My Alpha Code'. The main area is divided into several tabs: 'History', 'Status and Notes (ASTS)', 'Payments', 'Final Recall', 'Close Statuses', 'Process', 'General', 'Placement', and 'Pending Recall'. The 'Process' tab is currently selected. Under the 'Export' section, there are buttons for: Payments (APAY), Demographics (ADEM), Reconciliation (AREC), Deceases (ADEC), Bankruptcies (ABKP), Assets (AAS), Activity Notes (ANOT), Closes (ACLS), Post Dated Transactions (APDT), Acknowledgments (AACK), Notes (ASTS), Request/Response (ARAR), Judgments (AJDG), Work Effort (AWEF), Complaint (ACPT), and Dispute (ADIS). The 'Work Effort (AWEF)' button is highlighted. Below the 'Export' section is an 'Import' section with buttons for: Placement (CPLC), Payments (CPAY), Recall (CRCL), Demographics (CDEM), Misc Extra (CMIS), Notes (CNOT), Assets (CAST), Deceases (CDEC), Equipment (CEQP), Request/Response (CRAR), Bankruptcies (CBKP), Judgments (CJDG), Complaint (CCPT), and Dispute (CDIS). At the bottom of the 'Import' section is a progress bar showing '0 %' and an 'Import File' button. The bottom of the window has 'Save', 'Cancel', and 'Apply' buttons.

3. In the **Export** section, click **Work Effort (AWEF)**. The **Save As** dialog box appears.
4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
5. Click **OK**.

Related Topics

[Export Overview](#)