



# Account Analysis Conditions

## Technical Reference

Version 10.0

Last updated July 12, 2019

(See [Change Log](#) for a summary of changes to this document since its initial release.)

### **Abstract**

This document describes the Account Analysis conditions used to query data in the Latitude by Genesys database.

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## Table of Contents

Introduction to Account Analysis Conditions .....	7
Condition Types .....	7
Date.....	7
Specific date .....	7
Date range.....	8
Any date or blank date.....	8
Relative date .....	8
Single option .....	9
Multiple options.....	9
Accounts.....	9
Accounts.....	9
Account Age .....	11
Balance.....	11
Branch .....	12
Care and Hardship.....	12
Complaint.....	15
Credit Bureau Reporting .....	18
Credit Bureau Reporting .....	18
CbrDataPaidByInsurance.....	18
CbrDataPendingExceptionDtlv.....	18
Customer.....	19
Desk.....	20
Desk.....	20
Desk History .....	20
Dispute .....	20
Income and Expense .....	22
Queue.....	22
Queue.....	22
Support Queue Items.....	23
Status .....	23

Status .....	23
Status History .....	24
AIM.....	24
AIM.....	24
AIM_AccountReference .....	26
AIM_AccountTransaction .....	27
AIM_AccountTransaction.....	27
Close Files (ACLS) .....	28
Objection Files (AOBJ).....	29
Payment Files (APAY).....	29
Recall Files (CRCL) .....	29
AIM_BatchFileHistory .....	29
Arrangements .....	30
Care and Hardship.....	30
Complaint.....	32
Debt Forwarding .....	35
Debt Forwarding .....	35
Placement History.....	36
Tiers.....	36
Debt Purchasing.....	36
Debtor Demographics.....	36
Debtor Demographics.....	36
Address .....	37
Address .....	37
Address History .....	38
Bank Information .....	39
Bankruptcy .....	39
Credit Bureau Reporting .....	41
Employer .....	41
Phone Numbers .....	42
Phone Numbers .....	42
Phone History.....	42

Account Analysis Conditions Technical Reference

Phone\_Panel ..... 43

Spouse..... 44

    Spouse..... 44

    Employer ..... 44

Dialers ..... 45

Dispute ..... 45

Early Stage Data ..... 47

Income and Expense ..... 47

Latitude Fusion..... 47

Legal ..... 48

    Legal ..... 48

    Courts..... 48

        Courts..... 48

        Case Court..... 48

        Garnishment Court ..... 49

        Judgment Court..... 50

    Dates ..... 51

    Debtor Attorney..... 52

    Judgment Information ..... 53

    Our Attorney ..... 55

Letters ..... 56

    Letters ..... 56

    Letter Requests ..... 56

Money Buckets..... 57

    Money Buckets..... 57

    Accrued ..... 57

    Current ..... 57

    Original..... 58

    Paid ..... 59

Patient Information..... 59

    Patient Information..... 59

    Address ..... 60

- Doctor Information ..... 61
- Facility Information..... 61
  - Facility Information ..... 61
  - Address ..... 61
- Insurance Information ..... 62
- Kin Information ..... 64
- Payments..... 64
  - Payments..... 64
  - Payment Summary..... 65
    - Payment Summary ..... 65
    - Fees ..... 65
    - Payments..... 73
    - Transactions ..... 81
- Stair Step ..... 82
  - Stair Step ..... 82
  - Fees ..... 82
  - Gross ..... 92
  - Invoicable ..... 95
- Transaction History ..... 100
- Portfolio Contacts ..... 101
  - Portfolio Contacts ..... 101
  - Debt Buyer Groups..... 101
  - Demographics ..... 102
  - Preferences ..... 103
- Portfolios..... 103
- Post Dates ..... 104
  - Post Dates ..... 104
  - Post-Dated Checks ..... 105
    - Post-Dated Checks ..... 105
    - Current Post-Dated Checks ..... 105
  - Post-Dated Credit Cards..... 106
    - Post-Dated Credit Cards..... 106

Account Analysis Conditions Technical Reference

Current Post-Dated Credit Cards .....	107
Promises.....	109
Promises.....	109
Current Promises .....	109
Restrictions .....	110
Restrictions .....	110
Assets .....	110
Assets .....	110
Individual Assets .....	111
Attorney .....	111
Bankruptcy .....	112
Bankruptcy .....	112
Court Information .....	113
Trustee Information .....	114
Deceased.....	114
Work Strategies.....	115
Work Strategies.....	115
Blank Literal Condition.....	115
Change Log.....	116

## Introduction to Account Analysis Conditions

Latitude releases with several standard conditions that you can use to create queries for retrieving specific accounts. For example, you can use the conditions in a query to retrieve a group of accounts that you want users to work.

The Account Analysis tool allows you to create queries using these conditions and then run the queries to retrieve accounts that meet the specified conditions. For information about using the tool, see "Account Analysis" in the *Latitude* documentation at [https://help.genesys.com/latitude/10/mergedProjects/Latitude/desktop/account\\_analysis.htm](https://help.genesys.com/latitude/10/mergedProjects/Latitude/desktop/account_analysis.htm).

The Condition Builder tool allows you to create your own conditions. For more information, see "Condition Builder" in the *Latitude* documentation at [https://help.genesys.com/latitude/10/mergedProjects/Latitude/desktop/condition\\_builder.htm](https://help.genesys.com/latitude/10/mergedProjects/Latitude/desktop/condition_builder.htm).

## Condition Types

You use query conditions when creating and running queries. For each condition that you select for your query, you specify the criteria to use to evaluate accounts. The criteria available is based on the condition type.

Each condition is one of the following types:

- Date
- Single option
- Multiple options

### Date

Date conditions allow you to query accounts based on a specific date, date range, any date or blank date, OR relative date. When you select a date condition, a dialog box displays to allow you to specify the date criteria. The criteria available depends on the value you select in the **Value** list box, and whether you select the **Relative** check box.

#### Specific date

Use one of the following comparisons to retrieve accounts based on a specific date:

Value is	Result
Equal To	Retrieves accounts where the date matches a specific date.
Not Equal To	Retrieves accounts where the date does not match a specific date.
Later Than or Equal To	Retrieves accounts where the date matches or comes after a specific date.
Earlier Than or Equal To	Retrieves accounts where the date matches or comes before a specific date.
Later Than	Retrieves accounts where the date comes after a specific date.

<b>Value is</b>	<b>Result</b>
Earlier Than	Retrieves accounts where the date comes before a specific date.

### Date range

Use one of the following comparisons to retrieve accounts based on a date range:

<b>Value is</b>	<b>Result</b>
Between	Retrieves accounts where the date falls between two specific dates.
Not Between	Retrieves accounts where the date comes before a specific start date or after a specific end date, but not between the two dates.

### Any date or blank date

Use one of the following comparisons to retrieve accounts based on whether a date is blank or contains any value:

<b>Value is</b>	<b>Result</b>
No Value	Retrieves accounts where the date is blank.
Any Value	Retrieves accounts where the date is any date or blank.

### Relative date

Use the relative date option to retrieve accounts based on the relation of a date to the current date. You specify a comparison and the criteria to use to calculate the relative date. The criteria are the number of days, months, or years from the current date, and whether to add or subtract that number from the current date.

Use one of the following comparisons to retrieve accounts based on the calculated relative date:

<b>Value is</b>	<b>Result</b>
Equal To	Retrieves accounts where the date matches the relative date.
Not Equal To	Retrieves accounts where the date does not match the relative date.
Later Than or Equal To	Retrieves accounts where the date matches or comes after the relative date.
Earlier Than or Equal To	Retrieves accounts where the date matches or comes before the relative date.



Value is	Result
Later Than	Retrieves accounts where the date comes after the relative date.
Earlier Than	Retrieves accounts where the date comes before the relative date.

### Single option

Single option conditions allow you to retrieve accounts that match a single option in a group of options. For example, retrieving all closed accounts, or retrieving all open accounts.

### Multiple options

Multiple option conditions allow you to retrieve accounts that match one or more options in a group of options. For example, retrieving all accounts assigned to desk "A" and all accounts assigned to desk "B."

### Accounts

#### Accounts

Accounts conditions allow you to query accounts based on account-based criteria.

Condition	Table	Column	Description
Account Linked?	Master	Link	Account is the parent link, child link, or isn't linked to other accounts.
Account Open?	Master	Qlevel	Account has an open, closed, or returned status.
Active Status?	Master	Status	Account has an active or closed status.
Archived?	Master	Archived	Account is archived.
Charge Off Date	Master	ChargeOffDate	Account has a charge-off date.
Closed and Returned?	Master	Qlevel Returned	Account has a closed and returned status.
Closed Date	Master	Closed	Date the account closed.
Contract Date	Master	ContractDate	Date the contract started.
Customer Account Number	Master	Account	Customer-assigned account number.

Account Analysis Conditions Technical Reference

<b>Condition</b>	<b>Table</b>	<b>Column</b>	<b>Description</b>
Customer Amount Last Charge	Master	Cialc	Last amount your organization charged the customer.
Customer Amount Last Paid	Master	Cialp	Last amount the customer paid your organization.
Customer Date Last Charge	Master	Clidlc	Last date that your organization charged the customer.
Customer Date Last Paid	Master	Clidlp	Last date that the customer paid your organization.
Delinquency Date	Master	DelinquencyDate	Date the account became delinquent.
Desk 2	Master	Desk2	Assigned desk.
File Number	Master	Number	Latitude-assigned account number.
Has Credit Bureau Report?	Hardcopy	Number	Account does or doesn't have credit bureau report information.
ID #1	Master	Id1	Debtor ID 1.
ID #2	Master	Id2	Debtor ID 2.
Last Interest Date	Master	LastInterest	Last date that your organization charged the customer interest.
Link Driver	Master	Link LinkDriver	Driver (main account) in a group of linked accounts.
Original Creditor	Master	OriginalCreditor	Original creditor on the account.
Received Date	Master	Received	Date that your organization received the account.
Restricted?	Master	RestrictedAccess	Account has access restrictions.
Returned Date	Master	Returned	Date your organization returned the account to the customer.
Score	Master	Score	Collection score.

Condition	Table	Column	Description
User Date #1	Master	UserDate1	User-defined date 1.
User Date #2	Master	UserDate2	User-defined date 2.
User Date #3	Master	UserDate3	User-defined date 3.

## Account Age

Account Age conditions allow you to query accounts based on the age of accounts.

Condition	Table	Column	Description
Batch Months on System		Calculated	Number of months the payment batch has been on the system.
Current Month	ControlFile_CurrentMonth	CurrentMonth	Current system month.
Days on System	Master	Received	Number of days since receiving the account that the account has been in the system.
Months on System	Master	Received	Number of months since receiving the account that the account has been in the system.
Statute of Limitations Date	Master	DelinquencyDate	Statute of limitations date for suing for payment of the delinquent debt.
System Month	Master	SysMonth	Payment batch processing month.

## Balance

Balance conditions allow you to query accounts based on account balance criteria.

Condition	Table	Column	Description
Current Balance	Master	Current0	Current balance on the account.

## Account Analysis Conditions Technical Reference

Condition	Table	Column	Description
Current Interest Balance	Master	Current2	Current interest balance on the account.
Current Principal	Master	Current1	Current principal balance on the account.
Linked Current Balance	Linked	Current0	Sum of the current account balance for all linked accounts.
Original Balance	Master	Original	Original balance on the account.
Original Principal	Master	Original1	Original principal balance on the account.

### Branch

Branch conditions allow you to query accounts based on assigned branches.

Condition	Table	Column	Description
Branch	Master	Branch	Branch or branches assigned to the account.
Branch Code	Desk	Branch	Code that identifies the branch.
Branch Name	BranchCodes	Name	Name of the branch.

### Care and Hardship

Care and Hardship conditions allow you to query accounts based on care and financial hardship criteria.

Condition	Table	Column	Description
AudioFiles	CareAndHardship	AudioFiles	Customer required use of audio when contacting the customer.
Braille	CareAndHardship	Braille	Customer required braille when contacting the customer.
CareProofReceived	CareAndHardship	CareProofReceived	Your organization received proof of the care issue.

<b>Condition</b>	<b>Table</b>	<b>Column</b>	<b>Description</b>
CareProofRequested	CareAndHardship	CareProofRequested	Your organization requested proof of the care issue.
CareTypeCode	CareAndHardship	CareTypeCode	Code that identifies the type of care.
CareTypeSeverity	CareType	Severity	Level of severity (1-10) for the care type.
ClosedDate	CareAndHardship	ClosedDate	Date that your organization closed the care issue.
Comment	CareAndHardship	Comment	Comment regarding the care issue.
Confirmed	CareAndHardship	Confirmed	Your organization confirmed the care issue.
Consent	CareAndHardship	Consent	Your organization has consent from the customer to discuss the customer's care information.
ContactEmail	CareAndHardship	ContactEmail	Your organization can send an email message regarding the care issue to the customer.
ContactFax	CareAndHardship	ContactFax	Your organization can send a fax regarding the care issue to the customer.
ContactLetter	CareAndHardship	ContactLetter	Your organization can send a letter regarding the care issue to the customer.
ContactSMS	CareAndHardship	ContactSMS	Your organization can send a text message regarding the care issue to the customer.
ContactTelephone	CareAndHardship	ContactTelephone	Your organization can call the customer regarding the care issue.

Account Analysis Conditions Technical Reference

<b>Condition</b>	<b>Table</b>	<b>Column</b>	<b>Description</b>
CreatedBy	CareAndHardship	CreatedBy	User who added the care or financial hardship case.
CreatedWhen	CareAndHardship	CreatedWhen	Date that the user added the care or financial hardship case.
DDANote	CareAndHardship	DDANote	Note regarding the Disability Discrimination Act.
FinancialHardship	CareAndHardship	FinancialHardship	Type of financial hardship case.
FinancialHardshipCode	CareAndHardship	FinancialHardshipCode	Code that identifies the financial hardship case.
HardshipProofReceived	CareAndHardship	HardshipProofReceived	Your organization received proof of the financial hardship.
HardshipProofRequested	CareAndHardship	HardshipProofRequested	Your organization requested proof of the financial hardship.
HoldDays	CareAndHardship	HoldDays	Number of days to place the account on hold to suspend collection activity.
HoldDaysApproved	CareAndHardship	HoldDaysApproved	Supervisor approved the number of hold days.
HoldDaysNeedApproval		Calculated	Account needs supervisor approval.
HoldExpirationDate	CareAndHardship	HoldExpirationDate	Date that the account hold expires and Latitude removes the hold on the account.
LargePrint	CareAndHardship	LargePrint	Customer requires large print when contacting the customer.
ModifiedBy	CareAndHardship	ModifiedBy	User who modified the care or financial hardship case.
ModifiedWhen	CareAndHardship	ModifiedWhen	Date the user modified the care or financial hardship case.

Condition	Table	Column	Description
Status	CareAndHardship	Status	Status of the care or financial hardship case.
TimesInCare		Calculated	Number of times the customer has been in care.

## Complaint

Complaint conditions allow you to query accounts based on complaint criteria.

Condition	Table	Column	Description
Against	Complaint	Against	Who or what the complaint is against.
AgainstType	Complaint	AgainstType	Category for who or what the complaint is against, such as third party, branch, department, or user.
Category	Complaint	Category	Complaint category, such as branch or department.
CompensationAmount	Complaint	CompensationAmount	Amount of compensation the customer receives.
Complaint Priority	ComplaintCategory	Priority	Priority level that determines when the Complaint Department works the complaint.
Complaint Status	Complaint	Status	Status of the complaint.
Complaint Status Code	Complaint	Status	Code that identifies the complaint status.

Account Analysis Conditions Technical Reference

<b>Condition</b>	<b>Table</b>	<b>Column</b>	<b>Description</b>
Complaint Type	Complaint	Type	Type of complaint, such as human or system error.
ComplaintId	Complaint	ComplaintID	Code that identifies the complaint.
Conclusion	Complaint	Conclusion	Based on the investigation, the conclusion regarding the complaint.
CreatedBy	Complaint	CreatedBy	User who added the complaint.
CreatedWhen	Complaint	CreatedWhen	Date that the user added the complaint.
Date Processed	Complaint	DateInAdmin	Date that your organization processed the complaint.
DateClosed	Complaint	DateClosed	Date that your organization closed the complaint.
DateReceived	Complaint	DateReceived	Date that your organization received the complaint.
Deleted	Complaint	Deleted	Date that a user deleted the complaint.
Details	Complaint	Details	Detail information regarding the complaint.
Dissatisfaction	Complaint	Dissatisfaction	Customer is dissatisfied.



Condition	Table	Column	Description
DissatisfactionDate	Complaint	DissatisfactionDate	Date the customer became dissatisfied.
Greivances	Complaint	Greivances	List of the customer's greivances.
InvestigationCommentsToDate	Complaint	InvestigationCommentsToDate	Information regarding the complaint investigation from the beginning to the current date.
Justified	Complaint	Justified	Complaint is justified.
ModifiedBy	Complaint	ModifiedBy	User who modified the complaint.
ModifiedWhen	Complaint	ModifiedWhen	Date that the user modified the complaint.
Outcome	Complaint	Outcome	Outcome of the complaint, such as training required or disciplinary action.
Owner	Complaint	Owner	Complaint department staff assigned to the complaint.
RecourseDate	Complaint	RecourseDate	Recourse approval date.
ReferredBy	Complaint	ReferredBy	Person who referred the complaint, such as third party, client, or user.
RootCause	Complaint	RootCause	Root cause of the complaint.
SLA Days Remaining		Calculated	Number of days remaining until you

Condition	Table	Column	Description
			breach the Service Level Agreement (SLA).
SLADays	Complaint	SLADays	Number of days after receiving the complaint to resolve it before breaching the SLA.

### Credit Bureau Reporting

#### Credit Bureau Reporting

Credit Bureau Reporting conditions allow you to query accounts based on reporting criteria.

Condition	Table	Column	Description
Account Reporting Prevented?	Master	CBRPrevent	System configuration prevents or allows reporting the account to credit bureaus.

#### CbrDataPaidByInsurance

cbrDataPaidByInsurance conditions allow you to query medical accounts that insurance paid.

Condition	Table	Column	Description
AccountID	Master	AccountID	Code that your organization assigned to identify the account.
AcctState	Master	AcctState	Account reporting state, such as "Pending Delete" or "Reported Delete."
DebtorID	Master	DebtorID	Code that Latitude assigned to identify the primary debtor on the account.

#### CbrDataPendingExceptionDtlv

cbrDataPendingExceptionDtlv conditions allow you to query accounts based on credit reporting exceptions.

Condition	Table	Column	Description
AccountID	Master	AccountID	Code that your organization assigned to identify the account.

Condition	Table	Column	Description
DebtorID	Master	DebtorID	Code that Latitude assigned to identify the primary debtor on the account.
Error	Master	Error	Exception that keeps an account or debtor from reporting.

## Customer

Customer conditions allow you to query accounts based on customer-based criteria.

Condition	Table	Column	Description
Class of Business	Customer	COB	Class of business associated to the account.
Customer	Master	Customer	Customer associated to the account.
Customer Alpha Code	Customer	AlphaCode	Code that identifies the customer associated to the account.
Customer Branch	Master	CustBranch	Branch assigned to the account.
Customer Code	Master	Customer	Code that identifies the customer on the account.
Customer District	Master	CustDistrict	District assigned to the account.
Customer Division	Master	CustDivision	Division assigned to the account.
Customer Group	Fact	CustomGroupID	Customer group assigned to the account.
Customer Name	Customer	Name	Name of the customer associated to the account.
Customer Salesman	Customer	SalesmanCode	Salesman on the account.

## Desk

### Desk

Desk conditions allow you to query accounts based on assigned desks.

Condition	Table	Column	Description
Desk	Master	Desk	Desk assigned to the account.
Desk 1	Master	Desk1	Desk 1 assigned to the account.
Desk Code	Master	Desk	Code that identifies the desk assigned to the account.
Desk Name	Desk	Name	Name of the desk assigned to the account.
Desk Type	Desk	DeskType	Type of desk assigned to the account.

### Desk History

Desk History conditions allow you to query accounts based on desk assignment history.

Condition	Table	Column	Description
Desk Change Date	DeskChangeHistory	DMDDateStamp	Date that the desk assignment changed.
Desk Changed By User	DeskChangeHistory	User	User who changed the desk assignment.
First Desk	Master	FirstDesk	First desk assigned to the account.
Last Desk Change Date	DeskChangeHistory	DMDDateStamp	Last date that the desk assignment changed.
New Desk	DeskChangeHistory	NewDesk	New desk assigned to the account.
Old Desk	DeskChangeHistory	OldDesk	Old desk assigned to the account
Previous Desk	DeskChangeHistory	OldDesk	Previous desk assigned to the account

## Dispute

Dispute conditions allow you to query accounts based on dispute conditions.

<b>Condition</b>	<b>Table</b>	<b>Column</b>	<b>Description</b>
Against	Dispute	Against	Person that the dispute relates to, such as client or third party.
Category	Dispute	Category	Dispute category, such as fraud or wrong trace.
CreatedBy	Dispute	CreatedBy	User or system that created the dispute.
CreatedWhen	Dispute	CreatedWhen	Date the user or system created the dispute.
DateClosed	Dispute	DateClosed	Date your organization closed the dispute.
DateReceived	Dispute	DateReceived	Date your organization received the dispute.
Deleted	Dispute	Deleted	Your organization did or didn't delete the dispute.
Details	Dispute	Details	Details of the dispute.
DisputeId	Dispute	DisputeID	Unique code that Latitude assigns to identify the dispute.
DocumentationId	Dispute	DocumentationID	Code that identifies the dispute documentation.
InsufficientProofReceived	Dispute	InsufficientProofReceived	Your organization did or didn't receive insufficient proof of the dispute.
Justified	Dispute	Justified	Dispute is justified.
ModifiedBy	Dispute	ModifiedBy	User who modified the dispute.
ModifiedWhen	Dispute	ModifiedWhen	Date the user modified the dispute.
Outcome	Dispute	Outcome	Outcome of the dispute, such as account on hold or unable to resolve.
ProofReceived	Dispute	ProofReceived	Your organization did or didn't receive proof of the dispute.

Condition	Table	Column	Description
ProofRequested	Dispute	ProofRequested	Your organization did or didn't request proof of the dispute.
ProofRequired	Dispute	ProofRequired	Your organization requires proof of the dispute.
RecourseDate	Dispute	RecourseDate	Recourse approval date.
ReferredBy	Dispute	ReferredBy	Person who referred the dispute, such as a third party or client.
Type	Dispute	Type	Type of dispute, such as possible fraud or incorrect trace.

### Income and Expense

Income and Expense conditions allow you to query accounts based on income and expenditure criteria.

Condition	Table	Column	Description
LastUpdated	IncomeAndExpense	LastUpdated	Date the user last updated the income and expense information.
MonthlyDisposableIncome	IncomeAndExpense	MonthlyDisposableIncome	Amount of monthly disposable income.

### Queue

#### Queue

Queue conditions allow you to query accounts based on work queue criteria.

Condition	Table	Column	Description
Account Can Queue?	Master	ShouldQueue	Account can or cannot queue.
Custom Queue	TMPCLOSERPT	Number	Custom queue assigned to the account.
Queue Date	Master	Qdate	Date the account queued.

Condition	Table	Column	Description
Queue Level	Master	Qlevel	Queue level assigned to the account.
Should Queue?	Master	ShouldQueue	Account should or shouldn't queue.
Support Queue?	SupportQueueItems	QueueType	Account is in a support queue currently.

### Support Queue Items

Support Queue Items conditions allow you to query accounts based on Support queue criteria.

Condition	Table	Column	Description
Support Added Date	SupportQueueItems	DateAdded	Date that the system added an account to a support queue.
Support Due Date	SupportQueueItems	DateDue	Date that support is due to work the account.
Support Queue Comment	SupportQueueItems	Comment	Comment regarding the account to assist support.
Support Queue Level	SupportQueueItems	QueueCode	Support queue level assigned to the account.
Support Queue Type	SupportQueueItems	QueueType	Support queue type assigned to the account.
Support Queue User Name	Users	UserName	User name associated to the support queue.
Support Should Queue?	SupportQueueItems	ShouldQueue	Account should or shouldn't queue to a support queue.

### Status

#### Status

Status conditions allow you to query accounts based on account status criteria.

## Account Analysis Conditions Technical Reference

Condition	Table	Column	Description
Status	Master	Status	Status of the account.
Status Affects Case Count?	Status	CaseCount	Account status counts against a desk's case limit.
Status Code	Master	Status	Code that identifies the account status.
Status Description	Status	Description	Description of the account status.
Status Reduces Statistics?	Status	ReduceStats	Account status reduces the number of account placements.

### Status History

Status History conditions allow you to query accounts based on account status history criteria.

Condition	Table	Column	Description
Last Status Change Date	StatusHistory	DateChanged	Last date that the account status changed.
New Status	StatusHistory	NewStatus	New account status.
Old Status	StatusHistory	OldStatus	Original account status.
Previous Status	StatusHistory	OldStatus	Previous account status.
Status Change Date	StatusHistory	DateChanged	Date that the account status changed.
Status Changed By User	StatusHistory	UserName	User who changed the status assignment.

### AIM

### AIM

AIM conditions allow you to query accounts based on Agency Interface Manager (AIM) account criteria.



<b>Condition</b>	<b>Table</b>	<b>Column</b>	<b>Description</b>
AIM Assigned	Master	AIMAgency	Outside collection agency or attorney holds the account.
AIM Currently Placed Alpha Code	AIM_Agency	AlphaCode	Code that identifies the outside collection agency or attorney that holds the account currently.
AIM Currently Placed Name	AIM_Agency	AgencyID	Name of the outside collection agency or attorney that holds the account currently.
Commission rate on account	AIM_AccountReference	CurrentCommissionPercentage	Commission rate that the outside collection agency or attorney receives.
Current Agency Name	AIM_Agency	Name	Name of the outside collection agency or attorney that holds the account currently.
Never Placed with Agency	AIM_AccountTransaction	AgencyID	Outside collection agency or attorney to which a user never placed the account.
Number of time(s) the account has been placed		Calculated	Number of times a user placed the account.
Past Agency Names	AIM_Agency	Name	Name of the outside collection agency or attorney where a user placed the account in the past.
Past Agency placement dates	AIM_AccountTransaction	CompletedDateTime	Date that the user placed the account with an outside collection agency or attorney in the past.
Pending placement?		Calculated	Account is pending placement with an outside collection agency or attorney.

## Account Analysis Conditions Technical Reference

Condition	Table	Column	Description
Was not Ever Placed with Agency	AIM_AccountTransaction	AgencyID	User never placed the account with an outside collection agency or attorney.

### AIM\_AccountReference

AIM\_AccountReference conditions allow you to query accounts based on AIM placement and recall criteria.

Condition	Table	Column	Description
AcknowledgementError	AIM_AccountReference	AcknowledgementError	An error occurred when importing account placement acknowledgments.
AgencyAcknowledgement	AIM_AccountReference	AgencyAcknowledgement	Outside collection agency or attorney submitted an account placement acknowledgment.
CurrentCommission Percentage	AIM_AccountReference	CurrentCommission Percentage	Commission rate that the outside collection agency or attorney receives currently.
CurrentlyPlacedAgencyId	AIM_AccountReference	CurrentlyPlacedAgencyID	Outside collection agency or attorney that holds the account currently.
ExpectedFinalRecallDate	AIM_AccountReference	ExpectedFinalRecallDate	Expected final recall date.
ExpectedPendingRecall Date	AIM_AccountReference	ExpectedPendingRecall Date	Expected pending recall date.
FeeSchedule	AIM_AccountReference	FeeSchedule	Fee scheduled used to determine the commission that the outside

Condition	Table	Column	Description
			collection agency or attorney receives.
IsPlaced	AIM_AccountReference	IsPlaced	Account is placed with an outside collection agency or attorney.
LastPlacementDate	AIM_AccountReference	LastPlacementDate	Last account placement date.
LastRecallDate	AIM_AccountReference	LastRecallDate	Last account recall date.
NumDaysPlacedAfter Pending	AIM_AccountReference	NumDaysPlacedAfter Pending	Number of days after the pending recall date that the outside collection agency or attorney held the account.
NumDaysPlacedBefore Pending	AIM_AccountReference	NumDaysPlacedBefore Pending	Number of days before the pending recall date that the outside collection agency or attorney held the account.
ObjectionFlag	AIM_AccountReference	ObjectionFlag	Account does or doesn't have an objection to future pending and final recalls.
RecallDesk	AIM_AccountReference	RecallDesk	Desk to which to assign the account upon recall.

### AIM\_AccountTransaction

#### AIM\_AccountTransaction

AIM\_AccountTransaction conditions allow you to query accounts based on AIM account transaction criteria.

## Account Analysis Conditions Technical Reference

Condition	Table	Column	Description
Transaction Additional Error Comment	AIM_AccountTransaction	Comment	Comment regarding the transaction error.
Transaction Agency Alpha Code	AIM_Agency	AgencyID	Code that identifies the outside collection agency or attorney that submitted a transaction.
Transaction Agency Name	AIM_Agency	AgencyID	Name of the outside collection agency or attorney that submitted a transaction.
Transaction Agency Tier	AIM_Agency	AgencyTier	Transaction agency tier (placement type).
Transaction Date and Time	AIM_AccountTransaction	CompletedDateTime	Date and time the transaction occurred.
Transaction Log Message	AIM_LogMessage	LogMessageID	Message recorded in the transaction log.
Transaction Status	AIM_TransactionStatusType	TransactionStatusTypeID	Status of the transaction.
Transaction Type	AIM_TransactionType	TransactionTypeID	Type of transaction.

### Close Files (ACLS)

Close Files (ACLS) conditions allow you to query accounts based on AIM account closures.

Condition	Table	Column	Description
Close Code		Calculated	Code that identifies the reason the outside collection agency or attorney closed the account.
Close Date		Calculated	Date that the outside collection agency or attorney closed the account.

### Objection Files (AOBJ)

Objection Files (AOBJ) conditions allow you to query accounts based on AIM recall objections.

Condition	Table	Column	Description
Objection Code		Calculated	Code that identifies the reason the outside collection agency or attorney objects to the pending or final recall.
Objection Date		Calculated	Date that the outside collection agency or attorney objected to the pending or final recall.

### Payment Files (APAY)

Payment Files (APAY) conditions allow you to query accounts based on AIM payment transactions.

Condition	Table	Column	Description
Payment Date		Calculated	Date that the outside collection agency or attorney received payment.
Payment Type		Calculated	Type of payment the outside collection agency or attorney received.

### Recall Files (CRCL)

Recall Files (CRCL) conditions allow you to query accounts based on AIM account recalls.

Condition	Table	Column	Description
Pending or Final	AIM_AccountTransaction	TransactionTypeID	Account is flagged for pending or final recall.
Recall Reason Code	AIM_AccountTransaction	RecallReasonCodeID	Reason for the pending or final recall.

### AIM\_BatchFileHistory

AIM\_BatchFileHistory conditions allow you to query accounts based on AIM placement batches.

Condition	Table	Column	Description
BatchFileType	AIM_BatchFileHistory	BatchFileTypeID	Type of placement batch.

## Arrangements

Arrangements conditions allow you to query accounts based on payment arrangement criteria.

Condition	Table	Column	Description
Needs Review	Arrangements	ReviewFlag	Indicates whether an arrangement with active payments needs reviewed.

## Care and Hardship

Care and Hardship conditions allow you to query accounts based on care and financial hardship criteria.

Condition	Table	Column	Description
AudioFiles	CareAndHardship	AudioFiles	Customer required use of audio when contacting the customer.
Braille	CareAndHardship	Braille	Customer required braille when contacting the customer.
CareProofReceived	CareAndHardship	CareProofReceived	Your organization received proof of the care issue.
CareProofRequested	CareAndHardship	CareProofRequested	Your organization requested proof of the care issue.
CareTypeCode	CareAndHardship	CareTypeCode	Code that identifies the type of care.
CareTypeSeverity	CareType	Severity	Level of severity (1-10) for the care type.
ClosedDate	CareAndHardship	ClosedDate	Date that your organization closed the care issue.
Comment	CareAndHardship	Comment	Comment regarding the care issue.
Confirmed	CareAndHardship	Confirmed	Your organization confirmed the care issue.
Consent	CareAndHardship	Consent	Your organization has consent from the customer to discuss

<b>Condition</b>	<b>Table</b>	<b>Column</b>	<b>Description</b>
			the customer's care information.
ContactEmail	CareAndHardship	ContactEmail	Your organization can send an email message regarding the care issue to the customer.
ContactFax	CareAndHardship	ContactFax	Your organization can send a fax regarding the care issue to the customer.
ContactLetter	CareAndHardship	ContactLetter	Your organization can send a letter regarding the care issue to the customer.
ContactSMS	CareAndHardship	ContactSMS	Your organization can send a text message regarding the care issue to the customer.
ContactTelephone	CareAndHardship	ContactTelephone	Your organization can call the customer regarding the care issue.
CreatedBy	CareAndHardship	CreatedBy	User who added the care or financial hardship case.
CreatedWhen	CareAndHardship	CreatedWhen	Date that the user added the care or financial hardship case.
DDANote	CareAndHardship	DDANote	Note regarding the Disability Discrimination Act.
FinancialHardship	CareAndHardship	FinancialHardship	Type of financial hardship case.
FinancialHardshipCode	CareAndHardship	FinancialHardshipCode	Code that identifies the financial hardship case.
HardshipProofReceived	CareAndHardship	HardshipProofReceived	Your organization received proof of the financial hardship.
HardshipProofRequested	CareAndHardship	HardshipProofRequested	Your organization requested proof of the financial hardship.

## Account Analysis Conditions Technical Reference

Condition	Table	Column	Description
HoldDays	CareAndHardship	HoldDays	Number of days to place the account on hold to suspend collection activity.
HoldDaysApproved	CareAndHardship	HoldDaysApproved	Supervisor approved the number of hold days.
HoldDaysNeedApproval		Calculated	Account needs supervisor approval.
HoldExpirationDate	CareAndHardship	HoldExpirationDate	Date that the account hold expires and Latitude removes the hold on the account.
LargePrint	CareAndHardship	LargePrint	Customer requires large print when contacting the customer.
ModifiedBy	CareAndHardship	ModifiedBy	User who modified the care or financial hardship case.
ModifiedWhen	CareAndHardship	ModifiedWhen	Date the user modified the care or financial hardship case.
Status	CareAndHardship	Status	Status of the care or financial hardship case.
TimesInCare		Calculated	Number of times the customer has been in care.

## Complaint

Complaint conditions allow you to query accounts based on complaint criteria.

Condition	Table	Column	Description
Against	Complaint	Against	Who or what the complaint is against.
AgainstType	Complaint	AgainstType	Category for who or what the complaint is against, such as third party, branch, department, or user.



<b>Condition</b>	<b>Table</b>	<b>Column</b>	<b>Description</b>
Category	Complaint	Category	Complaint category, such as branch or department.
CompensationAmount	Complaint	CompensationAmount	Amount of compensation the customer receives.
Complaint Priority	ComplaintCategory	Priority	Priority level that determines when the Complaint Department works the complaint.
Complaint Status	Complaint	Status	Status of the complaint.
Complaint Status Code	Complaint	Status	Code that identifies the complaint status.
Complaint Type	Complaint	Type	Type of complaint, such as human or system error.
ComplaintId	Complaint	ComplaintID	Code that identifies the complaint.
Conclusion	Complaint	Conclusion	Based on the investigation, the conclusion regarding the complaint.
CreatedBy	Complaint	CreatedBy	User who added the complaint.
CreatedWhen	Complaint	CreatedWhen	Date that the user added the complaint.
Date Processed	Complaint	DateInAdmin	Date that your organization processed the complaint.

Account Analysis Conditions Technical Reference

<b>Condition</b>	<b>Table</b>	<b>Column</b>	<b>Description</b>
DateClosed	Complaint	DateClosed	Date that your organization closed the complaint.
DateReceived	Complaint	DateReceived	Date that your organization received the complaint.
Deleted	Complaint	Deleted	Date that a user deleted the complaint.
Details	Complaint	Details	Detail information regarding the complaint.
Dissatisfaction	Complaint	Dissatisfaction	Customer is dissatisfied.
DissatisfactionDate	Complaint	DissatisfactionDate	Date the customer became dissatisfied.
Greivances	Complaint	Greivances	List of the customer's greivances.
InvestigationCommentsToDate	Complaint	InvestigationCommentsToDate	Information regarding the complaint investigation from the beginning to the current date.
Justified	Complaint	Justified	Complaint is justified.
ModifiedBy	Complaint	ModifiedBy	User who modified the complaint.
ModifiedWhen	Complaint	ModifiedWhen	Date that the user modified the complaint.
Outcome	Complaint	Outcome	Outcome of the complaint, such as

Condition	Table	Column	Description
			training required or disciplinary action.
Owner	Complaint	Owner	Complaint department staff assigned to the complaint.
RecourseDate	Complaint	RecourseDate	Recourse approval date.
ReferredBy	Complaint	ReferredBy	Person who referred the complaint, such as third party, client, or user.
RootCause	Complaint	RootCause	Root cause of the complaint.
SLA Days Remaining		Calculated	Number of days remaining until you breach the Service Level Agreement (SLA).
SLADays	Complaint	SLADays	Number of days after receiving the complaint to resolve it before breaching the SLA.

## Debt Forwarding

### Debt Forwarding

Debt Forwarding conditions allow you to query accounts based on debt forwarding criteria.

Condition	Table	Column	Description
Currently Placed Agency Name	AIM_Agency	AgencyID	Name of the outside collection agency or attorney where the account is placed currently.

Condition	Table	Column	Description
Is Currently Outsourced?	AIM_AccountReference	AIMCurrentlyPlacedAgencyID	Account is placed with an outside collection agency or attorney currently.

### Placement History

Placement History conditions allow you to query accounts based on tier 1 account placement history.

Condition	Table	Column	Description
Tier 1 Agency Name	AIM_AccountReference	Tier1	Name of the tier 1 outside collection agency or attorney where the account is placed.

### Tiers

Tiers conditions allow you to query accounts based on account tier levels.

Condition	Table	Column	Description
Current Tier	AIM_Agency	AgencyTier	Current tier level.
Last Tier	AIM_AccountReference	LastTier	Last tier level.

### Debt Purchasing

Debt Purchasing conditions allow you to query accounts based on debt purchasing criteria.

Condition	Table	Column	Description
Purchased Portfolio Name	Master	PurchasedPortfolio	Name of the portfolio that your organization purchased.
Sold Portfolio Name	Master	SoldPortfolio	Name of the portfolio that your organization sold.

### Debtor Demographics

#### Debtor Demographics

Debtor Demographics conditions allow you to query accounts based on debtor demographic criteria.

Condition	Table	Column	Description
Date of Birth	Debtors	DOB	Debtor's date of birth.
Debtor Memo	Debtors	DebtorMemo	Comment regarding the debtor.
Debtor Relationship	Debtors	Relationship	Debtor's relationship to the account.
Debtor Sequence Number	Debtors	Seq	Code that identifies debtor responsibility.
Driver License ID	Debtors	DLNum	Debtor's drivers license number.
Email Address	Debtors	Email	Debtor's email address.
Is Debtor Responsible?	Debtors	Responsible	Debtor is responsible for the debt.
Is Primary Debtor?	Debtors	Seq	Debtor is the primary debtor on the account.
Language	Debtors	Language	Debtor's native language.
Name	Debtors	Name	Debtor's full name.
Other Name	Debtors	OtherName	Other name the debtor is known as.
SSN	Debtors	SSN	Debtor's social security number.

## Address

### Address

Address conditions allow you to query accounts based on debtor address criteria.

Condition	Table	Column	Description
City	Debtors	City	Debtor's city.
County	Debtors	County	Debtor's county.
Good Address?	Debtors		Debtor's address is good.

Condition	Table	Column	Description
State	Debtors	State	Debtor's state.
Street 1	Debtors	Street1	Debtor's street address line 1.
Street 2	Debtors	Street2	Debtor's street address line 2.
Time Zone	DebtorsTimeZones	TimeZone	Debtor's time zone.
Zip Code	Debtors	ZIPCode	Debtor's postal code.

### Address History

Address History conditions allow you to query accounts based on debtor address history criteria.

Condition	Table	Column	Description
Address Changed Date	AddressHistory	DateChanged	Date that the debtor's address changed.
Address Changed User	AddressHistory	UserChanged	User who changed the debtor's address.
Address Changed User Code	AddressHistory	UserChanged	Code that identifies the user who changed the debtor's address.
New City	AddressHistory	NewCity	Debtor's current city.
New State	AddressHistory	NewState	Debtor's current state.
New Street 1	AddressHistory	NewStreet1	Debtor's current street address line 1.
New Street 2	AddressHistory	NewStreet2	Debtor's current street address line 2.
New Zip Code	AddressHistory	NewZIPCode	Debtor's current postal code.
Old City	AddressHistory	OldCity	Debtor's previous city.
Old State	AddressHistory	OldState	Debtor's previous state.
Old Street 1	AddressHistory	OldStreet1	Debtor's previous street address line 1
Old Street 2	AddressHistory	OldStreet2	Debtor's previous street address line 2.

Condition	Table	Column	Description
Old Zip Code	AddressHistory	OldZIPCode	Debtor's previous postal code.

### Bank Information

Bank Information conditions allow you to query accounts based on banking criteria.

Condition	Table	Column	Description
ABA Number	DebtorBankInfo	ABANumber	American Bankers Association code (routing number) that identifies a financial institution.
Account Number	DebtorBankInfo	AccountNumber	Financial institution account number.
Account Type	DebtorBankInfo	AccountType	Type of financial account, such as a checking or savings.
Bank Name	DebtorBankInfo	BankName	Name of the financial institution.
Has Bank Information?	DebtorBankInfo	AcctID	Debtor has banking information.

### Bankruptcy

Bankruptcy conditions allow you to query accounts based on bankruptcy criteria.

Condition	Table	Column	Description
AccountID	Bankruptcy	AccountID	Code that your organization assigned to identify the account.
CaseNumber	Bankruptcy	CaseNumber	Case number the court assigned to the bankruptcy.
Chapter	Bankruptcy	Chapter	Bankruptcy chapter number.
Comments	Bankruptcy	Comments	Comment regarding the bankruptcy.
ConfirmationHearingDate	Bankruptcy	ConfirmationHearingDate	Date the court set the confirmation hearing.
ConvertedFrom	Bankruptcy	ConvertedFrom	Original bankruptcy chapter number.

Account Analysis Conditions Technical Reference

<b>Condition</b>	<b>Table</b>	<b>Column</b>	<b>Description</b>
CourtCity	Bankruptcy	CourtCity	Bankruptcy court city.
CaseDistrict	Bankruptcy	CaseDistrict	Bankruptcy court district.
CourtDivision	Bankruptcy	CourtDivision	Bankruptcy court division.
CourtPhone	Bankruptcy	CourtPhone	Bankruptcy court phone.
CourtState	Bankruptcy	CourtState	Bankruptcy court state.
CourtStreet1	Bankruptcy	CourtStreet1	First line of the bankruptcy court's street address.
CourtStreet2	Bankruptcy	CourtStreet2	Second line of the bankruptcy court's street address.
CourtZipcode	Bankruptcy	CourtZipcode	Bankruptcy court postal code.
DateFiled	Bankruptcy	DateFiled	Date the debtor filed the case with the bankruptcy court.
DateNotice	Bankruptcy	DateNotice	Date the customer received a notice that the customer filed for bankruptcy.
DateTime341	Bankruptcy	DateTime341	Date and time of the creditor meeting, also known as the 341 hearing.
DebtorID	Bankruptcy	DebtorID	Code that Latitude assigned to identify the primary debtor on the account.
DischargeDate	Bankruptcy	DischargeDate	Date the court discharged the bankruptcy.
Dismissaldate	Bankruptcy	DismissalDate	Date the court dismissed the bankruptcy.
Has341Info	Bankruptcy	Has341Info	Debtor has documentation required for the creditor meeting.
Location341	Bankruptcy	Location341	Location of the creditor meeting.
ProofFiled	Bankruptcy	ProofFiled	Date the customer filed a proof of claim with the court.



Condition	Table	Column	Description
Status	Bankruptcy	Status	Status of the bankruptcy.
TransmittedDate	Bankruptcy	TransmittedDate	Date AIM or another interface transmitted the bankruptcy information.
Trustee	Bankruptcy	Trustee	Trustee's name.
TrusteeCity	Bankruptcy	TrusteeCity	Trustee's city.
TrusteePhone	Bankruptcy	TrusteePhone	Trustee's phone.
TrusteeState	Bankruptcy	TrusteeState	Trustee's state.
TrusteeStreet1	Bankruptcy	TrusteeStreet1	First line of the trustee's street address.
TrusteeStreet2	Bankruptcy	TrusteeStreet2	Second line of the trustee's street address.
TrusteeZipcode	Bankruptcy	TrusteeZipcode	Trustee's postal code.

### Credit Bureau Reporting

Credit Bureau Reporting conditions allow you to query accounts based on credit bureau reporting criteria.

Condition	Table	Column	Description
Debtor Excluded From Reporting?	Debtors	CBRExclude	Debtor is or isn't excluded from credit bureau reporting.
Debtor Reporting Prevented?	Master	CBRPrevent	Debtor is or isn't prevented from credit bureau reporting for a specific number of days.

### Employer

Employer conditions allow you to query accounts based on criteria for a debtor's employer.

Condition	Table	Column	Description
Employer City, State, Zip	Debtors	JobCSZ	Employer's city, state, and postal code.

Condition	Table	Column	Description
Employer Comment	Debtors	JobMemo	Comment regarding the employer.
Employer Name	Debtors	JobName	Employer's name.
Employer Street 1	Debtors	JobAddr1	First line of the employer's street address.
Employer Street 2	Debtors	JobAddr2	Second line of the employer's street address.
Has Job?	Debtors	JobName	Debtor has a job.

## Phone Numbers

### Phone Numbers

Phone Numbers conditions allow you to query accounts based on phone number criteria.

Condition	Table	Column	Description
Fax Phone Number	Debtors	Fax	Person's fax number.
Good Phone Number?		Calculated	Person has a good home or work phone number.
Home Phone Number	Debtors	HomePhone	Person's home phone number.
Pager Phone Number	Debtors	Pager	Person's pager number.
Spouse Home Phone Number	Debtors	SpouseHomePhone	Spouse's home phone number.
Spouse Work Phone Number	Debtors	SpouseWorkPhone	Spouse's work phone number.
Work Phone Number	Debtors	WorkPhone	Person's work phone number.

## Phone History

Phone History conditions allow you to query accounts based on phone history criteria.

Condition	Table	Column	Description
Last Home Phone Number	PhoneHistory	OldNumber	Person's last home phone number.
Last Work Phone Number	PhoneHistory	OldNumber	Person's last work phone number.
New Number	PhoneHistory	NewNumber	Person's new home phone number.
Old Number	PhoneHistory	OldNumber	Person's old home phone number.
Phone Changed Date	PhoneHistory	DateChanged	Date the person's phone number changed.
Phone Changed User	PhoneHistory	UserChanged	User who changed the person's phone number.
Phone Changed User Code	PhoneHistory	UserChanged	Code that identifies the user who changed the person's phone number.
Phone Type	PhoneHistory	PhoneType	Type of phone number.

### Phone\_Panel

Phone\_Panel conditions allow you to query accounts based on Phone panel criteria.

Condition	Table	Column	Description
Cell Phone Number	Phones_Master	PhoneNumber	Person's cell phone number.
Fax Phone Number	Phones_Master	PhoneNumber	Person's fax number.
Good Home Phone Number?	Phones_Statuses	Active	Person's home phone number is good.
Good Number?	Phones_Statuses	Active	Person's phone number is good.
Good Work Phone Number?	Phones_Statuses	Active	Person's work phone number is good.

Condition	Table	Column	Description
Home Phone Number	Phones_Master	PhoneNumber	Person's home phone number.
No Good Phone Number?	Phones_Statuses	Active	Person doesn't have any good phone numbers.
Search All Phone Numbers for an account?	Phones_Master	PhoneNumber	Search for a specific phone number in all phone numbers associated to an account.
Spouse Home Phone Number	Phones_Master	PhoneNumber	Spouse's home phone number.
Spouse Work Phone Number	Phones_Master	PhoneNumber	Spouse's work phone number.
Work Phone Number	Phones_Master	PhoneNumber	Person's work phone number.

## Spouse

### Spouse

Spouse conditions allow you to query accounts based on criteria for a debtor's spouse.

Condition	Table	Column	Description
Has Spouse?	Debtors	Spouse	Debtor has a spouse.
Spouse Name	Debtors	Spouse	Spouse's name.
Spouse Responsible?	Debtors	SpouseResponsible	Spouse is a responsible party on the account.

## Employer

Employer conditions allow you to query accounts based on criteria for a spouse's employer.

Condition	Table	Column	Description
Spouse Employer City, State, Zip	Debtors	SpouseJobCSZ	Employer's city, state, and postal code.

Condition	Table	Column	Description
Spouse Employer Comment	Debtors	SpouseJobMemo	Comment regarding the employer.
Spouse Employer Name	Debtors	SpouseJobName	Employer's name.
Spouse Employer Street 1	Debtors	SpouseJobAddr1	First line of the employer's street address.
Spouse Employer Street 2	Debtors	SpouseAddr2	Second line of the employer's street address.

## Dialers

Dialers conditions allow you to query accounts based on dialer criteria.

Condition	Table	Column	Description
ListBuilder Option Select	ListBuilderOptionSelectList	Code	

## Dispute

Dispute conditions allow you to query accounts based on dispute conditions.

Condition	Table	Column	Description
Against	Dispute	Against	Person that the dispute relates to, such as client or third party.
Category	Dispute	Category	Dispute category, such as fraud or wrong trace.
CreatedBy	Dispute	CreatedBy	User or system that created the dispute.
CreatedWhen	Dispute	CreatedWhen	Date the user or system created the dispute.

Account Analysis Conditions Technical Reference

<b>Condition</b>	<b>Table</b>	<b>Column</b>	<b>Description</b>
DateClosed	Dispute	DateClosed	Date your organization closed the dispute.
DateReceived	Dispute	DateReceived	Date your organization received the dispute.
Deleted	Dispute	Deleted	Your organization did or didn't delete the dispute.
Details	Dispute	Details	Details of the dispute.
DisputeId	Dispute	DisputeID	Unique code that Latitude assigns to identify the dispute.
DocumentationId	Dispute	DocumentationID	Code that identifies the dispute documentation.
InsufficientProofReceived	Dispute	InsufficientProofReceived	Your organization did or didn't receive insufficient proof of the dispute.
Justified	Dispute	Justified	Dispute is justified.
ModifiedBy	Dispute	ModifiedBy	User who modified the dispute.
ModifiedWhen	Dispute	ModifiedWhen	Date the user modified the dispute.
Outcome	Dispute	Outcome	Outcome of the dispute, such as account on hold or unable to resolve.
ProofReceived	Dispute	ProofReceived	Your organization did or didn't receive proof of the dispute.
ProofRequested	Dispute	ProofRequested	Your organization did or didn't request proof of the dispute.
ProofRequired	Dispute	ProofRequired	Your organization requires proof of the dispute.
RecourseDate	Dispute	RecourseDate	Recourse approval date.
ReferredBy	Dispute	ReferredBy	Person who referred the dispute, such as a third party or client.

Condition	Table	Column	Description
Type	Dispute	Type	Type of dispute, such as possible fraud or incorrect trace.

## Early Stage Data

Early Stage Data conditions are no longer used in Latitude.

## Income and Expense

Income and Expense conditions allow you to query accounts based on income and expenditure criteria.

Condition	Table	Column	Description
LastUpdated	IncomeAndExpense	LastUpdated	Date the user last updated the income and expense information.
MonthlyDisposableIncome	IncomeAndExpense	MonthlyDisposableIncome	Amount of monthly disposable income.

## Latitude Fusion

Latitude Fusion conditions allow you to query accounts based on Fusion service criteria.

Condition	Table	Column	Description
Received Data From Fusion Service	ServiceHistory	XMLInfoReturned	Requested information was or wasn't received from the Fusion service.
Sent to Fusion Service	ServiceHistory	ServiceID	Code that identifies the Fusion service from which you requested information.
Service History Created Date	ServiceHistory	CreationDate	Date the system created the service history record.
Service History File name Lookup	ServiceHistory	FileName	Name of the service history file.

## Legal

### Legal

Legal conditions allow you to query accounts based on legal criteria.

Condition	Table	Column	Description
Attorney Account ID	CourtCases	AttorneyAccountID	Code that Latitude assigned to identify the account.
Case Number	CourtCases	CaseNumber	Case number the court assigned to the bankruptcy.
Court Case MiscInfo 1	CourtCases	MiscInfo1	Miscellaneous information regarding the legal case.
Court Case MiscInfo 2	CourtCases	MiscInfo2	Miscellaneous information regarding the legal case.
Court Room	CourtCases	CourtRoom	Court room where the judge presides.
Defendant	CourtCases	Defendant	Person defending the case. This box defaults to the primary debtor's name.
Judge	CourtCases	Judge	Name of the presiding judge.
Plaintiff	CourtCases	Plaintiff	Person who filed the complaint.
Remarks	CourtCases	Remarks	Comments regarding the legal case.
Service Type	CourtCases	ServiceType	Type of legal service.
Status	CourtCases	Status	Status of the legal case.

## Courts

### Courts

Courts conditions allow you to query accounts based on court criteria.

### Case Court

Case Court conditions allow you to query accounts based on case court criteria.



Condition	Table	Column	Description
Court Address 1	Courts	Address1	Line 1 of the court's address.
Court Address 2	Courts	Address2	Line 2 of the court's address.
Court City	Courts	City	Court's city.
Court Clerk First Name	Courts	ClerkFirstName	Court clerk's first name.
Court Clerk Last Name	Courts	ClerkLastName	Court clerk's last name.
Court Clerk Middle Name	Courts	ClerkMiddleName	Court clerk's middle name.
Court Clerk Salutation	Courts	Salutation	Court clerk's greeting.
Court County	Courts	County	Court's county.
Court Fax	Courts	Fax	Court's fax number.
Court Name	Courts	CourtName	Name of the court.
Court Phone	Courts	Phone	Court's phone number.
Court State	Courts	State	Court's state.
Court Zip Code	Courts	ZipCode	Court's postal code.

### Garnishment Court

Garnishment Court conditions allow you to query accounts based on wage garnishment court criteria.

Condition	Table	Column	Description
Garnishment Court Address 1	GarnishmentCourts	Address1	Line 1 of the garnishment court's address.
Garnishment Court Address 2	GarnishmentCourts	Address2	Line 2 of the garnishment court's address.

## Account Analysis Conditions Technical Reference

Condition	Table	Column	Description
Garnishment Court City	GarnishmentCourts	City	Garnishment court's city.
Garnishment Court Clerk First Name	GarnishmentCourts	ClerkFirstName	Garnishment court clerk's first name.
Garnishment Court Clerk Last Name	GarnishmentCourts	ClerkLastName	Garnishment court clerk's last name.
Garnishment Court Clerk Middle Name	GarnishmentCourts	ClerkMiddleName	Garnishment court clerk's middle name.
Garnishment Court Clerk Salutation	GarnishmentCourts	Salutation	Garnishment court clerk's greeting.
Garnishment Court County	GarnishmentCourts	County	Garnishment court's county.
Garnishment Court Fax	GarnishmentCourts	Fax	Garnishment court's fax number.
Garnishment Court Name	GarnishmentCourts	CourtName	Name of the garnishment court.
Garnishment Court Phone	GarnishmentCourts	Phone	Garnishment court's phone number.
Garnishment Court State	GarnishmentCourts	State	Garnishment court's state.
Garnishment Court Zip Code	GarnishmentCourts	ZipCode	Garnishment court's postal code.

### Judgment Court

Judgment Court conditions allow you to query accounts based on judgment court criteria.

Condition	Table	Column	Description
Judgment Court Address 1	JudgmentCourts	Address1	Line 1 of the judgment court's address.
Judgment Court Address 2	JudgmentCourts	Address2	Line 2 of the judgment court's address.
Judgment Court City	JudgmentCourts	City	Judgment court's city.
Judgment Court Clerk First Name	JudgmentCourts	ClerkFirstName	Judgment court clerk's first name.
Judgment Court Clerk Last Name	JudgmentCourts	ClerkLastName	Judgment court clerk's last name.
Judgment Court Clerk Middle Name	JudgmentCourts	ClerkMiddleName	Judgment court clerk's middle name.
Judgment Court Clerk Salutation	JudgmentCourts	Salutation	Judgment court clerk's greeting.
Judgment Court County	JudgmentCourts	County	Judgment court's county.
Judgment Court Fax	JudgmentCourts	Fax	Judgment court's fax number.
Judgment Court Name	JudgmentCourts	CourtName	Name of the judgment court.
Judgment Court Phone	JudgmentCourts	Phone	Judgment court's phone number.
Judgment Court State	JudgmentCourts	State	Judgment court's state.
Judgment Court Zip Code	JudgmentCourts	ZipCode	Judgment court's postal code.

## Dates

Dates conditions allow you to query accounts based on criteria for legal dates.

Condition	Table	Column	Description
Arbitration Date	CourtCases	ArbitrationDate	Date and time of arbitration.
Attorney Acknowledge Date	CourtCases	AttorneyAckDate	Date the defendant's attorney acknowledged the suit.
Court Date	CourtCases	CourtDate	Date and time of the trial.
Date Answered	CourtCases	DateAnswered	Date the Defendant filed the response to the complaint with the court.
Date Filed	CourtCases	DateFiled	Date the Plaintiff filed the complaint with the court.
Discovery Cutoff	CourtCases	DiscoveryCutoff	Deadline for discovery requests.
Discovery Reply Date	CourtCases	DiscoveryReplyDate	Deadline for discovery responses.
Last Summary Judgment Date	CourtCases	LastSummaryJudgementDate	Deadline for filing summary judgment motions.
Motion Cutoff	CourtCases	MotionCutoff	Deadline for filing a motion to reopen discovery.
Service Date	CourtCases	ServiceDate	Date the court served notice to the Defendant.
Statute Deadline	CourtCases	StatuteDeadline	Statutory deadline for trying the case.

### Debtor Attorney

Debtor Attorney conditions allow you to query accounts based on criteria for a debtor's attorney.

Condition	Table	Column	Description
Debtor Attorney Address 1	DebtorAttorneys	Addr1	Line 1 of the debtor's attorney's street address.

Condition	Table	Column	Description
Debtor Attorney Address 2	DebtorAttorneys	Addr2	Line 2 of the debtor's attorney's street address.
Debtor Attorney City	DebtorAttorneys	City	City of the debtor's attorney.
Debtor Attorney Email	DebtorAttorneys	Email	Email address of the debtor's attorney.
Debtor Attorney Fax	DebtorAttorneys	Fax	Fax number of the debtor's attorney.
Debtor Attorney Firm	DebtorAttorneys	Firm	Name of the firm where the debtor's attorney works.
Debtor Attorney Name	DebtorAttorneys	Name	Name of the debtor's attorney.
Debtor Attorney Phone	DebtorAttorneys	Phone	Phone number of the debtor's attorney.
Debtor Attorney State	DebtorAttorneys	State	State of the debtor's attorney.
Debtor Attorney Zip Code	DebtorAttorneys	Zipcode	Postal code of the debtor's attorney.

### Judgment Information

Judgment Information conditions allow you to query accounts based on judgment criteria.

Condition	Table	Column	Description
Has Judgment	CourtCases	Judgement	Court case does or doesn't have a judgment.
Judgment Accrued Interest	CourtCases	AccruedInt	Amount of accrued interest.

Account Analysis Conditions Technical Reference

<b>Condition</b>	<b>Table</b>	<b>Column</b>	<b>Description</b>
Judgment Attorney Cost Award	CourtCases	JudgementAttorneyCostAward	Attorney fees awarded in the judgment.
Judgment Book	CourtCases	JudgementBook	Book that contains the recording information received from the court.
Judgment Court Cost Award	CourtCases	JudgementCostAward	Court costs awarded in the judgment.
Judgment Date	CourtCases	JudgementDate	Date the court awarded judgment.
Judgment Interest Award	CourtCases	JudgementIntAward	Interest amount awarded in the judgment.
Judgment Interest From Date	CourtCases	IntFromDate	Date to use to calculate interest at the specified interest rate.
Judgment Interest Rate	CourtCases	JudgementIntRate	Interest rate calculated from the specified interest date and applied toward amounts awarded to the principal.
Judgment Other Cost Award	CourtCases	JudgementOtherAward	Miscellaneous fees awarded in the judgment.
Judgment Page	CourtCases	JudgementPage	Page that contains the recording information received from the court.
Judgment Previous Interest Amount	CourtCases	JudgementPreviousInterestAmt	Interest amount before awarding the judgment.
Judgment Previous Interest Date	CourtCases	JudgementPreviousInterestDate	Date used to calculate interest before awarding the judgment.

Condition	Table	Column	Description
Judgment Previous Interest Rate	CourtCases	JudgementPreviousInterestRate	Interest rate before awarding the judgment.
Judgment Principal Award	CourtCases	JudgementAmt	Interest amount awarded in the judgment.

## Our Attorney

Our Attorney conditions allow you to query accounts based on criteria for your organization's attorney.

Condition	Table	Column	Description
Attorney Address 1	Attorney	Street1	Line 1 of your organization's attorney's address.
Attorney Address 2	Attorney	Street2	Line 2 of your organization's attorney's address.
Attorney Bar Number	Attorney	BarID	Bar number of your organization's attorney.
Attorney City	Attorney	City	City of your organization's attorney.
Attorney Code	Attorney	Code	Code that your organization assigned to identify your organization's attorney.
Attorney Contact	Attorney	Contact	Contact person for your organization's attorney.
Attorney Email	Attorney	Email	Email address of your organization's attorney.
Attorney Fax	Attorney	Fax	Fax number of your organization's attorney.
Attorney Fee Rate	Attorney	Feerate	Fee rate of your organization's attorney.
Attorney Firm	Attorney	Firm	Name of firm where your organization's attorney works.
Attorney Initials	Attorney	Initials	Initials of your organization's attorney.

Condition	Table	Column	Description
Attorney Name	Attorney	Name	Name of your organization's attorney.
Attorney Phone	Attorney	Phone	Phone number of your organization's attorney.
Attorney State	Attorney	State	State of your organization's attorney.
Attorney You've Got Claims ID	Attorney	YouGotClaimsID	ID used to generate files for the You Got Claims interface.
Attorney Zip Code	Attorney	Zipcode	Postal code of your organization's attorney.

## Letters

### Letters

Letters conditions allow you to query accounts based on letter criteria.

Condition	Table	Column	Description
Has Pending Letters?	LetterRequest	DateProcessed	Account does or doesn't have letters that are pending processing.
Last Letter Sent	LetterRequest	LetterCode	Code that identifies the last letter sent to a person on the account.
Last Letter Sent Date	LetterRequest	DateProcessed	Date the last letter sent to a person on the account.

### Letter Requests

Letter Requests conditions allow you to query accounts based on letter request criteria.

Condition	Table	Column	Description
Letter	LetterRequest	LetterCode	Code that identifies the letter requested on the account.
Letter Amount Due	LetterRequest	AmountDue	Payment amount due to display in the letter.



Condition	Table	Column	Description
Letter Created Date	LetterRequest	DateCreated	Date a user created the letter.
Letter Due Date	LetterRequest	DueDate	Date the letter is due to send.
Letter Processed Date	LetterRequest	DateProcessed	Date a user processed the letter.
Letter Processed?	LetterRequest	DateProcessed	User did or didn't process the letter.
Letter Requested Date	LetterRequest	DateRequested	Date a user requested the letter.

## Money Buckets

### Money Buckets

Money Buckets conditions allow you to query accounts based on criteria for money buckets.

### Accrued

Accrued conditions allow you to query accounts based on criteria in the accrued money bucket.

Condition	Table	Column	Description
Accrued	Master	Accrued10	Transaction surcharges applied against the account since placement.
AccruedInterest	Master	Accrued2	Interest accrued against the account since placement.

### Current

Current conditions allow you to query accounts based on the current balance money buckets.

Condition	Table	Column	Description
Current0	Master	Current0	Current total balance on the account.
Current1	Master	Current1	Current principal balance on the account.
Current10	Master	Current10	Current balance in money bucket 10.

## Account Analysis Conditions Technical Reference

Condition	Table	Column	Description
Current2	Master	Current2	Current interest balance on the account.
Current3	Master	Current3	Current balance in money bucket 3.
Current4	Master	Current4	Current balance in money bucket 4.
Current5	Master	Current5	Current balance in money bucket 5.
Current6	Master	Current6	Current balance in money bucket 6.
Current7	Master	Current7	Current balance in money bucket 7.
Current8	Master	Current8	Current balance in money bucket 8.
Current9	Master	Current9	Current balance in money bucket 9.

### Original

Original conditions allow you to query accounts based on the original balance money buckets.

Condition	Table	Column	Description
Original	Master	Original	Total original balance on the account.
Original1	Master	Original1	Original principal balance on the account.
Original10	Master	Original10	Original balance in money bucket 10.
Original2	Master	Original2	Original interest balance on the account.
Original3	Master	Original3	Original balance in money bucket 3.
Original4	Master	Original4	Original balance in money bucket 4.
Original5	Master	Original5	Original balance in money bucket 5.
Original6	Master	Original6	Original balance in money bucket 6.
Original7	Master	Original7	Original balance in money bucket 7.
Original8	Master	Original8	Original balance in money bucket 8.

Condition	Table	Column	Description
Original9	Master	Original9	Original balance in money bucket 9.

## Paid

Paid conditions allow you to query accounts based on the paid money buckets.

Condition	Table	Column	Description
Paid	Master	Paid	Total amount paid on the account.
Paid1	Master	Paid1	Total principal paid on the account.
Paid10	Master	Paid10	Total paid against money bucket 10.
Paid2	Master	Paid2	Total interest paid on the account.
Paid3	Master	Paid3	Total paid against money bucket 3.
Paid4	Master	Paid4	Total paid against money bucket 4.
Paid5	Master	Paid5	Total paid against money bucket 5.
Paid6	Master	Paid6	Total paid against money bucket 6.
Paid7	Master	Paid7	Total paid against money bucket 7.
Paid8	Master	Paid8	Total paid against money bucket 8.
Paid9	Master	Paid9	Total paid against money bucket 9.

## Patient Information

### Patient Information

Patient Information conditions allow you to query accounts based on medical patient criteria.

Condition	Table	Column	Description
Guarantor Record Number	PatientInfo	GuarantorRecNumber	Code that the medical facility assigned to identify the payment guarantor.
Patient Age	PatientInfo	Age	Patient's age.

Condition	Table	Column	Description
Patient Date of Birth	PatientInfo	DOB	Patient's date of birth.
Patient Employer Name	PatientInfo	EmployerName	Name of patient's employer.
Patient Home Phone	PatientInfo	Phone	Patient's home phone number.
Patient Marital Status	PatientInfo	MaritalStatus	Patient's marital status, such as married or divorced.
Patient Name	PatientInfo	Name	Patient's full name.
Patient Record Number	PatientInfo	PatientRecNumber	Code that the medical facility assigned to identify the patient.
Patient Sex	PatientInfo	Sex	Patient's gender.
Patient SSN	PatientInfo	SSN	Patient's social security number.
Patient Work Phone	PatientInfo	WorkPhone	Patient's work phone number.

## Address

Address conditions allow you to query accounts based on medical patient address criteria.

Condition	Table	Column	Description
Patient City	PatientInfo	City	Patient's city.
Patient Country	PatientInfo	Country	Patient's country.
Patient State	PatientInfo	State	Patient's state.
Patient Street 1	PatientInfo	Street1	Line 1 of the patient's street address.
Patient Street 2	PatientInfo	Street2	Line 2 of the patient's street address.
Patient Zip Code	PatientInfo	ZipCode	Patient's postal code.

## Doctor Information

Doctor Information conditions allow you to query accounts based on medical doctor criteria.

Condition	Table	Column	Description
Doctor Fax	PatientInfo	DoctorFax	Admitting doctor's fax number.
Doctor Name	PatientInfo	DoctorName	Name of the doctor who admitted the patient.
Doctor Phone	PatientInfo	DoctorPhone	Admitting doctor's phone number.

## Facility Information

### Facility Information

Facility Information conditions allow you to query accounts based on medical facility criteria.

Condition	Table	Column	Description
Admission Date	PatientInfo	AdmissionDate	Date the medical facility admitted the patient.
Discharge Date	PatientInfo	DischargeDate	Date the medical facility discharged the patient.
Facility Fax	PatientInfo	FacilityFax	Medical facility's fax number.
Facility Name	PatientInfo	FacilityName	Name of the medical facility.
Facility Phone	PatientInfo	FacilityPhone	Medical facility's phone number.
Service Date	PatientInfo	ServiceDate	Date the patient received medical care.

## Address

Address conditions allow you to query accounts based on medical facility address criteria.

Condition	Table	Column	Description
Facility City	PatientInfo	FacilityCity	Medical facility's city.
Facility Country	PatientInfo	FacilityCountry	Medical facility's country.
Facility State	PatientInfo	FacilityState	Medical facility's state.
Facility Street 1	PatientInfo	FacilityStreet1	Line 1 of the medical facility's street address.

Condition	Table	Column	Description
Facility Street 2	PatientInfo	FacilityStreet2	Line 2 of the medical facility's street address.
Facility Zip Code	PatientInfo	FacilityZipCode	Medical facility's postal code.

## Insurance Information

Insurance Information conditions allow you to query accounts based on medical insurance criteria.

Condition	Table	Column	Description
Accept Assignment	Insurance	AcceptAssignment	Healthcare provider did or didn't agree to accept assignment from the insurance provider.
Additional Info	Insurance	AdditionalInfo	More information about the patient's health insurance.
Authorize Payment To Provider	Insurance	AuthPmtToProvider	Insurance provider did or didn't authorize payment to the healthcare provider.
Carrier City	Insurance	CarrierCity	Insurance carrier's city.
Carrier Doc Provider Number	Insurance	CarrierDocProviderNumber	Code that identifies the healthcare provider.
Carrier Name	Insurance	CarrierName	Insurance carrier's name.
Carrier Ref Doc Provider Number	Insurance	CarrierRefDocProviderNumber	Code that identifies the referring healthcare provider.
Carrier State	Insurance	CarrierState	Insurance carrier's state.
Carrier Street 1	Insurance	CarrierStreet1	Line 1 of the insurance carrier's street address.
Carrier Street 2	Insurance	CarrierStreet2	Line 2 of the insurance carrier's street address.
Carrier Zip	Insurance	CarrierZip	Insurance carrier's postal code.

<b>Condition</b>	<b>Table</b>	<b>Column</b>	<b>Description</b>
Employer Health Plan	Insurance	EmployerHealthPlan	Name of the employer's healthcare plan.
Group Name	Insurance	GroupName	Name of the employer's group insurance plan.
Group Number	Insurance	GroupNumber	Number that identifies the employer's group insurance plan.
Insured Birthday	Insurance	InsuredBirthday	Insured person's date of birth.
Insured City	Insurance	InsuredCity	Insured person's city.
Insured Employer	Insurance	InsuredEmployer	Name of Insured person's employer.
Insured Name	Insurance	InsuredName	Insured person's full name.
Insured Phone	Insurance	InsuredPhone	Insured person's phone number.
Insured Sex	Insurance	InsuredSex	Insured person's gender.
Insured State	Insurance	InsuredState	Insured person's state.
Insured Street 1	Insurance	InsuredStreet1	Line 1 of the insured person's street address.
Insured Street 2	Insurance	InsuredStreet2	Line 2 of the insured person's street address.
Insured Zip	Insurance	InsuredZip	Insured person's postal code.
Patient Relation To Insured	Insurance	PatientRelationToInsured	Patient's relationship to the insured person.
Policy Number	Insurance	PolicyNumber	Number that the insurance company assigned to identify the insured person's health insurance policy.
Program Name	Insurance	Program	Name of the insured person's insurance program.

## Kin Information

Kin Information conditions allow you to query accounts based on next of kin criteria.

Condition	Table	Column	Description
Kin City	PatientInfo	KinCity	City of the patient's next of kin.
Kin Country	PatientInfo	KinCountry	Country of the patient's next of kin.
Kin Name	PatientInfo	KinName	Full name of the patient's next of kin.
Kin Phone	PatientInfo	KinPhone	Phone number of the patient's next of kin.
Kin State	PatientInfo	KinState	State of the patient's next of kin.
Kin Street 1	PatientInfo	KinStreet1	Line 1 of the street address of the patient's next of kin.
Kin Street 2	PatientInfo	KinStreet2	Line 2 of the street address of the patient's next of kin.
Kin Zip Code	PatientInfo	KinZipCode	Postal code of the patient's next of kin.

## Payments

### Payments

Payments conditions allow you to query accounts based on payment criteria.

Condition	Table	Column	Description
Bounced Date		Calculated	Payment reversal date.
Has Bounced Payment?		Calculated	Account has or hasn't had a bounced payment.
Last Payment Amount	Master	LastPaidAmt	Last payment on the account.
Last Payment Date	Master	LastPaid	Date of last payment on the account.
Number of Good Payments		Calculated	Number of successful payments on the account.



Condition	Table	Column	Description
Paid Against Interest	Master	Paid2	Amount of the payment applied to interest.
Paid Against Principal	Master	Paid1	Amount of the payment applied to principal.
Percentage Paid		Calculated	Percentage of the total amount due that the debtor paid.
Total Paid	Master	Paid	Total payment amount.

## Payment Summary

### Payment Summary

Payment Summary conditions allow you to query accounts based on payment summary criteria.

### Fees

#### Fees

Fees conditions allow you to query accounts based on agency and collector fees criteria.

Condition	Table	Column	Description
Agency Fee	AccountPaymentSummaryView	AgencyFee	Total agency fees.
Agency Fee To Agency	AccountPaymentSummaryView	AgencyFeeToAgency	Agency fees that the agency receives.
Agency Fee To Client	AccountPaymentSummaryView	AgencyFeeToClient	Agency fees that the client receives.
Agency Fee To Us	AccountPaymentSummaryView	AgencyFeeToUs	Agency fees that your organization receives.
Collector Fee	AccountPaymentSummaryView	CollectorFee	Total collector fees.
Collector Fee To Agency	AccountPaymentSummaryView	CollectorFeeToAgency	Collector fees that the agency receives.
Collector Fee To Client	AccountPaymentSummaryView	CollectorFeeToClient	Collector fees that the outside collection agency or attorney receives.

Account Analysis Conditions Technical Reference

Condition	Table	Column	Description
Collector Fee To Us	AccountPaymentSummaryView	CollectorFeeToUs	Collector fees that your organization receives.

**Gross**

**Gross**

Gross conditions allow you to query accounts based on gross fees.

Condition	Table	Column	Description
Fee	AccountPaymentSummaryView	Fee	Total gross fees.
Fee 1	AccountPaymentSummaryView	Fee1	First gross fee.
Fee 10	AccountPaymentSummaryView	Fee10	Tenth gross fee.
Fee 2	AccountPaymentSummaryView	Fee2	Second gross fee.
Fee 3	AccountPaymentSummaryView	Fee3	Third gross fee.
Fee 4	AccountPaymentSummaryView	Fee4	Fourth gross fee.
Fee 5	AccountPaymentSummaryView	Fee5	Fifth gross fee.
Fee 6	AccountPaymentSummaryView	Fee6	Sixth gross fee.
Fee 7	AccountPaymentSummaryView	Fee7	Seventh gross fee.
Fee 8	AccountPaymentSummaryView	Fee8	Eighth gross fee.
Fee 9	AccountPaymentSummaryView	Fee9	Ninth gross fee.

**To Agency**

"To Agency" conditions allow you to query accounts based on gross fees paid to agencies.

Condition	Table	Column	Description
Fee 1 To Agency	AccountPaymentSummaryView	Fee1ToAgency	First fee paid to agencies.
Fee 10 To Agency	AccountPaymentSummaryView	Fee10ToAgency	Tenth fee paid to agencies.

Condition	Table	Column	Description
Fee 2 To Agency	AccountPaymentSummaryView	Fee2ToAgency	Second fee paid to agencies.
Fee 3 To Agency	AccountPaymentSummaryView	Fee3ToAgency	Third fee paid to agencies.
Fee 4 To Agency	AccountPaymentSummaryView	Fee4ToAgency	Fourth fee paid to agencies.
Fee 5 To Agency	AccountPaymentSummaryView	Fee5ToAgency	Fifth fee paid to agencies.
Fee 6 To Agency	AccountPaymentSummaryView	Fee6ToAgency	Sixth fee paid to agencies.
Fee 7 To Agency	AccountPaymentSummaryView	Fee7ToAgency	Seventh fee paid to agencies.
Fee 8 To Agency	AccountPaymentSummaryView	Fee8ToAgency	Eighth fee paid to agencies.
Fee 9 To Agency	AccountPaymentSummaryView	Fee9ToAgency	Ninth fee paid to agencies.
Fee To Agency	AccountPaymentSummaryView	FeeToAgency	Total fees paid to agencies.

**To Client**

"To Client" conditions allow you to query accounts based on gross fees paid to customers.

Condition	Table	Column	Description
Fee 1 To Client	AccountPaymentSummaryView	Fee1ToClient	First gross fee paid to customers.
Fee 10 To Client	AccountPaymentSummaryView	Fee10ToClient	Tenth gross fee paid to customers.
Fee 2 To Client	AccountPaymentSummaryView	Fee2ToClient	Second gross fee paid to customers.
Fee 3 To Client	AccountPaymentSummaryView	Fee3ToClient	Third gross fee paid to customers.

Account Analysis Conditions Technical Reference

Condition	Table	Column	Description
Fee 4 To Client	AccountPaymentSummaryView	Fee4ToClient	Fourth gross fee paid to customers.
Fee 5 To Client	AccountPaymentSummaryView	Fee5ToClient	Fifth gross fee paid to customers.
Fee 6 To Client	AccountPaymentSummaryView	Fee6ToClient	Sixth gross fee paid to customers.
Fee 7 To Client	AccountPaymentSummaryView	Fee7ToClient	Seventh gross fee paid to customers.
Fee 8 To Client	AccountPaymentSummaryView	Fee8ToClient	Eighth gross fee paid to customers.
Fee 9 To Client	AccountPaymentSummaryView	Fee9ToClient	Ninth gross fee paid to customers.
Fee To Client	AccountPaymentSummaryView	FeeToClient	Total gross fees paid to customers.

**To Us**

"To Us" conditions allow you to query accounts based on gross fees paid to your organization.

Condition	Table	Column	Description
Fee 1 To Us	AccountPaymentSummaryView	Fee1ToUs	First gross fee paid to your organization.
Fee 10 To Us	AccountPaymentSummaryView	Fee10ToUs	Tenth gross fee paid to your organization.
Fee 2 To Us	AccountPaymentSummaryView	Fee2ToUs	Second gross fee paid to your organization.
Fee 3 To Us	AccountPaymentSummaryView	Fee3ToUs	Third gross fee paid to your organization.
Fee 4 To Us	AccountPaymentSummaryView	Fee4ToUs	Fourth gross fee paid to your organization.
Fee 5 To Us	AccountPaymentSummaryView	Fee5ToUs	Fifth gross fee paid to your organization.

Condition	Table	Column	Description
Fee 6 To Us	AccountPaymentSummaryView	Fee6ToUs	Sixth gross fee paid to your organization.
Fee 7 To Us	AccountPaymentSummaryView	Fee7ToUs	Seventh gross fee paid to your organization.
Fee 8 To Us	AccountPaymentSummaryView	Fee8ToUs	Eighth gross fee paid to your organization.
Fee 9 To Us	AccountPaymentSummaryView	Fee9ToUs	Ninth gross fee paid to your organization.
Fee To Us	AccountPaymentSummaryView	FeeToUs	Total gross fee paid to your organization.

**Invoicable****Invoicable**

Invoicable conditions allow you to query accounts based on invoicing fees.

Condition	Table	Column	Description
Invoicable Fee	AccountPaymentSummaryView	InvoicableFee	First invoicable fee.
Invoicable Fee 1	AccountPaymentSummaryView	InvoicableFee1	Tenth invoicable fee.
Invoicable Fee 10	AccountPaymentSummaryView	InvoicableFee10	Second invoicable fee.
Invoicable Fee 2	AccountPaymentSummaryView	InvoicableFee2	Third invoicable fee.
Invoicable Fee 3	AccountPaymentSummaryView	InvoicableFee3	Fourth invoicable fee.
Invoicable Fee 4	AccountPaymentSummaryView	InvoicableFee4	Fifth invoicable fee.
Invoicable Fee 5	AccountPaymentSummaryView	InvoicableFee5	Sixth invoicable fee.

Account Analysis Conditions Technical Reference

Condition	Table	Column	Description
Invoicable Fee 6	AccountPaymentSummaryView	InvoicableFee6	Seventh invoicable fee.
Invoicable Fee 7	AccountPaymentSummaryView	InvoicableFee7	Eighth invoicable fee.
Invoicable Fee 8	AccountPaymentSummaryView	InvoicableFee8	Ninth invoicable fee.
Invoicable Fee 9	AccountPaymentSummaryView	InvoicableFee9	Total invoicable fee.

**To Agency**

"To Agency" conditions allow you to query accounts based on fees invoiced to agencies.

Condition	Table	Column	Description
Invoicable Fee 1 To Agency	AccountPaymentSummaryView	InvoicableFee1ToAgency	First invoicable fee paid to agencies.
Invoicable Fee 10 To Agency	AccountPaymentSummaryView	InvoicableFee10ToAgency	Tenth invoicable fee paid to agencies.
Invoicable Fee 2 To Agency	AccountPaymentSummaryView	InvoicableFee2ToAgency	Second invoicable fee paid to agencies.
Invoicable Fee 3 To Agency	AccountPaymentSummaryView	InvoicableFee3ToAgency	Third invoicable fee paid to agencies.
Invoicable Fee 4 To Agency	AccountPaymentSummaryView	InvoicableFee4ToAgency	Fourth invoicable fee paid to agencies.
Invoicable Fee 5 To Agency	AccountPaymentSummaryView	InvoicableFee5ToAgency	Fifth invoicable fee paid to agencies.
Invoicable Fee 6 To Agency	AccountPaymentSummaryView	InvoicableFee6ToAgency	Sixth invoicable fee paid to agencies.
Invoicable Fee 7 To Agency	AccountPaymentSummaryView	InvoicableFee7ToAgency	Seventh invoicable fee paid to agencies.
Invoicable Fee 8 To Agency	AccountPaymentSummaryView	InvoicableFee8ToAgency	Eighth invoicable fee paid to agencies.

Condition	Table	Column	Description
Invoicable Fee 9 To Agency	AccountPaymentSummaryView	InvoicableFee9ToAgency	Ninth invoicable fee paid to agencies.
Invoicable Fee To Agency	AccountPaymentSummaryView	InvoicableFeeToAgency	Total invoicable fee paid to agencies.

### To Client

"To Client" conditions allow you to query accounts based on invoice fees invoiced to customers.

Condition	Table	Column	Description
Invoicable Fee 1 To Client	AccountPaymentSummaryView	InvoicableFee1ToClient	First invoicable fee paid to customers.
Invoicable Fee 10 To Client	AccountPaymentSummaryView	InvoicableFee10ToClient	Tenth invoicable fee paid to customers.
Invoicable Fee 2 To Client	AccountPaymentSummaryView	InvoicableFee2ToClient	Second invoicable fee paid to customers.
Invoicable Fee 3 To Client	AccountPaymentSummaryView	InvoicableFee3ToClient	Third invoicable fee paid to customers.
Invoicable Fee 4 To Client	AccountPaymentSummaryView	InvoicableFee4ToClient	Fourth invoicable fee paid to customers.
Invoicable Fee 5 To Client	AccountPaymentSummaryView	InvoicableFee5ToClient	Fifth invoicable fee paid to customers.
Invoicable Fee 6 To Client	AccountPaymentSummaryView	InvoicableFee6ToClient	Sixth invoicable fee paid to customers.
Invoicable Fee 7 To Client	AccountPaymentSummaryView	InvoicableFee7ToClient	Seventh invoicable fee paid to customers.

## Account Analysis Conditions Technical Reference

Condition	Table	Column	Description
Invoicable Fee 8 To Client	AccountPaymentSummaryView	InvoicableFee8ToClient	Eighth invoicable fee paid to customers.
Invoicable Fee 9 To Client	AccountPaymentSummaryView	InvoicableFee9ToClient	Ninth invoicable fee paid to customers.
Fee To Client	AccountPaymentSummaryView	InvoicableFeeToClient	Total invoicable fee paid to customers.

### To Us

"To Us" conditions allow you to query accounts based on fees invoiced to your organization.

Condition	Table	Column	Description
Invoicable Fee 1 To Us	AccountPaymentSummaryView	InvoicableFee1ToUs	First invoicable fee paid to your organization.
Invoicable Fee 10 To Us	AccountPaymentSummaryView	InvoicableFee10ToUs	Tenth invoicable fee paid to your organization.
Invoicable Fee 2 To Us	AccountPaymentSummaryView	InvoicableFee2ToUs	Second invoicable fee paid to your organization.
Invoicable Fee 3 To Us	AccountPaymentSummaryView	InvoicableFee3ToUs	Third invoicable fee paid to your organization.
Invoicable Fee 4 To Us	AccountPaymentSummaryView	InvoicableFee4ToUs	Fourth invoicable fee paid to your organization.
Invoicable Fee 5 To Us	AccountPaymentSummaryView	InvoicableFee5ToUs	Fifth invoicable fee paid to your organization.
Invoicable Fee 6 To Us	AccountPaymentSummaryView	InvoicableFee6ToUs	Sixth invoicable fee paid to your organization.
Invoicable Fee 7 To Us	AccountPaymentSummaryView	InvoicableFee7ToUs	Seventh invoicable fee paid to your organization.
Invoicable Fee 8 To Us	AccountPaymentSummaryView	InvoicableFee8ToUs	Eighth invoicable fee paid to your organization.



Condition	Table	Column	Description
Invoicable Fee 9 To Us	AccountPaymentSummaryView	InvoicableFee9ToUs	Ninth invoicable fee paid to your organization.
Invoicable Fee To Us	AccountPaymentSummaryView	InvoicableFeeToUs	Total invoicable fee paid to your organization.

## Payments

### Payments

Payments conditions allow you to query accounts based on account payment criteria.

Condition	Table	Column	Description
Over Payments	AccountPaymentSummaryView	OverPayments	Overpayment amount (amount paid less the account balance).
Over Payments To Agency	AccountPaymentSummaryView	OverPaymentsToAgency	Overpayment amount to the agency.
Over Payments To Client	AccountPaymentSummaryView	OverPaymentsToClient	Overpayment amount to the customer.
Over Payments To Us	AccountPaymentSummaryView	OverPaymentsToUs	Overpayment amount to your organization.
Total Paid	AccountPaymentSummaryView	TotalPaid	Total amount paid.
Total Paid To Agency	AccountPaymentSummaryView	TotalPaidToAgency	Total amount paid to the agency.
Total Paid to Client	AccountPaymentSummaryView	TotalPaidToClient	Total amount paid to the customer.
Total Paid To Us	AccountPaymentSummaryView	TotalPaidToUs	Total amount paid to your organization.

### Gross

### Gross

Gross conditions allow you to query accounts based on gross payments.

Account Analysis Conditions Technical Reference

Condition	Table	Column	Description
Paid	AccountPaymentSummaryView	Paid	Total payment amount.
Paid 1	AccountPaymentSummaryView	Paid1	Amount of principal included in the payment.
Paid 10	AccountPaymentSummaryView	Paid10	Other amount included in the payment.
Paid 2	AccountPaymentSummaryView	Paid2	Amount of interest included in the payment.
Paid 3	AccountPaymentSummaryView	Paid3	Other amount included in the payment.
Paid 4	AccountPaymentSummaryView	Paid4	Other amount included in the payment.
Paid 5	AccountPaymentSummaryView	Paid5	Other amount included in the payment.
Paid 6	AccountPaymentSummaryView	Paid6	Other amount included in the payment.
Paid 7	AccountPaymentSummaryView	Paid7	Other amount included in the payment.
Paid 8	AccountPaymentSummaryView	Paid8	Other amount included in the payment.
Paid 9	AccountPaymentSummaryView	Paid9	Other amount included in the payment.

**To Agency**

"To Agency" conditions allow you to query accounts based on gross payments sent to agencies.

Condition	Table	Column	Description
Paid 1 To Agency	AccountPaymentSummaryView	Paid1ToAgency	Amount of principal included in the payment to agencies.
Paid 10 To Agency	AccountPaymentSummaryView	Paid10ToAgency	Other amount included in the payment to agencies.
Paid 2 To Agency	AccountPaymentSummaryView	Paid2ToAgency	Amount of interest included in the payment to agencies.
Paid 3 To Agency	AccountPaymentSummaryView	Paid3ToAgency	Other amount included in the payment to agencies.

<b>Condition</b>	<b>Table</b>	<b>Column</b>	<b>Description</b>
Paid 4 To Agency	AccountPaymentSummaryView	Paid4ToAgency	Other amount included in the payment to agencies.
Paid 5 To Agency	AccountPaymentSummaryView	Paid5ToAgency	Other amount included in the payment to agencies.
Paid 6 To Agency	AccountPaymentSummaryView	Paid6ToAgency	Other amount included in the payment to agencies.
Paid 7 To Agency	AccountPaymentSummaryView	Paid7ToAgency	Other amount included in the payment to agencies.
Paid 8 To Agency	AccountPaymentSummaryView	Paid8ToAgency	Other amount included in the payment to agencies.
Paid 9 To Agency	AccountPaymentSummaryView	Paid9ToAgency	Other amount included in the payment to agencies.
Paid To Agency	AccountPaymentSummaryView	PaidToAgency	Total payment amount to agencies.

**To Client**

"To Client" conditions allow you to query accounts based on gross payments sent to customers.

<b>Condition</b>	<b>Table</b>	<b>Column</b>	<b>Description</b>
Paid 1 To Client	AccountPaymentSummaryView	Paid1ToClient	Amount of principal included in the payment to customers.
Paid 10 To Client	AccountPaymentSummaryView	Paid10ToClient	Other amount included in the payment to customers.
Paid 2 To Client	AccountPaymentSummaryView	Paid2ToClient	Amount of interest included in the payment to customers.
Paid 3 To Client	AccountPaymentSummaryView	Paid3ToClient	Other amount included in the payment to customers.
Paid 4 To Client	AccountPaymentSummaryView	Paid4ToClient	Other amount included in the payment to customers.
Paid 5 To Client	AccountPaymentSummaryView	Paid5ToClient	Other amount included in the payment to customers.

Account Analysis Conditions Technical Reference

Condition	Table	Column	Description
Paid 6 To Client	AccountPaymentSummaryView	Paid6ToClient	Other amount included in the payment to customers.
Paid 7 To Client	AccountPaymentSummaryView	Paid7ToClient	Other amount included in the payment to customers.
Paid 8 To Client	AccountPaymentSummaryView	Paid8ToClient	Other amount included in the payment to customers.
Paid 9 To Client	AccountPaymentSummaryView	Paid9ToClient	Other amount included in the payment to customers.
Paid To Client	AccountPaymentSummaryView	PaidToClient	Total payment amount to customers.

**To Us**

"To Us" conditions allow you to query accounts based on gross payments sent to your organization.

Condition	Table	Column	Description
Paid 1 To Us	AccountPaymentSummaryView	Paid1ToUs	Amount of principal included in the payment to your organization.
Paid 10 To Us	AccountPaymentSummaryView	Paid10ToUs	Other amount included in the payment to your organization.
Paid 2 To Us	AccountPaymentSummaryView	Paid2ToUs	Amount of interest included in the payment to your organization.
Paid 3 To Us	AccountPaymentSummaryView	Paid3ToUs	Other amount included in the payment to your organization.
Paid 4 To Us	AccountPaymentSummaryView	Paid4ToUs	Other amount included in the payment to your organization.
Paid 5 To Us	AccountPaymentSummaryView	Paid5ToUs	Other amount included in the payment to your organization.
Paid 6 To Us	AccountPaymentSummaryView	Paid6ToUs	Other amount included in the payment to your organization.
Paid 7 To Us	AccountPaymentSummaryView	Paid7ToUs	Other amount included in the payment to your organization.

Condition	Table	Column	Description
Paid 8 To Us	AccountPaymentSummaryView	Paid8ToUs	Other amount included in the payment to your organization.
Paid 9 To Us	AccountPaymentSummaryView	Paid9ToUs	Other amount included in the payment to your organization.
Paid To Us	AccountPaymentSummaryView	PaidToUs	Total payment amount to your organization.

**Invoicable****Invoicable**

Invoicable conditions allow you to query accounts based on invoiced payments.

Condition	Table	Column	Description
Invoicable Paid	AccountPaymentSummaryView	InvoicablePaid	Total payment amount invoiced.
Invoicable Paid 1	AccountPaymentSummaryView	InvoicablePaid1	First payment amount invoiced.
Invoicable Paid 10	AccountPaymentSummaryView	InvoicablePaid10	Tenth payment amount invoiced.
Invoicable Paid 2	AccountPaymentSummaryView	InvoicablePaid2	Second payment amount invoiced.
Invoicable Paid 3	AccountPaymentSummaryView	InvoicablePaid3	Third payment amount invoiced.
Invoicable Paid 4	AccountPaymentSummaryView	InvoicablePaid4	Fourth payment amount invoiced.
Invoicable Paid 5	AccountPaymentSummaryView	InvoicablePaid5	Fifth payment amount invoiced.
Invoicable Paid 6	AccountPaymentSummaryView	InvoicablePaid6	Sixth payment amount invoiced.
Invoicable Paid 7	AccountPaymentSummaryView	InvoicablePaid7	Seventh payment amount invoiced.

Account Analysis Conditions Technical Reference

Condition	Table	Column	Description
Invoicable Paid 8	AccountPaymentSummaryView	InvoicablePaid8	Eighth payment amount invoiced.
Invoicable Paid 9	AccountPaymentSummaryView	InvoicablePaid9	Ninth payment amount invoiced.

**To Agency**

"To Agency" conditions allow you to query accounts based on payments invoiced to agencies.

Condition	Table	Column	Description
Invoicable Paid 1 To Agency	AccountPaymentSummaryView	InvoicablePaid1ToAgency	First payment amount invoiced to agencies.
Invoicable Paid 10 To Agency	AccountPaymentSummaryView	InvoicablePaid10ToAgency	Tenth payment amount invoiced to agencies.
Invoicable Paid 2 To Agency	AccountPaymentSummaryView	InvoicablePaid2ToAgency	Second payment amount invoiced to agencies.
Invoicable Paid 3 To Agency	AccountPaymentSummaryView	InvoicablePaid3ToAgency	Third payment amount invoiced to agencies.
Invoicable Paid 4 To Agency	AccountPaymentSummaryView	InvoicablePaid4ToAgency	Fourth payment amount invoiced to agencies.
Invoicable Paid 5 To Agency	AccountPaymentSummaryView	InvoicablePaid5ToAgency	Fifth payment amount invoiced to agencies.
Invoicable Paid 6 To Agency	AccountPaymentSummaryView	InvoicablePaid6ToAgency	Sixth payment amount invoiced to agencies.
Invoicable Paid 7 To Agency	AccountPaymentSummaryView	InvoicablePaid7ToAgency	Seventh payment amount invoiced to agencies.
Invoicable Paid 8 To Agency	AccountPaymentSummaryView	InvoicablePaid8ToAgency	Eighth payment amount invoiced to agencies.
Invoicable Paid 9 To Agency	AccountPaymentSummaryView	InvoicablePaid9ToAgency	Ninth payment amount invoiced to agencies.
Invoicable Paid To Agency	AccountPaymentSummaryView	InvoicablePaidToAgency	Total payment amount invoiced to agencies.

**To Client**

"To Client" conditions allow you to query accounts based on payments invoiced to customers.

<b>Condition</b>	<b>Table</b>	<b>Column</b>	<b>Description</b>
Invoicable Paid 1 To Client	AccountPaymentSummaryView	InvoicablePaid1ToClient	First payment amount invoiced to customers.
Invoicable Paid 10 To Client	AccountPaymentSummaryView	InvoicablePaid10ToClient	Tenth payment amount invoiced to customers.
Invoicable Paid 2 To Client	AccountPaymentSummaryView	InvoicablePaid2ToClient	Second payment amount invoiced to customers.
Invoicable Paid 3 To Client	AccountPaymentSummaryView	InvoicablePaid3ToClient	Third payment amount invoiced to customers.
Invoicable Paid 4 To Client	AccountPaymentSummaryView	InvoicablePaid4ToClient	Fourth payment amount invoiced to customers.
Invoicable Paid 5 To Client	AccountPaymentSummaryView	InvoicablePaid5ToClient	Fifth payment amount invoiced to customers.
Invoicable Paid 6 To Client	AccountPaymentSummaryView	InvoicablePaid6ToClient	Sixth payment amount invoiced to customers.
Invoicable Paid 7 To Client	AccountPaymentSummaryView	InvoicablePaid7ToClient	Seventh payment amount invoiced to customers.
Invoicable Paid 8 To Client	AccountPaymentSummaryView	InvoicablePaid8ToClient	Eighth payment amount invoiced to customers.
Invoicable Paid 9 To Client	AccountPaymentSummaryView	InvoicablePaid9ToClient	Ninth payment amount invoiced to customers.

## Account Analysis Conditions Technical Reference

Condition	Table	Column	Description
Paid To Client	AccountPaymentSummaryView	InvoicablePaidToClient	Total payment amount invoiced to customers.

### To Us

"To Us" conditions allow you to query accounts based on payments invoiced to your organization.

Condition	Table	Column	Description
Invoicable Fee 1 To Us	AccountPaymentSummaryView	InvoicablePaid1ToUs	First payment amount invoiced to your organization.
Invoicable Fee 10 To Us	AccountPaymentSummaryView	InvoicablePaid10ToUs	Tenth payment amount invoiced to your organization.
Invoicable Fee 2 To Us	AccountPaymentSummaryView	InvoicablePaid2ToUs	Second payment amount invoiced to your organization.
Invoicable Fee 3 To Us	AccountPaymentSummaryView	InvoicablePaid3ToUs	Third payment amount invoiced to your organization.
Invoicable Fee 4 To Us	AccountPaymentSummaryView	InvoicablePaid4ToUs	Fourth payment amount invoiced to your organization.
Invoicable Fee 5 To Us	AccountPaymentSummaryView	InvoicablePaid5ToUs	Fifth payment amount invoiced to your organization.
Invoicable Fee 6 To Us	AccountPaymentSummaryView	InvoicablePaid6ToUs	Sixth payment amount invoiced to your organization.
Invoicable Fee 7 To Us	AccountPaymentSummaryView	InvoicablePaid7ToUs	Seventh payment amount invoiced to your organization.
Invoicable Fee 8 To Us	AccountPaymentSummaryView	InvoicablePaid8ToUs	Eighth payment amount invoiced to your organization.
Invoicable Fee 9 To Us	AccountPaymentSummaryView	InvoicablePaid9ToUs	Ninth payment amount invoiced to your organization.
Invoicable Fee To Us	AccountPaymentSummaryView	InvoicablePaidToUs	Total payment amount invoiced to your organization.



## Transactions

### Transactions

Transactions conditions allow you to query accounts based on monetary transactions on the account.

Condition	Table	Column	Description
Corrections	AccountPaymentSummaryView	Corrections	Total payment corrections.
Payments	AccountPaymentSummaryView	Payments	Total payments.
Reversals	AccountPaymentSummaryView	Reversals	Total reversals.
Total Transactions	AccountPaymentSummaryView	Transactions	Total transaction amount.

### To Agency

"To Agency" conditions allow you to query accounts based on monetary transactions sent to agencies.

Condition	Table	Column	Description
Corrections To Agency	AccountPaymentSummaryView	CorrectionsToAgency	Total payment corrections to agencies.
Payments To Agency	AccountPaymentSummaryView	PaymentsToAgency	Total payments to agencies.
Reversals To Agency	AccountPaymentSummaryView	ReversalsToAgency	Total reversals to agencies.

### To Client

"To Client" conditions allow you to query accounts based on monetary transactions sent to customers.

Condition	Table	Column	Description
Corrections To Client	AccountPaymentSummaryView	CorrectionsToClient	Total payment corrections to customers.
Payments To Client	AccountPaymentSummaryView	PaymentsToClient	Total payments to customers.
Reversals To Client	AccountPaymentSummaryView	ReversalsToClient	Total reversals to customers.

### To Us

"To Us" conditions allow you to query accounts based on monetary transactions sent to your organization.

Condition	Table	Column	Description
Corrections To Us	AccountPaymentSummaryView	CorrectionsToUs	Total payment corrections to your organization.
Payments To Us	AccountPaymentSummaryView	PaymentsToUs	Total payments to your organization.
Reversals To Us	AccountPaymentSummaryView	ReversalsToUs	Total reversals to your organization.

### Stair Step

#### Stair Step

Stair Step conditions allow you to query accounts based on stair step reporting.

Condition	Table	Column	Description
Adjustments	StairStep_AccountPlacements	Adjustments	Total adjustment amount.
Gross Dollars Placed	StairStep_AccountPlacements	GrossDollarsPlaced	Gross dollar amount placed with the outside collection agency or attorney.
Net Dollars Placed	StairStep_AccountPlacements	NetDollarsPlaced	Net dollar amount placed with the outside collection agency or attorney.
Placement Month	StairStep_AccountPlacements	PlacementMonth	Date that your organization placed the account with an outside collection agency or attorney.

### Fees

#### Fees

Fees conditions allow you to query accounts based on stair step reporting of monthly fees.

#### Gross

#### Gross

Gross conditions allow you to query accounts based on stair step reporting of gross monthly fees.

<b>Condition</b>	<b>Table</b>	<b>Column</b>	<b>Description</b>
Current Month Fee	StairStep_AccountTransactions	CurrentMonthFee	Gross fees for the current month.
Last Month Fee	StairStep_AccountTransactions	LastMonthFee	Gross fees for last month.
Month 01 Fee	StairStep_AccountTransactions	Month1Fee	Gross fees for month one.
Month 02 Fee	StairStep_AccountTransactions	Month2Fee	Gross fees for month two.
Month 03 Fee	StairStep_AccountTransactions	Month3Fee	Gross fees for month three.
Month 04 Fee	StairStep_AccountTransactions	Month4Fee	Gross fees for month four.
Month 05 Fee	StairStep_AccountTransactions	Month5Fee	Gross fees for month five.
Month 06 Fee	StairStep_AccountTransactions	Month6Fee	Gross fees for month six.
Month 07 Fee	StairStep_AccountTransactions	Month7Fee	Gross fees for month seven.
Month 08 Fee	StairStep_AccountTransactions	Month8Fee	Gross fees for month eight.
Month 09 Fee	StairStep_AccountTransactions	Month9Fee	Gross fees for month nine.
Month 10 Fee	StairStep_AccountTransactions	Month10Fee	Gross fees for month 10.
Month 11 Fee	StairStep_AccountTransactions	Month11Fee	Gross fees for month 11.
Month 12 Fee	StairStep_AccountTransactions	Month12Fee	Gross fees for month 12.
Month 13 Fee	StairStep_AccountTransactions	Month13Fee	Gross fees for month 13.
Month 14 Fee	StairStep_AccountTransactions	Month14Fee	Gross fees for month 14.
Month 15 Fee	StairStep_AccountTransactions	Month15Fee	Gross fees for month 15.
Month 16 Fee	StairStep_AccountTransactions	Month16Fee	Gross fees for month 16.
Month 17 Fee	StairStep_AccountTransactions	Month17Fee	Gross fees for month 17.
Month 18 Fee	StairStep_AccountTransactions	Month18Fee	Gross fees for month 18.
Month 19 Fee	StairStep_AccountTransactions	Month19Fee	Gross fees for month 19.

Account Analysis Conditions Technical Reference

Condition	Table	Column	Description
Month 20 Fee	StairStep_AccountTransactions	Month20Fee	Gross fees for month 20.
Month 21 Fee	StairStep_AccountTransactions	Month21Fee	Gross fees for month 21.
Month 22 Fee	StairStep_AccountTransactions	Month22Fee	Gross fees for month 22.
Month 23 Fee	StairStep_AccountTransactions	Month23Fee	Gross fees for month 23.
Month 24 Fee	StairStep_AccountTransactions	Month24Fee	Gross fees for month 24.
Month 25+ Fee	StairStep_AccountTransactions	Month99Fee	Gross fees for month 25 and after.
Total Fee	StairStep_AccountTransactions	TotalFee	Total gross fees.

**Cumulative**

Cumulative conditions allow you to query accounts based on stair step reporting of cumulative monthly fees.

Condition	Table	Column	Description
Cumulative Month 01 Fee	StairStep_AccountTransactions	CumulativeMonth1Fee	Cumulative fees for month one.
Cumulative Month 02 Fee	StairStep_AccountTransactions	CumulativeMonth2Fee	Cumulative fees for month two.
Cumulative Month 03 Fee	StairStep_AccountTransactions	CumulativeMonth3Fee	Cumulative fees for month three.
Cumulative Month 04 Fee	StairStep_AccountTransactions	CumulativeMonth4Fee	Cumulative fees for month four.
Cumulative Month 05 Fee	StairStep_AccountTransactions	CumulativeMonth5Fee	Cumulative fees for month five.
Cumulative Month 06 Fee	StairStep_AccountTransactions	CumulativeMonth6Fee	Cumulative fees for month six.
Cumulative Month 07 Fee	StairStep_AccountTransactions	CumulativeMonth7Fee	Cumulative fees for month seven.

Condition	Table	Column	Description
Cumulative Month 08 Fee	StairStep_AccountTransactions	CumulativeMonth8Fee	Cumulative fees for month eight.
Cumulative Month 09 Fee	StairStep_AccountTransactions	CumulativeMonth9Fee	Cumulative fees for month nine.
Cumulative Month 10 Fee	StairStep_AccountTransactions	CumulativeMonth10Fee	Cumulative fees for month 10.
Cumulative Month 11 Fee	StairStep_AccountTransactions	CumulativeMonth11Fee	Cumulative fees for month 11.
Cumulative Month 12 Fee	StairStep_AccountTransactions	CumulativeMonth12Fee	Cumulative fees for month 12.
Cumulative Month 13 Fee	StairStep_AccountTransactions	CumulativeMonth13Fee	Cumulative fees for month 13.
Cumulative Month 14 Fee	StairStep_AccountTransactions	CumulativeMonth14Fee	Cumulative fees for month 14.
Cumulative Month 15 Fee	StairStep_AccountTransactions	CumulativeMonth15Fee	Cumulative fees for month 15.
Cumulative Month 16 Fee	StairStep_AccountTransactions	CumulativeMonth16Fee	Cumulative fees for month 16.
Cumulative Month 17 Fee	StairStep_AccountTransactions	CumulativeMonth17Fee	Cumulative fees for month 17.
Cumulative Month 18 Fee	StairStep_AccountTransactions	CumulativeMonth18Fee	Cumulative fees for month 18.
Cumulative Month 19 Fee	StairStep_AccountTransactions	CumulativeMonth19Fee	Cumulative fees for month 19.
Cumulative Month 20 Fee	StairStep_AccountTransactions	CumulativeMonth20Fee	Cumulative fees for month 20.
Cumulative Month 21 Fee	StairStep_AccountTransactions	CumulativeMonth21Fee	Cumulative fees for month 21.

Account Analysis Conditions Technical Reference

Condition	Table	Column	Description
Cumulative Month 22 Fee	StairStep_AccountTransactions	CumulativeMonth22Fee	Cumulative fees for month 22.
Cumulative Month 23 Fee	StairStep_AccountTransactions	CumulativeMonth23Fee	Cumulative fees for month 23.
Cumulative Month 24 Fee	StairStep_AccountTransactions	CumulativeMonth24Fee	Cumulative fees for month 24.
Cumulative Month 25+ Fee	StairStep_AccountTransactions	CumulativeMonth99Fee	Cumulative fees for month 25 and after.

**Invoicable**

**Invoicable**

Invoicable conditions allow you to query accounts based on stair step reporting of monthly invoicing fees.

Condition	Table	Column	Description
Invoicable Current Month Fee	StairStep_AccountTransactions	InvoicableCurrentMonthFee	Invoicable fees for the current month.
Invoicable Last Month Fee	StairStep_AccountTransactions	InvoicableLastMonthFee	Invoicable fees for last month.
Invoicable Month 01 Fee	StairStep_AccountTransactions	InvoicableMonth1Fee	Invoicable fees for month one.
Invoicable Month 02 Fee	StairStep_AccountTransactions	InvoicableMonth2Fee	Invoicable fees for month two.
Invoicable Month 03 Fee	StairStep_AccountTransactions	InvoicableMonth3Fee	Invoicable fees for month three.

<b>Condition</b>	<b>Table</b>	<b>Column</b>	<b>Description</b>
Invoicable Month 04 Fee	StairStep_AccountTransactions	InvoicableMonth4Fee	Invoicable fees for month four.
Invoicable Month 05 Fee	StairStep_AccountTransactions	InvoicableMonth5Fee	Invoicable fees for month five.
Invoicable Month 06 Fee	StairStep_AccountTransactions	InvoicableMonth6Fee	Invoicable fees for month six.
Invoicable Month 07 Fee	StairStep_AccountTransactions	InvoicableMonth7Fee	Invoicable fees for month seven.
Invoicable Month 08 Fee	StairStep_AccountTransactions	InvoicableMonth8Fee	Invoicable fees for month eight.
Invoicable Month 09 Fee	StairStep_AccountTransactions	InvoicableMonth9Fee	Invoicable fees for month nine.
Invoicable Month 10 Fee	StairStep_AccountTransactions	InvoicableMonth10Fee	Invoicable fees for month 10.
Invoicable Month 11 Fee	StairStep_AccountTransactions	InvoicableMonth11Fee	Invoicable fees for month 11.
Invoicable Month 12 Fee	StairStep_AccountTransactions	InvoicableMonth12Fee	Invoicable fees for month 12.
Invoicable Month 13 Fee	StairStep_AccountTransactions	InvoicableMonth13Fee	Invoicable fees for month 13.
Invoicable Month 14 Fee	StairStep_AccountTransactions	InvoicableMonth14Fee	Invoicable fees for month 14.

Account Analysis Conditions Technical Reference

<b>Condition</b>	<b>Table</b>	<b>Column</b>	<b>Description</b>
Invoicable Month 15 Fee	StairStep_AccountTransactions	InvoicableMonth15Fee	Invoicable fees for month 15.
Invoicable Month 16 Fee	StairStep_AccountTransactions	InvoicableMonth16Fee	Invoicable fees for month 16.
Invoicable Month 17 Fee	StairStep_AccountTransactions	InvoicableMonth17Fee	Invoicable fees for month 17.
Invoicable Month 18 Fee	StairStep_AccountTransactions	InvoicableMonth18Fee	Invoicable fees for month 18.
Invoicable Month 19 Fee	StairStep_AccountTransactions	InvoicableMonth19Fee	Invoicable fees for month 19.
Invoicable Month 20 Fee	StairStep_AccountTransactions	InvoicableMonth20Fee	Invoicable fees for month 20.
Invoicable Month 21 Fee	StairStep_AccountTransactions	InvoicableMonth21Fee	Invoicable fees for month 21.
Invoicable Month 22 Fee	StairStep_AccountTransactions	InvoicableMonth22Fee	Invoicable fees for month 22.
Invoicable Month 23 Fee	StairStep_AccountTransactions	InvoicableMonth23Fee	Invoicable fees for month 23.
Invoicable Month 24 Fee	StairStep_AccountTransactions	InvoicableMonth24Fee	Invoicable fees for month 24.
Invoicable Month 25+ Fee	StairStep_AccountTransactions	InvoicableMonth99Fee	Invoicable fees for month 25 and after.



Condition	Table	Column	Description
Invoicable Total Fee	StairStep_AccountTransactions	InvoicableTotalFee	Total invoicable fees.

### Cumulative

Cumulative conditions allow you to query accounts based on stair step reporting of cumulative monthly invoicing fees.

Condition	Table	Column	Description
Cumulative Invoicable Month 01 Fee	StairStep_AccountTransactions	CumulativeInvoicableMonth1Fee	Cumulative invoicable fees for month one.
Cumulative Invoicable Month 02 Fee	StairStep_AccountTransactions	CumulativeInvoicableMonth2Fee	Cumulative invoicable fees for month two.
Cumulative Invoicable Month 03 Fee	StairStep_AccountTransactions	CumulativeInvoicableMonth3Fee	Cumulative invoicable fees for month three.
Cumulative Invoicable Month 04 Fee	StairStep_AccountTransactions	CumulativeInvoicableMonth4Fee	Cumulative invoicable fees for month four.
Cumulative Invoicable Month 05 Fee	StairStep_AccountTransactions	CumulativeInvoicableMonth5Fee	Cumulative invoicable fees for month five.
Cumulative Invoicable Month 06 Fee	StairStep_AccountTransactions	CumulativeInvoicableMonth6Fee	Cumulative invoicable fees for month six.
Cumulative Invoicable	StairStep_AccountTransactions	CumulativeInvoicableMonth7Fee	Cumulative invoicable fees for month seven.

Account Analysis Conditions Technical Reference

<b>Condition</b>	<b>Table</b>	<b>Column</b>	<b>Description</b>
Month 07 Fee			
Cumulative Invoicable Month 08 Fee	StairStep_AccountTransactions	CumulativeInvoicableMonth8Fee	Cumulative invoicable fees for month eight.
Cumulative Invoicable Month 09 Fee	StairStep_AccountTransactions	CumulativeInvoicableMonth9Fee	Cumulative invoicable fees for month nine.
Cumulative Invoicable Month 10 Fee	StairStep_AccountTransactions	CumulativeInvoicableMonth10Fee	Cumulative invoicable fees for month 10.
Cumulative Invoicable Month 11 Fee	StairStep_AccountTransactions	CumulativeInvoicableMonth11Fee	Cumulative invoicable fees for month 11.
Cumulative Invoicable Month 12 Fee	StairStep_AccountTransactions	CumulativeInvoicableMonth12Fee	Cumulative invoicable fees for month 12.
Cumulative Invoicable Month 13 Fee	StairStep_AccountTransactions	CumulativeInvoicableMonth13Fee	Cumulative invoicable fees for month 13.
Cumulative Invoicable Month 14 Fee	StairStep_AccountTransactions	CumulativeInvoicableMonth14Fee	Cumulative invoicable fees for month 14.
Cumulative Invoicable Month 15 Fee	StairStep_AccountTransactions	CumulativeInvoicableMonth15Fee	Cumulative invoicable fees for month 15.

<b>Condition</b>	<b>Table</b>	<b>Column</b>	<b>Description</b>
Cumulative Invoicable Month 16 Fee	StairStep_AccountTransactions	CumulativeInvoicableMonth16Fee	Cumulative invoicable fees for month 16.
Cumulative Invoicable Month 17 Fee	StairStep_AccountTransactions	CumulativeInvoicableMonth17Fee	Cumulative invoicable fees for month 17.
Cumulative Invoicable Month 18 Fee	StairStep_AccountTransactions	CumulativeInvoicableMonth18Fee	Cumulative invoicable fees for month 18.
Cumulative Invoicable Month 19 Fee	StairStep_AccountTransactions	CumulativeInvoicableMonth19Fee	Cumulative invoicable fees for month 19.
Cumulative Invoicable Month 20 Fee	StairStep_AccountTransactions	CumulativeInvoicableMonth20Fee	Cumulative invoicable fees for month 20.
Cumulative Invoicable Month 21 Fee	StairStep_AccountTransactions	CumulativeInvoicableMonth21Fee	Cumulative invoicable fees for month 21.
Cumulative Invoicable Month 22 Fee	StairStep_AccountTransactions	CumulativeInvoicableMonth22Fee	Cumulative invoicable fees for month 22.
Cumulative Invoicable Month 23 Fee	StairStep_AccountTransactions	CumulativeInvoicableMonth23Fee	Cumulative invoicable fees for month 23.
Cumulative Invoicable	StairStep_AccountTransactions	CumulativeInvoicableMonth24Fee	Cumulative invoicable fees for month 24.

## Account Analysis Conditions Technical Reference

Condition	Table	Column	Description
Month 24 Fee			
Cumulative Invoicable Month 25+ Fee	StairStep_AccountTransactions	CumulativeInvoicableMonth99Fee	Cumulative invoicable fees for month 25 and after.

### Gross

#### Gross

Gross conditions allow you to query accounts based on stair step reporting of gross monthly payments.

Condition	Table	Column	Description
Current Month	StairStep_AccountTransactions	CurrentMonth	Gross payments for the current month.
Last Month	StairStep_AccountTransactions	LastMonth	Gross payments for last month.
Month 01	StairStep_AccountTransactions	Month1	Gross payments for month one.
Month 02	StairStep_AccountTransactions	Month2	Gross payments for month two.
Month 03	StairStep_AccountTransactions	Month3	Gross payments for month three.
Month 04	StairStep_AccountTransactions	Month4	Gross payments for month four.
Month 05	StairStep_AccountTransactions	Month5	Gross payments for month five.
Month 06	StairStep_AccountTransactions	Month6	Gross payments for month six.
Month 07	StairStep_AccountTransactions	Month7	Gross payments for month seven.
Month 08	StairStep_AccountTransactions	Month8	Gross payments for month eight.
Month 09	StairStep_AccountTransactions	Month9	Gross payments for month nine.
Month 10	StairStep_AccountTransactions	Month10	Gross payments for month 10.
Month 11	StairStep_AccountTransactions	Month11	Gross payments for month 11.
Month 12	StairStep_AccountTransactions	Month12	Gross payments for month 12.

Condition	Table	Column	Description
Month 13	StairStep_AccountTransactions	Month13	Gross payments for month 13.
Month 14	StairStep_AccountTransactions	Month14	Gross payments for month 14.
Month 15	StairStep_AccountTransactions	Month15	Gross payments for month 15.
Month 16	StairStep_AccountTransactions	Month16	Gross payments for month 16.
Month 17	StairStep_AccountTransactions	Month17	Gross payments for month 17.
Month 18	StairStep_AccountTransactions	Month18	Gross payments for month 18.
Month 19	StairStep_AccountTransactions	Month19	Gross payments for month 19.
Month 20	StairStep_AccountTransactions	Month20	Gross payments for month 20.
Month 21	StairStep_AccountTransactions	Month21	Gross payments for month 21.
Month 22	StairStep_AccountTransactions	Month22	Gross payments for month 22.
Month 23	StairStep_AccountTransactions	Month23	Gross payments for month 23.
Month 24	StairStep_AccountTransactions	Month24	Gross payments for month 24.
Month 25+	StairStep_AccountTransactions	Month99	Gross payments for month 25 and after.

### Cumulative

Cumulative conditions allow you to query accounts based on stair step reporting of cumulative gross monthly payments.

Condition	Table	Column	Description
Cumulative Month 01	StairStep_AccountTransactions	CumulativeMonth1	Cumulative gross payments for month one.
Cumulative Month 02	StairStep_AccountTransactions	CumulativeMonth2	Cumulative gross payments for month two.
Cumulative Month 03	StairStep_AccountTransactions	CumulativeMonth3	Cumulative gross payments for month three.

Account Analysis Conditions Technical Reference

<b>Condition</b>	<b>Table</b>	<b>Column</b>	<b>Description</b>
Cumulative Month 04	StairStep_AccountTransactions	CumulativeMonth4	Cumulative gross payments for month four.
Cumulative Month 05	StairStep_AccountTransactions	CumulativeMonth5	Cumulative gross payments for month five.
Cumulative Month 06	StairStep_AccountTransactions	CumulativeMonth6	Cumulative gross payments for month six.
Cumulative Month 07	StairStep_AccountTransactions	CumulativeMonth7	Cumulative gross payments for month seven.
Cumulative Month 08	StairStep_AccountTransactions	CumulativeMonth8	Cumulative gross payments for month eight.
Cumulative Month 09	StairStep_AccountTransactions	CumulativeMonth9	Cumulative gross payments for month nine.
Cumulative Month 10	StairStep_AccountTransactions	CumulativeMonth10	Cumulative gross payments for month 10.
Cumulative Month 11	StairStep_AccountTransactions	CumulativeMonth11	Cumulative gross payments for month 11.
Cumulative Month 12	StairStep_AccountTransactions	CumulativeMonth12	Cumulative gross payments for month 12.
Cumulative Month 13	StairStep_AccountTransactions	CumulativeMonth13	Cumulative gross payments for month 13.
Cumulative Month 14	StairStep_AccountTransactions	CumulativeMonth14	Cumulative gross payments for month 14.
Cumulative Month 15	StairStep_AccountTransactions	CumulativeMonth15	Cumulative gross payments for month 15.
Cumulative Month 16	StairStep_AccountTransactions	CumulativeMonth16	Cumulative gross payments for month 16.
Cumulative Month 17	StairStep_AccountTransactions	CumulativeMonth17	Cumulative gross payments for month 17.

Condition	Table	Column	Description
Cumulative Month 18	StairStep_AccountTransactions	CumulativeMonth18	Cumulative gross payments for month 18.
Cumulative Month 19	StairStep_AccountTransactions	CumulativeMonth19	Cumulative gross payments for month 19.
Cumulative Month 20	StairStep_AccountTransactions	CumulativeMonth20	Cumulative gross payments for month 20.
Cumulative Month 21	StairStep_AccountTransactions	CumulativeMonth21	Cumulative gross payments for month 21.
Cumulative Month 22	StairStep_AccountTransactions	CumulativeMonth22	Cumulative gross payments for month 22.
Cumulative Month 23	StairStep_AccountTransactions	CumulativeMonth23	Cumulative gross payments for month 23.
Cumulative Month 24	StairStep_AccountTransactions	CumulativeMonth24	Cumulative gross payments for month 24.
Cumulative Month 25+	StairStep_AccountTransactions	CumulativeMonth99	Cumulative gross payments for month 25 and after.

## Invoicable

### Invoicable

Invoicable conditions allow you to query accounts based on stair step reporting of monthly invoicable payments.

Condition	Table	Column	Description
Invoicable Current Month	StairStep_AccountTransactions	InvoicableCurrentMonth	Invoicable payments for the current month.
Invoicable Last Month	StairStep_AccountTransactions	InvoicableLastMonth	Invoicable payments for last month.
Invoicable Month 01	StairStep_AccountTransactions	InvoicableMonth1	Invoicable payments for month one.

Account Analysis Conditions Technical Reference

<b>Condition</b>	<b>Table</b>	<b>Column</b>	<b>Description</b>
Invoicable Month 02	StairStep_AccountTransactions	InvoicableMonth2	Invoicable payments for month two.
Invoicable Month 03	StairStep_AccountTransactions	InvoicableMonth3	Invoicable payments for month three.
Invoicable Month 04	StairStep_AccountTransactions	InvoicableMonth4	Invoicable payments for month four.
Invoicable Month 05	StairStep_AccountTransactions	InvoicableMonth5	Invoicable payments for month five.
Invoicable Month 06	StairStep_AccountTransactions	InvoicableMonth6	Invoicable payments for month six.
Invoicable Month 07	StairStep_AccountTransactions	InvoicableMonth7	Invoicable payments for month seven.
Invoicable Month 08	StairStep_AccountTransactions	InvoicableMonth8	Invoicable payments for month eight.
Invoicable Month 09	StairStep_AccountTransactions	InvoicableMonth9	Invoicable payments for month nine.
Invoicable Month 10	StairStep_AccountTransactions	InvoicableMonth10	Invoicable payments for month 10.
Invoicable Month 11	StairStep_AccountTransactions	InvoicableMonth11	Invoicable payments for month 11.
Invoicable Month 12	StairStep_AccountTransactions	InvoicableMonth12	Invoicable payments for month 12.
Invoicable Month 13	StairStep_AccountTransactions	InvoicableMonth13	Invoicable payments for month 13.
Invoicable Month 14	StairStep_AccountTransactions	InvoicableMonth14	Invoicable payments for month 14.
Invoicable Month 15	StairStep_AccountTransactions	InvoicableMonth15	Invoicable payments for month 15.



<b>Condition</b>	<b>Table</b>	<b>Column</b>	<b>Description</b>
Invoicable Month 16	StairStep_AccountTransactions	InvoicableMonth16	Invoicable payments for month 16.
Invoicable Month 17	StairStep_AccountTransactions	InvoicableMonth17	Invoicable payments for month 17.
Invoicable Month 18	StairStep_AccountTransactions	InvoicableMonth18	Invoicable payments for month 18.
Invoicable Month 19	StairStep_AccountTransactions	InvoicableMonth19	Invoicable payments for month 19.
Invoicable Month 20	StairStep_AccountTransactions	InvoicableMonth20	Invoicable payments for month 20.
Invoicable Month 21	StairStep_AccountTransactions	InvoicableMonth21	Invoicable payments for month 21.
Invoicable Month 22	StairStep_AccountTransactions	InvoicableMonth22	Invoicable payments for month 22.
Invoicable Month 23	StairStep_AccountTransactions	InvoicableMonth23	Invoicable payments for month 23.
Invoicable Month 24	StairStep_AccountTransactions	InvoicableMonth24	Invoicable payments for month 24.
Invoicable Month 25+	StairStep_AccountTransactions	InvoicableMonth99	Invoicable payments for month 25 and after.

### **Cumulative**

Cumulative conditions allow you to query accounts based on stair step reporting of cumulative monthly invoicing payments.

<b>Condition</b>	<b>Table</b>	<b>Column</b>	<b>Description</b>
Cumulative Invoicable Month 01	StairStep_AccountTransactions	CumulativeInvoicableMonth1	Cumulative invoicable payments for month one.
Cumulative Invoicable Month 02	StairStep_AccountTransactions	CumulativeInvoicableMonth2	Cumulative invoicable payments for month two.

Account Analysis Conditions Technical Reference

<b>Condition</b>	<b>Table</b>	<b>Column</b>	<b>Description</b>
Cumulative Invoicable Month 03	StairStep_AccountTransactions	CumulativeInvoicableMonth3	Cumulative invoicable payments for month three.
Cumulative Invoicable Month 04	StairStep_AccountTransactions	CumulativeInvoicableMonth4	Cumulative invoicable payments for month four.
Cumulative Invoicable Month 05	StairStep_AccountTransactions	CumulativeInvoicableMonth5	Cumulative invoicable payments for month five.
Cumulative Invoicable Month 06	StairStep_AccountTransactions	CumulativeInvoicableMonth6	Cumulative invoicable payments for month six.
Cumulative Invoicable Month 07	StairStep_AccountTransactions	CumulativeInvoicableMonth7	Cumulative invoicable payments for month seven.
Cumulative Invoicable Month 08	StairStep_AccountTransactions	CumulativeInvoicableMonth8	Cumulative invoicable payments for month eight.
Cumulative Invoicable Month 09	StairStep_AccountTransactions	CumulativeInvoicableMonth9	Cumulative invoicable payments for month nine.
Cumulative Invoicable Month 10	StairStep_AccountTransactions	CumulativeInvoicableMonth10	Cumulative invoicable payments for month 10.
Cumulative Invoicable Month 11	StairStep_AccountTransactions	CumulativeInvoicableMonth11	Cumulative invoicable payments for month 11.
Cumulative Invoicable Month 12	StairStep_AccountTransactions	CumulativeInvoicableMonth12	Cumulative invoicable payments for month 12.
Cumulative Invoicable Month 13	StairStep_AccountTransactions	CumulativeInvoicableMonth13	Cumulative invoicable payments for month 13.

<b>Condition</b>	<b>Table</b>	<b>Column</b>	<b>Description</b>
Cumulative Invoicable Month 14	StairStep_AccountTransactions	CumulativeInvoicableMonth14	Cumulative invoicable payments for month 14.
Cumulative Invoicable Month 15	StairStep_AccountTransactions	CumulativeInvoicableMonth15	Cumulative invoicable payments for month 15.
Cumulative Invoicable Month 16	StairStep_AccountTransactions	CumulativeInvoicableMonth16	Cumulative invoicable payments for month 16.
Cumulative Invoicable Month 17	StairStep_AccountTransactions	CumulativeInvoicableMonth17	Cumulative invoicable payments for month 17.
Cumulative Invoicable Month 18	StairStep_AccountTransactions	CumulativeInvoicableMonth18	Cumulative invoicable payments for month 18.
Cumulative Invoicable Month 19	StairStep_AccountTransactions	CumulativeInvoicableMonth19	Cumulative invoicable payments for month 19.
Cumulative Invoicable Month 20	StairStep_AccountTransactions	CumulativeInvoicableMonth20	Cumulative invoicable payments for month 20.
Cumulative Invoicable Month 21	StairStep_AccountTransactions	CumulativeInvoicableMonth21	Cumulative invoicable payments for month 21.
Cumulative Invoicable Month 22	StairStep_AccountTransactions	CumulativeInvoicableMonth22	Cumulative invoicable payments for month 22.
Cumulative Invoicable Month 23	StairStep_AccountTransactions	CumulativeInvoicableMonth23	Cumulative invoicable payments for month 23.
Cumulative Invoicable Month 24	StairStep_AccountTransactions	CumulativeInvoicableMonth24	Cumulative invoicable payments for month 24.

Condition	Table	Column	Description
Cumulative Invoicable Month 25+	StairStep_AccountTransactions	CumulativeInvoicableMonth99	Cumulative invoicable payments for month 25 and after.

### Transaction History

Transaction History conditions allow you to query accounts based on payment transaction history criteria.

Condition	Table	Column	Description
Check Number	PayHistory	Checknbr	Check number to pay the invoice.
Invoice Date	PayHistory	Invoiced	Date on the invoice.
Invoice Number	PayHistory	Invoice	Invoice number.
Net Tax amount	PayHistory	Tax	Net tax amount.
Overpayment Amount	PayHistory	OverPaidAmt	Overpayment amount.
Total Transaction Amount	PayHistory	TotalPaid	Total transaction amount.
Transaction Batch Number	PayHistory	BatchNumber	Number that Latitude assigns to identify the transaction batch.
Transaction Batch Type	PayHistory	BatchType	Type of transaction batch, such as payment, reversal, or balance adjustment.
Transaction Comment	PayHistory	Comment	Comment regarding the transaction.
Transaction Date	PayHistory	DatePaid	Date the transaction occurred.
Transaction Desk	PayHistory	Desk	Desk associated to the transaction.
Transaction Entered Date	PayHistory	Entered	Date a user added the transaction.
Transaction Fee	PayHistory	Calculated	Sum of Fee1 through Fee10.

Condition	Table	Column	Description
Transaction id	PayHistory	UID	Code that Latitude assigned to identify a transaction in the batch.
Transaction is Correction?	PayHistory	IsCorrection	Transaction is or isn't a correction.
Transaction Reversed?	PayHistory		Transaction is or isn't a reversal.
Transaction System Month	PayHistory	SystemMonth	System month in which the transaction occurred.
Transaction Type?	PayHistory	BatchType	Type of transaction batch, such as payment, reversal, or balance adjustment.

## Portfolio Contacts

### Portfolio Contacts

Portfolio Contacts conditions allow you to query accounts based on portfolio contacts criteria.

### Debt Buyer Groups

Debt Buyer Groups conditions allow you to query accounts based on criteria for debt buyer groups.

Condition	Table	Column	Description
City	AIM_Group	City	Debt buyer group's city.
Description	AIM_Group	Description	Description of the debt buyer's group.
Fax	AIM_Group	Fax	Debt buyer group's fax number.
Phone	AIM_Group	Phone	Debt buyer group's phone number.
State	AIM_Group	State	Debt buyer group's state.
Street1	AIM_Group	Street1	Line 1 of the debt buyer group's street address.
Street2	AIM_Group	Street2	Line 2 of the debt buyer group's street address.
Zipcode	AIM_Group	ZipCode	Debt buyer group's postal code.

## Demographics

Demographics conditions allow you to query accounts based on demographic criteria for portfolio contacts.

Condition	Table	Column	Description
Address	AIM_Contact	Address	Line 1 of the company's street address.
Address2	AIM_Contact	Address2	Line 2 of the company's street address.
City	AIM_Contact	City	Contact company's city.
Company	AIM_Contact	Company	Company's name.
CreatedBy	AIM_Contact	CreatedBy	User who added the contact information.
DebtorLine	AIM_Contact	DebtorLine	Debtor's phone number.
Direct	AIM_Contact	Direct	Contact person's direct phone number.
Email	AIM_Contact	Email	Contact person's email address.
Email2	AIM_Contact	Email2	Contact person's second email address.
Fax	AIM_Contact	Fax	Company fax number.
FirstName	AIM_Contact	FirstName	Contact person's first name.
Home	AIM_Contact	Home	Contact person's home phone number.
LastName	AIM_Contact	LastName	Contact person's last name.
MiddleName	AIM_Contact	MiddleName	Contact person's middle name.
Mobile	AIM_Contact	Mobile	Contact person's cell phone number.
Name	AIM_Contact	Name	Contact person's full name.
OtherPhone	AIM_Contact	OtherPhone	Contact person's second phone.
Phone	AIM_Contact	Phone	Company phone number.
ReferredBy	AIM_Contact	ReferredBy	Person who referred the portfolio.

Condition	Table	Column	Description
Role	AIM_Contact	Role	Contact person's role.
Source	AIM_Contact	Source	Source of the referral.
State	AIM_Contact	State	Company's state.
UpdatedBy	AIM_Contact	UpdatedBy	User who updated the contact information.
WebSite	AIM_Contact	WebSite	Company's website address.
Zip	AIM_Contact	Zip	Company's postal code.

## Preferences

Preferences conditions allow you to query accounts based on preferences criteria for portfolio contacts.

Condition	Table	Column	Description
Membership	AIM_ContactMembershipASSN	MembershipID	Contact person has a membership in the organization (for example, American Collectors Association).
Paper Type	AIM_ContactPaperASSN	PaperTypeID	Portfolio contains the paper type (for example, student loans or credit cards).
State	AIM_ContactStateASSN	StateCode	Contact's preferred states (for example, states where the contact is licensed).

## Portfolios

Portfolios conditions allow you to query accounts based on portfolio criteria.

Condition	Table	Column	Description
Amount	AIM_Portfolio	Amount	Total portfolio balance.
Buyer Name	AIM_Portfolio	BuyerGroupID	Name of the portfolio buyer group.
Code	AIM_Portfolio	Code	Name of the portfolio.

Condition	Table	Column	Description
ContractDate	AIM_Portfolio	ContractDate	Date on the sales contract.
CultureCode	AIM_Portfolio	CultureCode	Portfolio currency type.
Description	AIM_Portfolio	Description	Description of the sale (for example, type of debt sold, original creditor).
GeneralLedgerID	AIM_Portfolio	GeneralLedgerID	Code that your organization assigns to associate the portfolio to a general ledger item in another accounting system.
Investor Name	AIM_Portfolio	InvestorGroupID	Investor group associated to the portfolio purchase.
OriginalFaceValue	AIM_Portfolio	OriginalFaceValue	Original face value of the portfolio.
Portfolio Type	AIM_Portfolio	PortfolioTypeID	Type of portfolio.
PortfolioID	AIM_Portfolio	PortfolioID	Unique code that Portfolio Manager assigned to identify the portfolio.
Seller Name	AIM_Portfolio	SellerGroupID	Name of the person who sold the portfolio.
SellerLotNumber	AIM_Portfolio	SellerLotNumber	Portfolio lot number.

## Post Dates

### Post Dates

Post Dates conditions allow you to query accounts based on post-dated check and credit card criteria.

Condition	Table	Column	Description
Has Linked Post-Dates		Calculated	Linked account does or doesn't have post-dated checks or credit cards.
Has Post-Dates		Calculated	Account does or doesn't have post-dated checks or credit cards.



## Post-Dated Checks

### Post-Dated Checks

Post-Dated Checks conditions allow you to query accounts based on post-dated checks criteria.

Condition	Table	Column	Description
Has Linked Post-Dated Checks?		Calculated	Linked account does or doesn't have post-dated checks.
Has Post-Dated Checks?		Calculated	Account does or doesn't have post-dated checks.
Next Check Amount		Calculated	Next post-dated check amount.
Next Deposit Date		Calculated	Next post-dated check deposit date.
Number of Post-Dated Checks		Calculated	Number of post-dated checks for the account.
Total Check Amount		Calculated	Total check amount.

### Current Post-Dated Checks

Current Post-Dated Checks conditions allow you to query accounts based on current post-dated checks criteria.

Condition	Table	Column	Description
Post-Dated Type	ScheduledACH	PDC_Type	Post-dated payment method.
Post-Dated Active?	ScheduledACH	Active	Post-dated check is or isn't active.
Post-Dated Check Amount	ScheduledACH	Amount	Post-dated check amount.

Condition	Table	Column	Description
Post-Dated Check Approved By	ScheduledACH	ApprovedBy	User who approved the post-dated check transaction.
Post-Dated Check Deposit Date	ScheduledACH	Deposit	Post-dated check deposit date.
Post-Dated Check Entered Date	ScheduledACH	Entered	Date the user added the post-dated check.
Post-Dated Check Number	ScheduledACH	CheckNbr	Post-dated check number.
Post-Dated Check On Hold Date	ScheduledACH	OnHold	Date a user placed the post-dated check transaction on hold.
Post-Dated Check Printed?	ScheduledACH	Printed	User did or didn't print the post-dated check transaction.
Post-Dated Check Projected Fee	ScheduledACH	ProjectedFee	Post-dated check projected fee.
Post-Dated Check Surcharge	ScheduledACH	Surcharge	Post-dated check surcharge.

### Post-Dated Credit Cards

#### Post-Dated Credit Cards

Post-Dated Credit Cards conditions allow you to query accounts based on post-dated credit card criteria.

Condition	Table	Column	Description
Has Linked Post-Dated Credit Cards?		Calculated	Linked account does or doesn't have post-dated credit card transactions.

Condition	Table	Column	Description
Has Post-Dated Credit Cards?		Calculated	Account does or doesn't have post-dated credit card transactions.
Next Credit Card Amount		Calculated	Next post-dated credit card transaction amount.
Next Credit Card Date		Calculated	Next post-dated credit card transaction date.
Total Credit Card Amount		Calculated	Total post-dated credit card transaction amount.

### Current Post-Dated Credit Cards

Current Post-Dated Credit Cards conditions allow you to query accounts based on current post-dated credit card criteria.

Condition	Table	Column	Description
Post-Dated Credit Card Amount	ScheduledCreditCard	Amount	Post-dated credit card transaction amount.
Post-Dated Credit Card Approved By	ScheduledCreditCard	ApprovedBy	User who approved the post-dated credit card transaction.
Post-Dated Credit Card Approved Date	ScheduledCreditCard	Approved	Date the user approved the post-dated credit card transaction.
Post-Dated Credit Card Authorization Date	ScheduledCreditCard	AuthDate	Date the financial institution authorized the post-dated credit card transaction.
Post-Dated Credit Card Batch Number	ScheduledCreditCard	BatchNumber	Post-dated credit card transaction batch number.
Post-Dated Credit Card Collector Fee	ScheduledCreditCard	CollectorFee	Collector fees for the post-dated credit card transaction.

Account Analysis Conditions Technical Reference

<b>Condition</b>	<b>Table</b>	<b>Column</b>	<b>Description</b>
Post-Dated Credit Card Deposit Date	ScheduledCreditCard	DepositDate	Post-dated credit card deposit date.
Post-Dated Credit Card Entered Date	ScheduledCreditCard	DateEntered	Date the user added the post-dated credit card transaction to the system.
Post-Dated Credit Card Expiration Date	ScheduledCreditCard	EXPYear and EXPMonth	Year and month the post-dated credit card expires.
Post-Dated Credit Card Is Active?	ScheduledCreditCard	IsActive	Post-dated credit card is or isn't active.
Post-Dated Credit Card NITD Sent Date	ScheduledCreditCard	NITDSentDate	Date the user sent the Notice of Intent to Deposit letter to the customer.
Post-Dated Credit Card Number	ScheduledCreditCard	CardNumber	Post-dated credit card number.
Post-Dated Credit Card On Hold Date	ScheduledCreditCard	OnHoldDate	Date a user placed the post-dated credit card transaction on hold.
Post-Dated Credit Card Printed?	ScheduledCreditCard	Printed	User did or didn't print the post-dated credit card transaction.
Post-Dated Credit Card Projected Fee	ScheduledCreditCard	ProjectedFee	Post-dated credit card transaction projected fee.
Post-Dated Credit Card Surcharge	ScheduledCreditCard	Surcharge	Post-dated credit card surcharge.

## Promises

### Promises

Promises conditions allow you to query accounts based on criteria for payment promises.

Condition	Table	Column	Description
Broken Promise Date	Master	BPDate	Date the debtor promised to pay on the account but didn't.
Created By	Promises	CreatedBy	User who added the broken promise information.
Linked Promise to Pay?		Calculated	Debtor did or didn't promise to pay any of the linked accounts.
Next Promise Amount		Calculated	Next payment promise amount.
Next Promise Date		Calculated	Next payment promise date.
Number of Promises		Calculated	Number of promises on the account.
Promised to Pay?		Calculated	Debtor did or didn't promise to pay on the account.
Total Promise Amount		Calculated	Total amount the debtor promised to pay on the account.

### Current Promises

Current Promises conditions allow you to query accounts based on criteria for current payment promises.

Condition	Table	Column	Description
Promise Amount	ScheduledPromise	Amount	Amount the debtor promised to pay on the account.
Promise Approved By	ScheduledPromise	ApprovedBy	User who approved the payment promise.
Promise Desk	ScheduledPromise	Desk	User desk associated to the payment promise.

Condition	Table	Column	Description
Promise Due Date	ScheduledPromise	DueDate	Date the debtor promised to pay on the account.
Promise Entered Date	ScheduledPromise	Entered	Date the user added the promise to the account.
Promise Kept?		Calculated	Debtor did or didn't keep the promise to pay.
Promise Mode	ScheduledPromise	PromiseMode	Frequency in which the debtor promised to pay (for example weekly, monthly).
Promise Suspended?	ScheduledPromise	Suspended	Promise is or isn't suspended.

## Restrictions

### Restrictions

Restrictions conditions allow you to query accounts based on criteria for account restrictions.

Condition	Table	Column	Description
Debtor Disputes?	Restrictions	Disputed	Debtor does or doesn't dispute the debt.
Has Restrictions?	Restrictions	Home, Job, Calls, Disputed, SuppressLetters	Debtor does or doesn't have account restrictions.
Suppress Calls?	Restrictions	Calls	Debtor does or doesn't want calls suppressed.
Suppress Letters?	Restrictions	SuppressLetters	Debtor does or doesn't want letters suppressed.

## Assets

### Assets

Assets conditions allow you to query accounts based on account restriction criteria for account assets.

Condition	Table	Column	Description
Has Assets?	Debtor_Assets	DebtorID	Debtor does or doesn't have assets.
Total Lien Amount of Assets	Debtor_Assets	LienAmount	Total amount held against the debtor's assets.
Total Value of Assets	Debtor_Assets	CurrentValue	Total value of the debtor's assets.
Total Verified Lien Amount of Assets	Debtor_Assets		Total lien amount of the debtor's assets that your organization verified.
Total Verified Value of Assets	Debtor_Assets		Total value of the debtor's assets that your organization verified.

### Individual Assets

Individual Assets conditions allow you to query accounts based on account restriction criteria for individual assets.

Condition	Table	Column	Description
Asset Description	Debtor_Assets	Description	Description of the debtor's asset.
Asset Lien Value	Debtor_Assets	LienAmount	Amount held against the asset.
Asset Lien Value Verified	Debtor_Assets	LienVerified	Your organization did or didn't verify the asset's lien value.
Asset Name	Debtor_Assets	Name	Name of the debtor's asset.
Asset Type	Debtor_Assets	AssetType	Type of asset.
Asset Value	Debtor_Assets	CurrentValue	Current value of the asset.
Asset Value Verified?	Debtor_Assets	ValueVerified	Your organization did or didn't verify the asset's current value.

### Attorney

Attorney conditions allow you to query accounts based on account restriction criteria for attorneys.

Condition	Table	Column	Description
Attorney City	DebtorAttorneys	City	City of the debtor's attorney.
Attorney Comment	DebtorAttorneys	Comments	Comment regarding the debtor's attorney.
Attorney Email Address	DebtorAttorneys	Email	Email address of the debtor's attorney.
Attorney Fax Number	DebtorAttorneys	Fax	Fax number of the debtor's attorney.
Attorney Firm Name	DebtorAttorneys	Firm	Firm name of the debtor's attorney.
Attorney Name	DebtorAttorneys	Name	Name of the debtor's attorney.
Attorney Phone Number	DebtorAttorneys	Phone	Phone number of the debtor's attorney.
Attorney State	DebtorAttorneys	State	State of the debtor's attorney.
Attorney Street 1	DebtorAttorneys	Addr1	Line 1 of the street address of the debtor's attorney.
Attorney Street 2	DebtorAttorneys	Addr2	Line 2 of the street address of the debtor's attorney.
Attorney Zip Code	DebtorAttorneys	ZipCode	Postal code of the debtor's attorney.
Represented By Attorney?	DebtorAttorneys		Debtor does or doesn't have attorney representation.

## Bankruptcy

### Bankruptcy

Bankruptcy conditions allow you to query accounts based on account restriction criteria for bankruptcies.



Condition	Table	Column	Description
Bankruptcy Case Number	Bankruptcy	CaseNumber	Case number the court assigned to the bankruptcy.
Bankruptcy Chapter	Bankruptcy	Chapter	Bankruptcy chapter number.
Bankruptcy Comment	Bankruptcy	Comments	Comment regarding the bankruptcy.
Bankruptcy Filed Date	Bankruptcy	DateFiled	Date the debtor filed the case with the bankruptcy court.
Bankruptcy Status	Bankruptcy	Status	Status of the bankruptcy.
Has Filed for Bankruptcy?	Bankruptcy	Calculated	Debtor has or hasn't filed for bankruptcy.
Meeting of Creditors Date	Bankruptcy	DateTime341	Date of the creditor meeting.
Meeting of Creditors Location	Bankruptcy	Location341	Location of the creditor meeting.
Meeting of Creditors Scheduled?	Bankruptcy	Has341Info	Creditor meeting is or isn't scheduled.

### Court Information

Court Information conditions allow you to query accounts based on account restriction criteria for bankruptcy courts.

Condition	Table	Column	Description
Bankruptcy Court District	Bankruptcy	CourtDistrict	Bankruptcy court district.
Bankruptcy Court Division	Bankruptcy	CourtDivision	Bankruptcy court division.

Condition	Table	Column	Description
Bankruptcy Court Phone Number	Bankruptcy	CourtPhone	Bankruptcy court phone number.
Bankruptcy Court State	Bankruptcy	CourtState	Bankruptcy court state.
Bankruptcy Court Street 1	Bankruptcy	CourtStreet1	Line 1 of the bankruptcy courts's street address.
Bankruptcy Court Street 2	Bankruptcy	CourtStreet2	Line 2 of the bankruptcy court's street address.
Bankruptcy Court Zip Code	Bankruptcy	CourtZipCode	Bankruptcy court postal code.

### Trustee Information

Trustee Information conditions allow you to query accounts based on account restriction criteria for bankruptcy court trustees.

Condition	Table	Column	Description
Trustee City	Bankruptcy	TrusteeCity	Trustee's city.
Trustee Name	Bankruptcy	Trustee	Trustee's name.
Trustee Phone Number	Bankruptcy	TrusteePhone	Trustee's phone number.
Trustee State	Bankruptcy	TrusteeState	Trustee's state.
Trustee Street 1	Bankruptcy	TrusteeStreet1	Line 1 of the trustee's street address.
Trustee Street 2	Bankruptcy	TrusteeStreet2	Line 2 of the trustee's street address.
Trustee Zip Code	Bankruptcy	TrusteeZipCode	Trustee's postal code.

### Deceased

Deceased conditions allow you to query accounts based on account restriction criteria for deceased customers.

Condition	Table	Column	Description
Debtor is Deceased?	Deceased		Debtor is or isn't deceased.
Deceased Date	Deceased	DOD	Date of the debtor's death.

## Work Strategies

### Work Strategies

Work Strategies conditions allow you to query accounts based on criteria for work strategies.

Condition	Table	Column	Description
Contacted Today?	Master	Contacted	User did or didn't contact the account during the specified time period.
Last Contacted Date	Master	Contacted	Date a user last contacted the account.
Last Worked Date	Master	Worked	Date a user last worked the account.
Times Contacted	Master	TotalContacted	Number of times users contacted the account.
Times Viewed	Master	TotalViewed	Number of times users viewed the account.
Times Worked	Master	TotalWorked	Number of times users worked the account.
Worked Today?	Master	Worked	User did or didn't work the account during the specified time period.

### Blank Literal Condition

Blank Literal Condition allows you to query accounts based on a SQL statement that you create.

## Change Log

The following table lists the changes to the *Account Analysis Conditions Technical Reference* since its initial release.

Date	Change
21-March-2017	Added the following compliance conditions: <ul style="list-style-type: none"> <li>• Care and Hardship, which allows querying accounts based on care and financial hardship criteria.</li> <li>• Complaint, which allows querying accounts based on complaint criteria.</li> <li>• Dispute, which allows querying accounts based on dispute criteria.</li> <li>• Income and Expenditure, which allows querying accounts based on income and expenditure criteria.</li> </ul>
19-June-2017	Added the following credit reporting conditions: <ul style="list-style-type: none"> <li>• <code>cbrDataPaidByInsurance</code>, which allows querying medical accounts that insurance paid.</li> <li>• <code>cbrDataPendingExceptionDtlv</code>, which allows querying accounts based on credit reporting exceptions.</li> </ul>
02-February-2018	Changed document format.
19-October-2018	<ul style="list-style-type: none"> <li>• Replaced Copyright and Trademark statement with a link to it.</li> <li>• Rebranded Interaction Collector to Latitude by Genesys.</li> </ul>
09-November-2018	Added "Needs Review" condition, which allows querying accounts with arrangements that have active payments that need reviewed.
12-July-2019	Small amount of cleanup only.