



Latitude Management Suite Extension Wizard Printable Help

Version 2024 R2

Last updated November 05, 2024

Abstract

This document is a printable version of Latitude Management Suite Extension Wizard help.

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

Table of Contents

Introduction to Latitude Management Suite Extension Wizard	1
Log on to Latitude Management Suite Extension Wizard.....	2
Select the Task to Process.....	4
Create Query to Select Accounts	5
View Query Results Summary.....	5
Processing Parameters.....	6
Processing Parameters.....	6
Specify Parameters for Updating System Month and Year	6
Specify Parameters for Changing Customer Codes.....	7
Specify Parameters for Updating Fee Schedules	8
Specify Parameters for Updating Restricted Access	9
Process the Accounts	10
View History.....	12

Introduction to Latitude Management Suite Extension Wizard

Latitude Management Suite Extension Wizard allows you to update batches of accounts. With the appropriate permissions, you can do the following:

- Change the account's customer code on a batch of business.
- Update the system month and year for a batch of payment or reversal transactions.
- Update the fee schedule (master.feecode) on a batch of accounts.
- Update restricted access for a batch of accounts.
- View a history of updates.

Log on to Latitude Management Suite Extension Wizard

Use the **Latitude Login** dialog box to log on to Latitude Management Suite Extension Wizard. To

log on to Latitude Management Suite Extension Wizard

1. Open “\Program Files (x86)\Interactive Intelligence\Interaction Collector\bin.”
2. Double-click "LatitudeManagementSuiteExtensionWizard.exe." The **Latitude Login** dialog box appears.



User Name: Your Latitude user name.

Password: Your Latitude password. As you type your password, the system displays periods instead of the typed characters.

Note: To log on using Windows authentication, select the Log in using Windows authentication check box and provide your Windows user name and password.

3. Complete the information and then click **Okay**. The **Latitude Management Suite Extension Wizard** page appears.

Latitude Management Suite Extension Wizard Printable Help



4. Click **Next**.

Related Topics

[Introduction to Latitude Management Suite Extension Wizard](#)

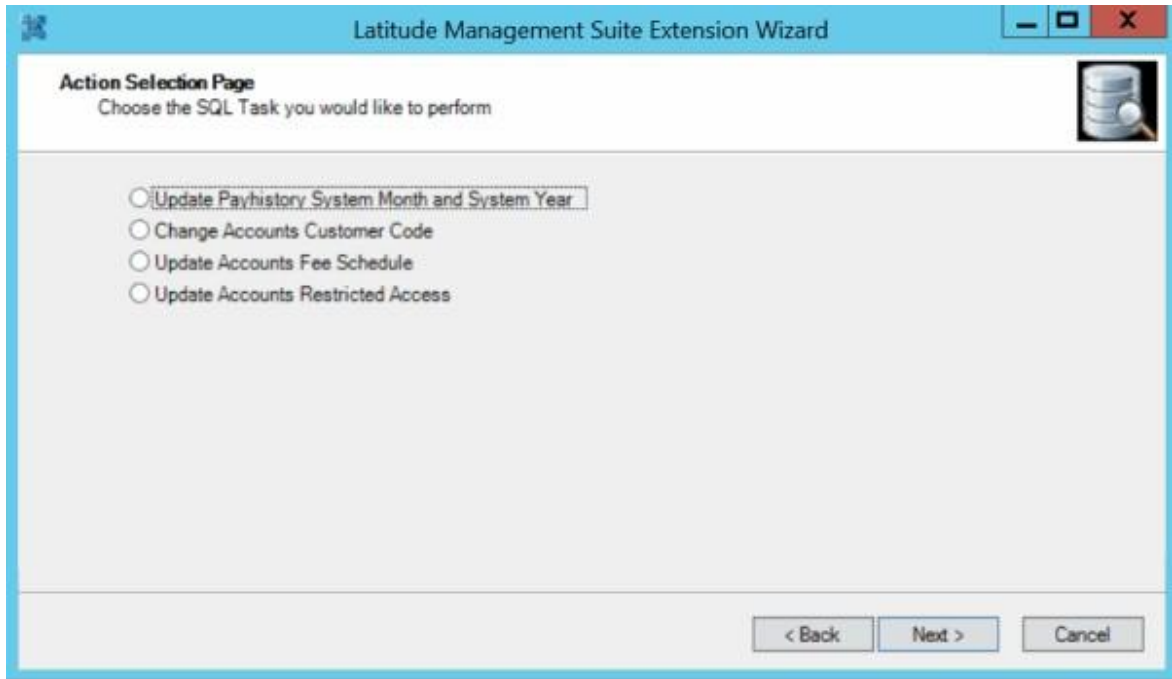
Help Overview

Select the Task to Process

Use the **Action Selection** page to specify the task you want the wizard to process.

To select the task to process

1. Ensure that you are on the **Action Selection** page.



Update Payhistory System Month and System Year: If selected, updates the system month and year for a batch of payment or reversal transactions. This task does not update the system month and year on linked payments; only the payments captured in the query.

Change Accounts Customer Code: If selected, changes an account's customer code on a batch of business.

Update Accounts Fee Schedule: If selected, updates the fee schedule (master.feecode) on a batch of accounts.

Update Account Restricted Access: If selected, updates the restricted access settings for a batch of accounts.

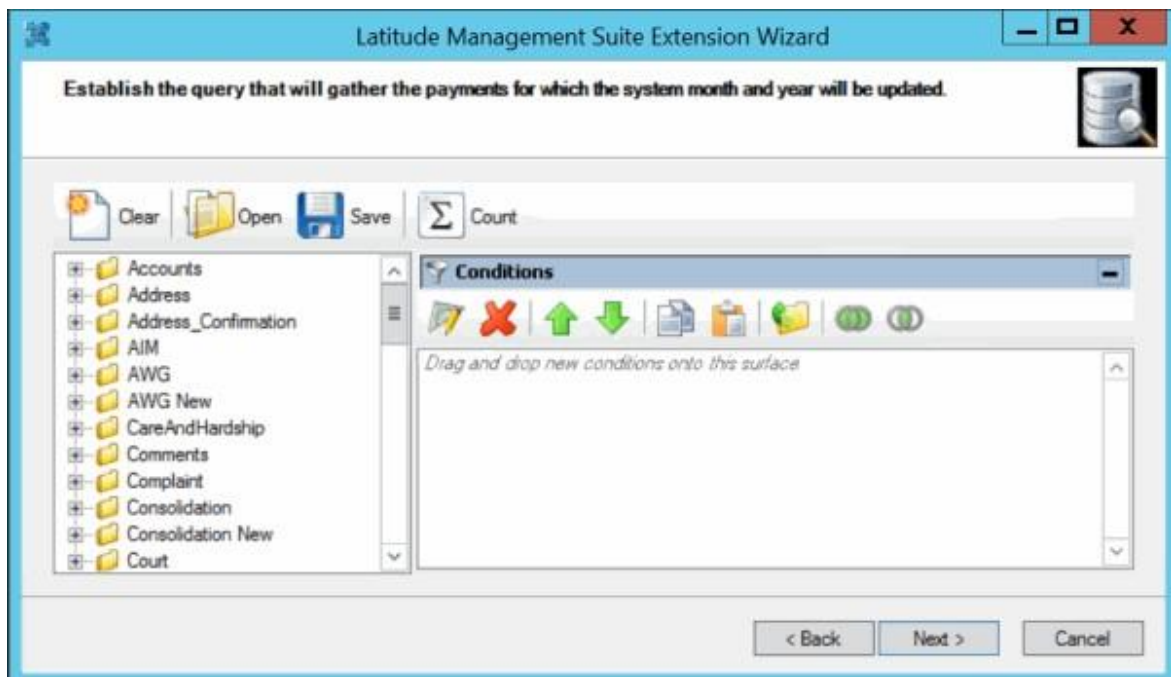
2. Click the task to process and then click **Next**.

Create Query to Select Accounts

Use the **Query** page to create a query to select the accounts you want the wizard to process.

To create a query to select accounts

1. Ensure that you are on the **Query** page.



2. Open an existing query or specify the conditions for a new query and then click **Next**.

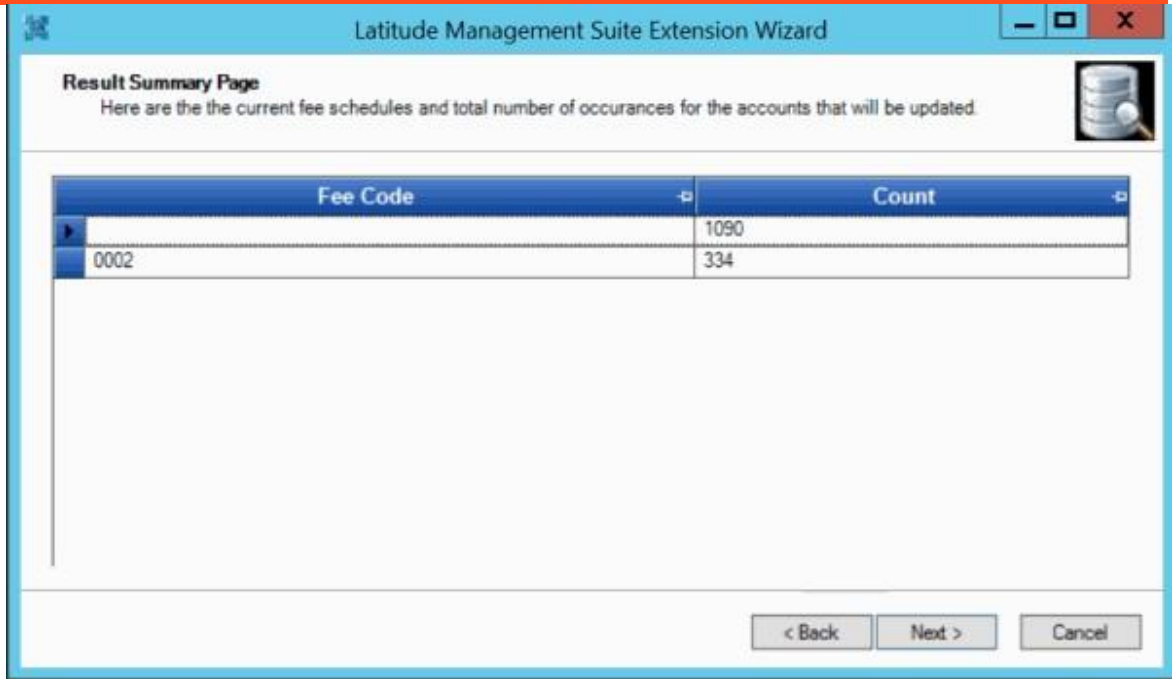
Note: For more information about using queries, see "Queries" in the *Latitude* documentation.

View Query Results Summary

Use the **Result Summary** page to view the number of accounts selected for processing, and other summary information. The information that displays on this page depends on the task you selected in a previous step.

To view query results summary

1. Ensure that you are on the **Result Summary** page. The following example shows the information that displays for the Change Accounts Restricted Access task.



Result Summary Page
Here are the the current fee schedules and total number of occurrences for the accounts that will be updated.

Fee Code	Count
	1090
0002	334

< Back Next > Cancel

2. After reviewing the results, do one of the following:
3. To modify the query, click **Back**.
4. To continue to the next page, click **Next**.

Processing Parameters

Processing Parameters

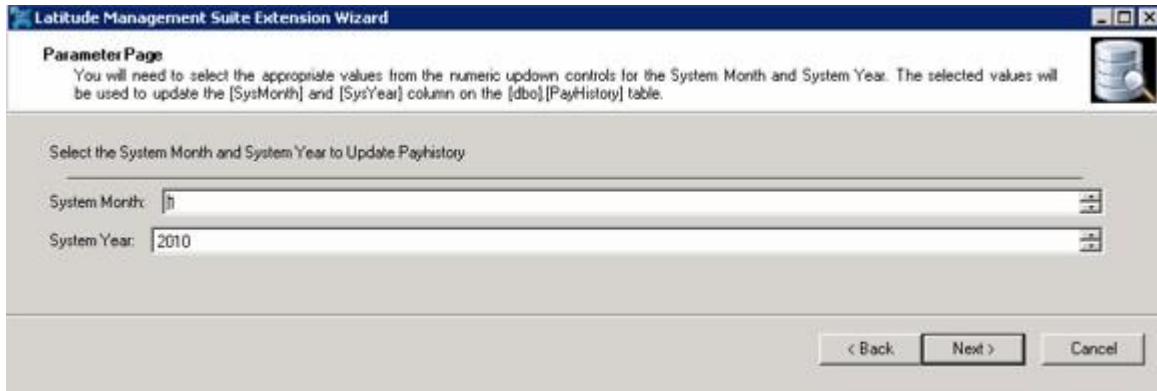
Use the **Parameter** page to specify the parameters for processing accounts. The information that displays on this page depends on the task you selected in a previous step.

Specify Parameters for Updating System Month and Year

If you selected the **Update Payhistory System Month and System Year** option on the **Action Selection Page**, specify the parameters for updating the system month and year for a batch of payment or reversal transactions.

To specify parameters for system month and year

1. Ensure that you are on the **Parameter** page.



System Month: Month to which to set the payment transactions.

System Year: Year to which to set the payment transactions.

2. Specify the system month, system year, or both and then click **Next**.



[Feedback](#)

Specify Parameters for Changing Customer Codes

If you selected the **Change Accounts Customer Code** option on the **Action Selection Page**, specify the parameters for changing the customer code on a batch of business.

To specify parameters for customer codes

Processing Parameters 1. Ensure that you are on the **Parameter** page.



2. In the **Customers** list box, click the customer to assign and then click **Next**.



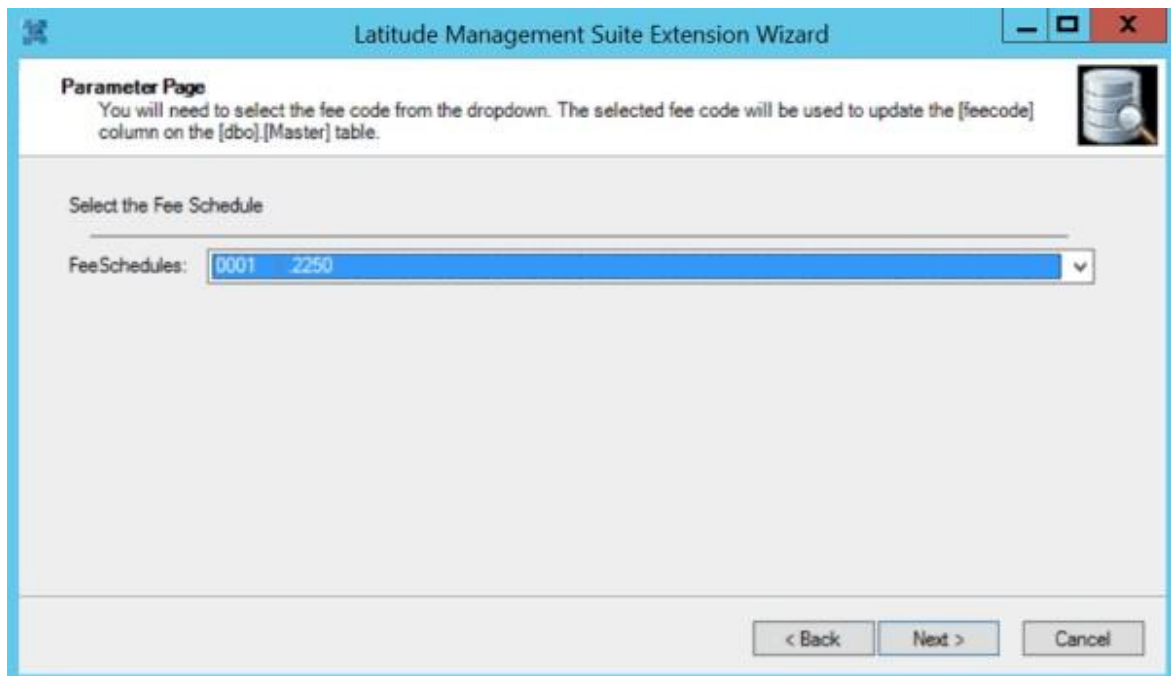
[Feedback](#)

Specify Parameters for Updating Fee Schedules

If you selected the **Update Accounts Fee Schedule** option on the **Action Selection Page**, specify the parameters for updating the fee schedule on a batch of accounts.

To specify parameters for fee schedules

1. Ensure that you are on the **Parameter** page.



2. In the **Fee Schedules** list box, click the fee schedule to apply and then click **Next**.



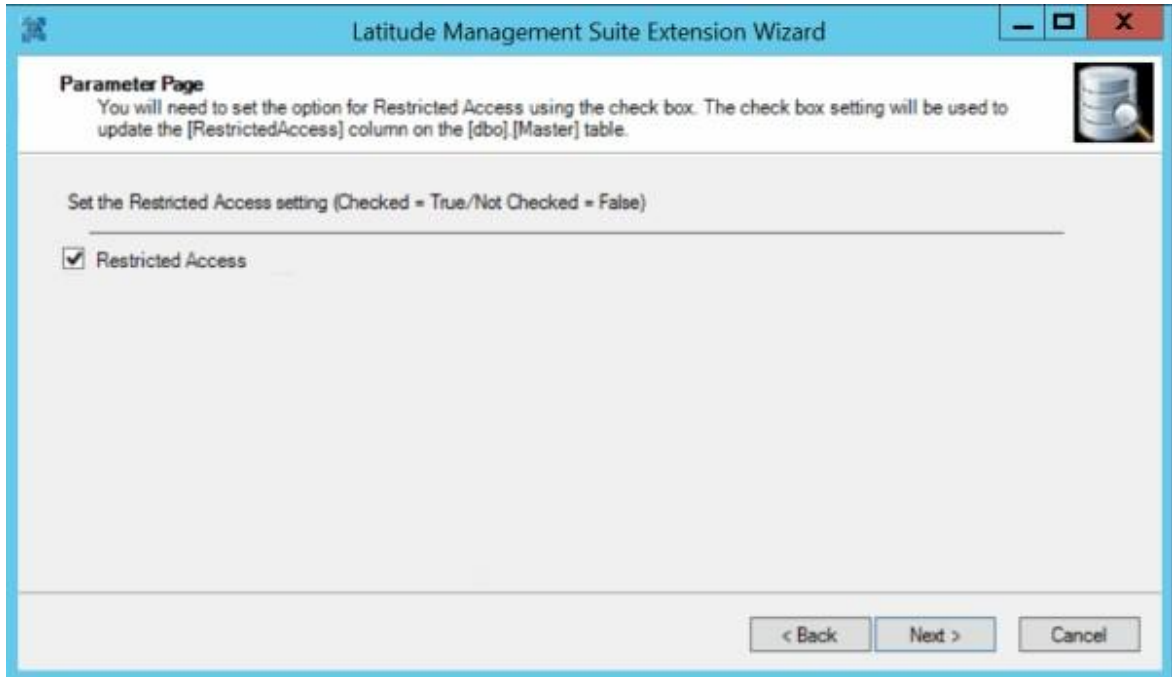
[Feedback](#)

Specify Parameters for Updating Restricted Access

If you selected the **Update Accounts Restricted Access** option on the **Action Selection Page**, specify the parameters for updating restricted access for a batch of accounts.

To specify parameters for restricted access

1. Ensure that you are on the **Parameter** page.



The screenshot shows a window titled "Latitude Management Suite Extension Wizard". The main area is labeled "Parameter Page" and contains the following text: "You will need to set the option for Restricted Access using the check box. The check box setting will be used to update the [RestrictedAccess] column on the [dbo].[Master] table." Below this text is a section titled "Set the Restricted Access setting (Checked = True/Not Checked = False)". Under this section is a single checkbox labeled "Restricted Access", which is currently checked. At the bottom right of the window are three buttons: "< Back", "Next >", and "Cancel".

Restricted Access: If selected, only users with the Restricted Access Accounts permission can view the accounts. If cleared, all users can view the accounts.

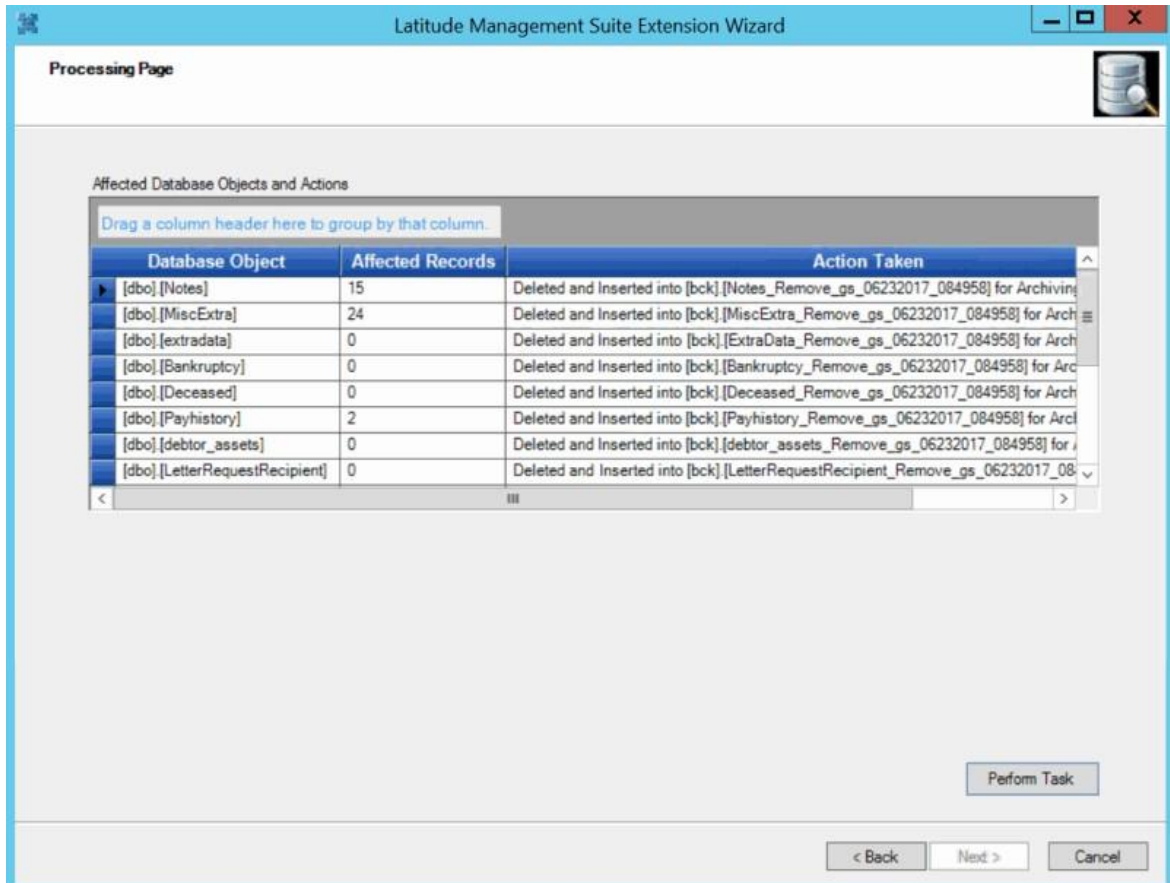
2. Select or clear the **Restricted Access** check box and then click **Next**.

Process the Accounts

Use the **Processing** page to process the accounts you selected in the query based on the specified task and parameters. The information that displays on this page depends on the task you selected in a previous step.

To process the accounts

1. Ensure that you are on the **Processing** page.



2. Review the information and then click **Perform Task**. When the wizard finishes processing the task, the **SQL Task Completed** page appears.

SQL Task Completed!

Successfully completed the Update Payhistory System Month and System Year task. Results are detailed below.

Chosen Action: Update Payhistory System Month and System Year

Action ID: 113eb275-2d8c-4ba0-abcc-cfe1fa5ed232

History ID: 1 Total Records Affected: 2

User: gs

Began At: 06/23/2017 08:55:05 Finished At: 06/23/2017 08:55:36

History Tables

Drag a column header here to group by that column.

Table Name
[bck].[Payhistory_SystemMonthAndYearUpdate_gs_06232017_085505]

To close this wizard, click Finish.

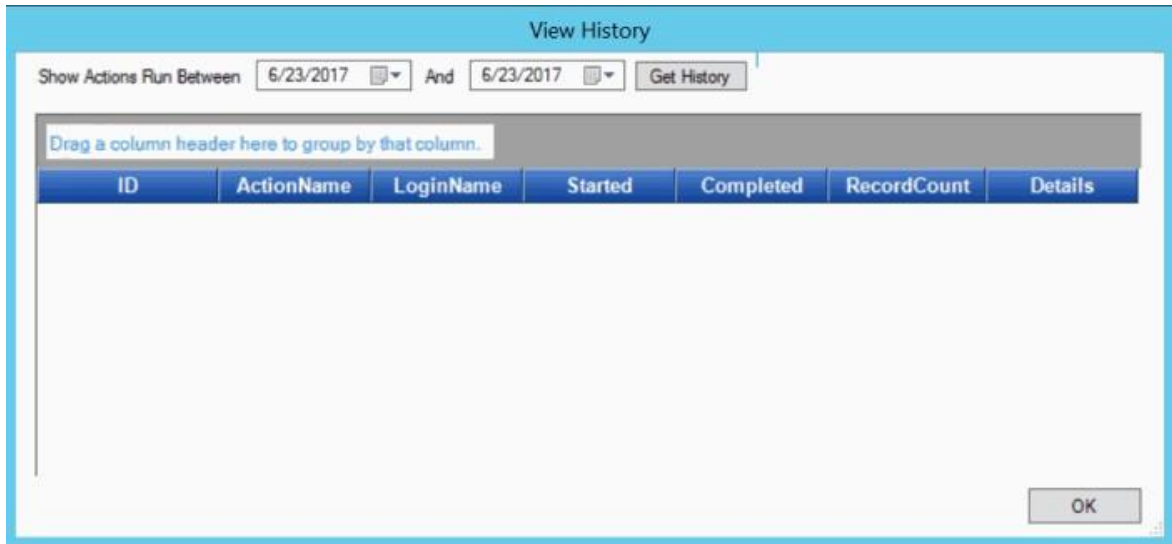
< Back Finish Cancel

3. Click **Finish**. The **Welcome** page appears.
4. To close the wizard, click **Cancel**.

View History

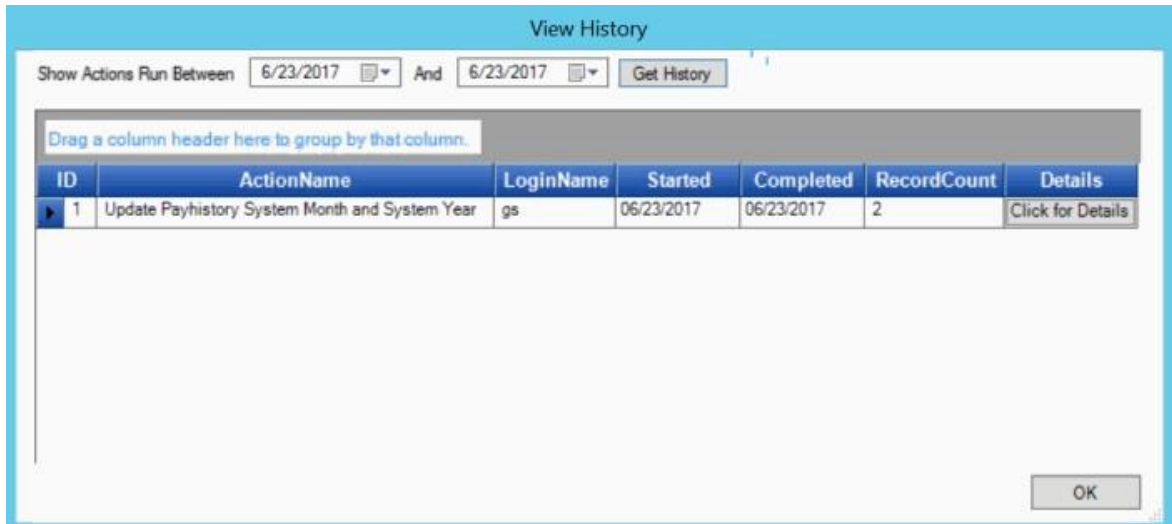
You can view a history of account updates your organization processed using the Latitude Management Suite Extension Wizard. **To view history**

1. On the **Welcome** page of the wizard, click **Show History**. The **View History** dialog box appears.



The screenshot shows the 'View History' dialog box. At the top, it has a title bar 'View History'. Below the title bar, there is a section 'Show Actions Run Between' with two date pickers, both set to '6/23/2017', and an 'And' button between them. To the right of the date pickers is a 'Get History' button. Below this section is a text box that says 'Drag a column header here to group by that column.' Below the text box is a table with the following columns: ID, ActionName, LoginName, Started, Completed, RecordCount, and Details. The table is currently empty. At the bottom right of the dialog box is an 'OK' button.

2. Specify the processing date range for which to display history and then click **Get History**. Actions that the system processed during the specified date range appear in the data grid.



The screenshot shows the 'View History' dialog box with data. The 'Show Actions Run Between' section is the same as in the previous screenshot. The table now contains one row of data:

ID	ActionName	LoginName	Started	Completed	RecordCount	Details
1	Update Payhistory System Month and System Year	gs	06/23/2017	06/23/2017	2	Click for Details

At the bottom right of the dialog box is an 'OK' button.

ID: Code that identifies the historical record.

ActionName: Action the wizard ran against the accounts.

LoginName: ID of the user who ran the wizard.

Started: Date the wizard started processing the accounts.

Completed: Date the wizard finished processing the accounts.

RecordCount: Number of records the system processed.

3. To group data, click the column heading and drag it to the place indicated.
4. To view details for an action, in the Details column, click **Click for Details**. The **Applied Configuration** dialog box appears.

The **Applied Configuration** dialog box is divided into four main sections:

- Context Gathering SQL:** Contains a text area with the following SQL query:


```
SELECT [payhistory].[UID] AS [Transaction ID]
FROM [dbo].[master] WITH (NOLOCK)
INNER JOIN [payhistory] AS [payhistory] WITH (NOLOCK)
ON [master].[number] = [payhistory].[number]
WHERE ([master].[number] = 100053)
```
- Executed SQL:** Contains a text area with the following SQL query:


```
UPDATE [dbo].[Payhistory] SET [SystemMonth] = 1, [SystemYear] = 2010
WHERE [Payhistory].[UID]
IN(SELECT TOP 100 PERCENT
[payhistory].[UID] AS [Transaction ID]
FROM [dbo].[master] WITH (NOLOCK)
INNER JOIN [payhistory] AS [payhistory] WITH (NOLOCK)
ON [master].[number] = [payhistory].[number]
WHERE ([master].[number] = 100053)
)
```
- History Tables:** Features a table with a single row:

Name
[bck].[Payhistory_SystemMonthAndYearUpdate_gs_06232017_085505]
- Update Parameters:** Features a table with two rows:

Name	Value
SystemMonth	1
SystemYear	2010

An **OK** button is located at the bottom right of the dialog.

Context Gathering SQL: SQL code the system used to select accounts for processing.

Executed SQL: SQL code the system used to process accounts.

History Tables: Tables the system updated when processing accounts

Update Parameters: Parameters the system used to process accounts.

5. To group the history tables or parameters, click the column heading and drag it to the place indicated.
6. When finished viewing the information, click **OK**.