Abstract

This document is a printable version of Latitude help for Administrators.

For copyright and trademark information, see https://help.genesys.com/latitude/10/desktop/Copyright_and_Trademark_Information.htm.
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Introduction to Latitude

Latitude is a powerful debt collection and recovery management system that uses the latest technologies, including Microsoft® SQL Server and Avalon Crystal Reports. Latitude by Genesys developed and maintains the entire suite of Latitude products.

The Latitude suite contains a family of products that operate together to manage the debt collection process. This suite is available in a premises-based or hosted environment. Latitude by Genesys developed the software platform on a stable, secure, Microsoft® SQL Server database using Microsoft® .NET development tools. Latitude’s open-ended architecture allows you to customize the software to meet the needs of individual clients.

What's New in Latitude 10.0

The following Service Updates (SU) introduced changes and enhancements in Latitude 10.0:

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Important!

If you upgrade from a Latitude version earlier than SU 9 to SU 9 or later, there is a one-time configuration task that you need to complete in Custodian. For more information, see "Configure Custodian for SU 9 or Later" in the Custodian documentation.

There is also a utility program that you need to run one time only. For more information, see "Run Latitude.Utilities.DataFix.exe for SU 9 or Later" in the Latitude Installation and Configuration Guide.

SU 1

SU 1 introduced the following changes and enhancements to Latitude 10.0:

- Payment Vendor Gateway
- Permissions
- Vendor Payment Batch Wizard

Payment Vendor Gateway

Added Payment Vendor Gateway functionality for forwarding payment transaction requests to vendors. Payment Vendor Gateway replaces the real-time credit card service and does not require users to have the Internet at their desktop. It uses "tokenization" technology for exchanging secure transaction information for deposits to accounts. To support PCI compliance, the system no longer stores sensitive information in the Latitude database. The system requires a separate plug-in for each vendor that your company uses.
Permissions

- Added **Access Batch Wizard Permission** for specifying whether the Vendor Payment Batch Wizard is available to users.
- Added **ACH Vendor Information Permission** for specifying the vendor to use for processing ACH payments using Payment Vendor Gateway.
- Added **Credit Card Vendor Information Permission** for specifying the vendor to use for processing credit card payments using Payment Vendor Gateway.
- Added **Enable Latitude Payment Vendor Gateway Permission** for specifying whether Payment Vendor Gateway is available for sending financial transactions through the Vendor Payment Batch Wizard.
- Added **Paper Draft Vendor Information Permission** for specifying the vendor to use for processing paper draft payments using Payment Vendor Gateway.

Vendor Payment Batch Wizard

Added Vendor Payment Batch Wizard for selecting and sending batches of credit card, ACH, and paper draft payment transactions to vendors or banks for processing. The Vendor Payment Batch Wizard also processes ACH and paper draft return files received from vendors and banks. This program replaces the PDC Management and Credit Card Management modules in Latitude, and also replaces the PDT tool. For more information about the Vendor Payment Batch Wizard, see the Vendor Payment Batch Wizard documentation.

SU 2

SU 2 introduced the following changes and enhancements to Latitude 10.0:

- **Desk assignment**
- **Fee schedules**
- **First-party charge-offs**
- **Payment arrangements**
- **Permissions**
- **Promise notes**
- **Service Request Gateway**

Payment arrangements

Added the ability to modify a payment due date or amount in the **Enter New Arrangements** window. For more information, see Calculate the Arrangement (Normal Mode) or Calculate the Arrangement (Simple Mode), depending on which mode your system is set up to use.

Desk assignment

Added **My Desk Assignment** option to the **Special** menu for allowing users to reassign an account and its linked accounts to their own desk. This feature is useful when users want to create a payment
arrangement for an account not assigned to their desk currently. For more information, see Reassign an Account to Your Desk.

**Fee schedules**

- Increased the number of allowable fee schedule ranges from 5 to 10 in the Fee Schedules dialog box. For more information, see Add a Fee Schedule Code.
- Added Payment Amount and Batch Balance Placed fee schedule types in the Create New Fee Schedule dialog box. For more information, see Add a Fee Schedule Code.

**First-party charge-offs**

Added ability to have active past due statuses for first-party charge-offs that entered bankruptcy processing before charge-off.

**Permissions**

- Added Access SRG Module Installer Permission for specifying whether users can run the SRG Module Installer.
- Added Access the Credit Report Request Wizard Permission for specifying whether the Credit Report Request Wizard is available to users.
- Added Allow Viewing of Credit Reports Permission for specifying whether users can view credit reports.
- Added Credit Report Requests Settings Permission for configuring general settings for credit report requests.
- Added Enable Latitude Service Request Gateway Permission for specifying whether to use Service Request Gateway for requesting services from vendors.
- Added Enable "One Off" Credit Report Requests Permission for specifying whether users can request credit reports.
- Added Enable Overrides to Credit Report Request Settings Permission for specifying whether users can override settings for credit report requests.
- Added My Desk Assignment Permission for specifying whether users can reassign accounts to their own desk.

**Promise notes**

Added ability to view promise notes on the Payment tab in the Account tab in the Payment Entry window. For more information, see Add a Payment to an Account.

**Service Request Gateway**

Added Service Request Gateway Wizard for requesting services from a service vendor, such as a credit reporting vendor. Service Request Gateway uses Latitude Tokenizer, which provides a secure connection between your organization and the service vendor. The system requires a separate plug-in for each vendor your company uses.
SU 3

SU 3 introduced the following changes and enhancements to Latitude 10.0:

- **Account linking**
- **Payments**
- **Permissions**

**Account linking**

Removed the ability to unlink accounts that are part of an active payment arrangement from the View / Create Links tab in the Link Maintenance window. For more information, see Remove an Account From a Link.

**Payments**

- Added Judgment Date and Case Number to the Payment Entry window for accounts that have these values. For more information, see Add a Payment to an Account.

- Added ability to specify the columns to display in the linked accounts grid in the Payment Entry window and the display order using the Grid: Linked Accounts dialog box. For more information, see Hide or Show Linked Accounts Columns.

- Removed ability to reverse fees with a zero value in the Payment Entry window.

**Permissions**

- Added Send the surcharge as a separate transaction policy to the ACH Vendor Information Permission for specifying whether to send surcharges as separate transactions to ACH vendors.

- Added Send the surcharge as a separate transaction policy to the Credit Card Vendor Information Permission for specifying whether to send surcharges as separate transactions to credit card vendors.

- Added Send the surcharge as a separate transaction policy to the Paper Draft Vendor Information Permission for specifying whether to send surcharges as separate transactions to paper draft vendors.

SU 4

SU 4 introduced the following changes and enhancements to Latitude 10.0:

- **Credit Bureau reporting**
- **Fee schedules**
- **Payment processing**
- **Permissions**

**Credit Bureau reporting**

- Removed ability to report an account to the credit bureaus from the CB Detail panel and the Credit Bureau Reporting - Account Summary window.
• Added **Utility** tab to the **CB Detail** panel for managing miscellaneous credit bureau reporting settings (such as Chapter 128 and bankruptcy withdrawal).

• Removed CBR configuration options from the **Status Code Properties** dialog box. Configuration options are now only in Credit Bureau Reporting Console.

**Fee schedules**

Added **Alloc%** to the **Fee Schedules** window for allocating a collection cost that is some percentage of the amount of the payment, or remaining payment amount in the case that the system allocates other buckets first. For more information, see [Fee Code Schedule - Age Based](#), [Fee Code Schedule - Balance Based](#), or [Fee Code Schedule - Liquidation Based](#).

**Payment processing**

Added ability to adjust payments on a POD account in the **Payment Entry** window. For more information, see Add a Payment to a POD Account.

**Permissions**

• Added **DOB Edit Permission** for specifying whether users can modify a person's date of birth.

• Added **Driver's License Number Edit Permission** for specifying whether users can modify a person's driver's license number.

**SU 5**

SU 5 introduced the following changes and enhancements to Latitude 10.0:

• **Credit Bureau reporting**

• **Permissions**

• **Projected fees**

**Credit Bureau reporting**

Changed message from "Scheduled to report" to "Will evaluate on" on the **CB Detail** panel. For more information, see View Credit Bureau Reporting Account Information.

**Projected fees**

Added ability to modify projected fees for a scheduled credit card or ACH payment arrangement in the **Edit Projected Fees** dialog box.

**Permissions**

Added **Edit Projected Fees Permission** for modifying projected fees on scheduled credit card and ACH payments.

**SU 6**

SU 6 introduced the following changes and enhancements to Latitude 10.0:
• Care and hardship
• Complaints
• Compliance condition codes
• Custom data
• Disputes
• Income and expenditures
• Permissions

Care and hardship
Added Care and Hardship panel for maintaining care and financial hardship cases for accounts. For more information, see Care and Hardship.

Complaints
Added Complaints panel for maintaining complaints for accounts. For more information, see Complaints.

Compliance condition codes
Changed the optional credit bureau reporting of compliance condition code "XB" from one-time reporting to reporting for as long as the code is valid for an account. For more information, see Compliance Condition Codes.

Custom data
Added Custom Data panel for adding and modifying user-defined list codes, and associating data to the list codes. For more information, see Custom Data.

Disputes
Added Disputes panel for maintaining disputes for accounts. For more information, see Disputes.

Income and expenditures
Added Income and Expenditures panel for maintaining income and expenditure information. For more information, see Income and Expenditures.

Permissions
• Added Branches policy to Access Outside Branch Permission for specifying the branches for which users can and cannot view accounts.
• Added Care and Hardships User Policy Permission for specifying whether users can maintain care and hardship cases.
• Added Care Types Permission for specifying whether users can add or modify care types.
• Added Complaint Categories Permission for specifying whether users can add or modify complaint categories.
Added Complaints User Policy Permission for specifying whether users can maintain complaints.

Added Custom List Permission for specifying whether users can add and modify custom data.

Added Dispute Types Permission for specifying whether users can add or modify dispute types.

Added Disputes User Policy Permission for specifying whether users can maintain disputes.

Added Financial Hardships Permission for specifying whether users can add or modify financial hardship types.

SU 7

SU 7 introduced the following changes and enhancements to Latitude 10.0:

- Credit Bureau reporting
- Payment arrangements
- Permissions

Credit Bureau reporting

- Changed CB Detail panel to display information on tabs instead of separate windows. For more information, see View Credit Bureau Reporting Account Information.
- Added ability to reset the credit reporting wait days for new accounts not yet reported using the Summary tab in the CB Detail panel.
- Added ability to undo a credit reporting delete request if you haven't sent the delete request to the credit bureaus using the Summary tab in the CB Detail panel.
- Added ability to prevent an account from reporting to the credit bureaus that reported previously using the Summary tab in the CB Detail panel.
- Added ability to restore credit reporting for an account that you prevented from reporting using the Summary tab in the CB Detail panel.
- Removed ability to modify credit reporting information for a debtor (for example, transaction type, ECOA code).
- Removed ability to modify credit reporting information for an account (for example, account type, creditor class).

Payment arrangements

Added ability to reset modified values to their original values when calculating an arrangement on the Calculate Arrangement page in the Enter New Arrangements window. For more information, see Calculate the Arrangement (Normal Mode) or Calculate the Arrangement (Simple Mode), depending on the mode your organization uses.

Permissions

- Added CBR Delete Button Permission for specifying whether users can delete accounts from credit bureau reporting.
• Added CBR Prevent Flag and Undo Delete Permission for specifying whether users can reinstate credit reporting eligibility for accounts deleted because of an error, fraud, or insurance is paying or paid the debt.

• Added CBR Utility Tab Permission for specifying whether to display or hide the Utility tab on the CB Detail panel.

SU 8

SU 8 introduced the following changes and enhancements to Latitude 10.0:

• Payment arrangements

• Permissions

Payment arrangements

• Added Change Wallet Item dialog box for:
  o Changing the payment instrument on a single payment in an arrangement.
  o Assigning multiple payment instruments to a payment arrangement.
  o Adding a credit card wallet item and assigning it to a single payment or all payments in an arrangement.
  o Adding an ACH wallet item and assigning it to a single payment or all payments in an arrangement.

• Added ability to create an arrangement without specifying a payment instrument in the Enter New Arrangements window. For more information, see Review the Payment Arrangement.

• Added Delete Payment option to the Arrangements panel for deleting a payment from an arrangement without having to delete and recreate the arrangement.

• Added Monthly Pick option to the Payment Mode list box on the Calculate Arrangements page in the Enter New Arrangements window for specifying the week day to use to establish payment due dates. For more information, see Calculate the Arrangement (Normal Mode) or Calculate the Arrangement (Simple Mode), depending on the mode your organization uses.

• Added Make Up Payment option to the Arrangements panel for making up a declined payment when the last payment in the arrangement fails.

• Removed ability to create an arrangement when an existing arrangement is on hold. For more information, see Payment Arrangement Tasks.

• Removed the "Account has a settlement agreement" message from the Arrangements panel when an account has a settlement arrangement that is no longer active. For more information, see View Payment Arrangements.

Permissions

• Added Only Debit Cards Accepted policy to the Add Credit Card Payments Permission for specifying whether your organization accepts debit cards but not credit cards, or whether your organization accepts both.
• Removed **Allow payment due date prior to the current date** policy from the [Add Credit Card Payments Permission](#).

• Changed the limit for the **Maximum Payments** policy in the [Add Credit Card Payments Permission](#) to 250. When upgrading to Latitude 10.0 SU 8, ensure that this value is greater than 0 (zero) or you cannot create a payment arrangement.

• Removed **Allow check deposit prior to the current date** policy from the [Create PDCs Permission](#).

• Changed the limit for the **Maximum Checks** policy in the [Create PDCs Permission](#) to 250. When upgrading to Latitude 10.0 SU 8, ensure that this value is greater than 0 (zero) or you cannot create a payment arrangement.

• Changed the limit for the **Maximum Promises** policy in the [Create Promises Permission](#) to 250. When upgrading to Latitude 10.0 SU 8, ensure that this value is greater than 0 (zero) or you cannot create a payment arrangement.

• Added [Enter Check Information Permission](#) for specifying whether users can provide checking or savings account information when creating a payment arrangement.

• Added [Enter Credit Card Information Permission](#) for specifying whether users can provide credit card information when creating a payment arrangement.

• Added [Make Up Credit Card Decline Permission](#) for specifying whether users can make up a declined credit card payment on an arrangement.

• Added **Maximum Number of Days** policy to the Minimum Settlement Options Permission for specifying the maximum number of days allowed for settling a payment arrangement.

**SU 9**

**Important!**

If you upgrade to SU 9, there is a **one-time** configuration task that you need to complete in Custodian. For more information, see "Configure Custodian for SU 9 or Later" in the Custodian documentation.

There is also a utility program that you need to run **one time only** when upgrading to SU 9. For more information, see "Run Latitude.Utilities.DataFix.exe for SU 9 or Later" in the Latitude Installation and Configuration Guide.

SU 9 introduced the following changes and enhancements to Latitude 10.0:

• [Addresses](#)

• [Interest](#)

• [Letters](#)

• [Payment arrangements](#)

• [Payment Instruments](#)

• [Permissions](#)

• [Queue Levels](#)
• **Status Codes**

• **System codes**

**Addresses**

Added the **Choose Bank Accounts to Sync Address Change** dialog box for syncing bank account addresses when modifying a debtor's or co-debtor's address. This dialog box also appears when modifying an address for an ACH wallet item. For more information, see Modify a Debtor's or Co-debtor's Address and Change the Address for an ACH Wallet Item.

**Interest**

Added the **Interest Accrual Tracking** panel for viewing accrued interest for an account. For more information, see View Interest Accrual.

**Letters**

• Added ability to modify pending letters using Microsoft Word to the **Account Letters** window. For more information, see Modify a Pending Letter Using Microsoft Word.

• Changed the format of saved letter images from RTF to PDF to save space. For more information, see View a Letter Image.

**Payment arrangements**

• Added ability to change the check number for an active ACH payment in an arrangement in the **Change Wallet Item** dialog box. For more information, see Change the Check Number for a Payment.

• Added ability to change the payment instrument for multiple payments in the **Arrangements** panel. For more information, see Change Payment Instrument for Multiple Payments.

• Added ability to select a payment instrument from the wallet on the **Select Payment Type** page in the **Enter New Arrangements** window. For more information, see Select a Payment Type.

• Added ability to view payment arrangements for linked accounts in the **Arrangements** panel. For more information, see View Payment Arrangement for Linked Accounts.

• Added ability to add a payment to an arrangement in the **Payment Arrangement Wizard**. For more information, see Add a Payment to a Payment Arrangement.

• Added ability to renegotiate a payment arrangement in the **Payment Arrangement Wizard**. For more information, see Renegotiate a Payment Arrangement.

• Changed the functionality for making up a declined payment in the **Arrangements** panel so that it doesn't ask whether you want to add or reuse a wallet item. Instead, it uses the existing payment instrument. For more information, see Make Up a Declined Payment.

• Changed the functionality for real-time credit card processing in the **Arrangements** panel to either post transactions immediately or save them in a batch for posting later, depending on permissions. For more information, see Process a Real-time Credit Card Transaction.

• Added an option to the **Select Settlement Arrangement** and the **Calculate Arrangements** pages to allow you to calculate an arrangement on demand. If you have the appropriate permissions,
you can calculate an arrangement on demand. If you don't have the appropriate permissions, Latitude calculates the arrangement as you change values in the arrangement, which decreases performance. For more information, see Auto Calculate Permission, Select a Settlement Arrangement, Calculate the Arrangement (Normal Mode), and Calculate the Arrangement (Simple Mode).

- Removed ability to add the remaining amount due (deficit) as a trailing payment when tweaking an arrangement. Instead, Latitude adjusts the last payment amount accordingly. For more information, see Tweak a Payment Arrangement.

For more information about payment and arrangement changes in this release, see Linked Accounts Payments and Arrangements.

**Payment instruments**

- Changed the process for adding payment instruments to the wallet in the Add Payment Instrument dialog box. For more information, see Add a Credit Card and Add a Checking or Savings Account.
- Added ability to look up a payment instrument in the Look up Payment Instrument dialog box that is available during the current Latitude session only. For more information, see Look up a Payment Instrument.
- Added ability to delete a payment instrument in the Wallet Maintenance dialog box. For more information, see Delete a Payment Instrument.
- Added ability to change the address for a payment instrument in the Payment Instrument Contact dialog box. For more information, see Change the Address for a Payment Instrument.

**Permissions**

- Removed Access Promises permission as Latitude no longer requires it.
- Added "Default_AccountWithAIM" option to the Account View Customer Code Override Policy Permission for displaying AIM details on the Account page in Web Access.
- Added "Post Real Time Credit Card transactions processed from the Arrangements panel" policy to Enable Real Time Credit Card Processing Permission for specifying whether to post credit card transactions to debtor accounts immediately or save them to a batch file for processing later.
- Added Merge Using Microsoft Word Permission for specifying whether users can modify pending letters in Latitude and letter templates in Letter Console using Microsoft Word. You must have Microsoft Word installed to use this feature.
- Added Add Payments Permission for specifying whether users can add payments to non-settlement payment arrangements.
- Added Add Payment Instruments Permission for specifying whether users can add payment instruments to a person's wallet.
- Added Auto Calculate Permission for specifying whether the system calculates arrangements as a user change values or whether the user notifies the system when to calculate the arrangement.
• Added **Delete Payment Instruments Permission** for specifying whether users can delete payment instruments from a person's wallet.

• Added **Edit Payment Instruments Permission** for specifying whether users can modify payment instrument addresses.

• Added **Look up Payment Instruments Permission** for specifying whether users can look up payment instruments that are available during the current Latitude session only.

• Added **Use Payment Instruments Permission** for specifying whether users can select a payment instrument in a person's wallet to use in a payment arrangement.

**Queue levels**

• Added queue level **014 - Incomplete Link Arrangement** for linked arrangements that don't contain all the linked accounts.

• Changed description of queue level **019** from "Bounced Check (NSF), still has PDCs pending" to "Bounced Check (NSF), with PDCs pending."

For more information, see **Standard Queue Levels**.

**Status codes**

Added status code **ILA - Incomplete Link Arrangement** for linked arrangements that don't contain all the linked accounts. For more information, see Standard Status Codes.

**System codes**

Added **Letter Type** dialog box for maintaining user-defined letter types for Letter Console. For more information, see **Letter Type Codes**.

**Log on to Latitude**

Use the **Latitude Login** dialog box to log on to Latitude. The options and features in Latitude that are available to you are based on your assigned permissions. For information about password and account lock out policies, see **Security Permissions and Policies**.

**To log on to Latitude**

1. Click **Start > All Programs > Latitude Software > Latitude**. The **Latitude Login** dialog box appears.

2. In the **User Name** box, type your Latitude user name.
3. In the **Password** box, type your Latitude password. As you type your password, periods display instead of the typed characters.

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

4. Click **Okay**. The **Main Menu** window appears.

---

**Latitude Help Overview**

Latitude help provides you with information for using Latitude. Use the table of contents, index, and search features to locate and view a topic.

**To open Latitude help**

- In menu bar, click the **Help** option. The **Latitude Help** window appears.
**Tip:** To adjust the width and height of the window or its panes, click the edge of the window or pane and drag it up, down, left, or right.

1. **Toolbar:** Allows you to hide or show the tabs and Navigation pane, move forward and backward through topics, and print the currently displayed topic.

2. **Tabs:** Displays the following:
   - **Contents:** Displays the table of contents. To display a topic in the Content pane, expand a book and then click the link.
   - **Index:** Displays the index. To display a topic in the Content pane, type a keyword or phrase in the box (or scroll through the list) and then click the link in the list.
   - **Search:** Displays the search feature. To display a topic in the Content pane, type a keyword or phrase in the box and then press Enter. In the search results, click the link.
   - **Glossary:** Displays a glossary of terms and definitions. To display a definition, click the term.

3. **Breadcrumbs:** Displays your current location within the help system. When you click a breadcrumb, the related topic displays.

4. **Content toolbar:** Displays an option to send feedback through an email message to Latitude by Genesys Documentation.

5. **Content pane:** Displays the contents of a topic. To view the Content pane menu, right-click in the Content pane.
**Search feature**

You can use the search feature to search for topics that contain words or phrases that you specify. You formulate a search query following a specific set of rules. You can include wildcard expressions, Boolean operators, and nested expressions in your search query. A list of topics that match your search criteria appear in the search results. When you click a topic title in the search results, the content of that topic appears in the Content pane.

**Search syntax**

The basic rules for formulating search queries are:

- Searches are not case-sensitive, meaning you can type uppercase or lowercase characters.
- You cannot search for a single character or the following reserved words: an, and, as, at, be, but, by, do, for, from, have, he, in, it, not, of, on, or, she, that, the, there, they, this, to, we, which, with, you.
- The search engine ignores punctuation marks and special characters such as @#$%^&()=+\[\].
- Enclose phrases and terms that include a period (such as a file name with an extension) in double quotation marks.

**Wildcard expressions**

Wildcard expressions allow you to search for one or more characters using a question mark or asterisk. A question mark represents a single character, while an asterisk represents one or more characters.

<table>
<thead>
<tr>
<th>Search for...</th>
<th>Example</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Topics with text that starts with one or more specified characters and ends in any character or number of characters</td>
<td>log or log*</td>
<td>Returns all topics with text that starts with the specified characters (for example, log, logon, logging).</td>
</tr>
<tr>
<td>Topics with text that starts with the specified characters, has a single character that can be anything, and ends in the specified characters</td>
<td>32?57</td>
<td>Returns all topics with text that has any character where you placed the question mark (for example, 32?57 returns 32257, 32457, and 32857).</td>
</tr>
<tr>
<td>Topics that contain all the words specified, in any order or placement within the topic</td>
<td>account status</td>
<td>Returns all topics with both account and status, but not necessarily as a phrase or in the order specified. For example, the search returns topics with &quot;the account status...&quot; or &quot;the status of the account...&quot;</td>
</tr>
<tr>
<td>Topics that contain the specified phrase</td>
<td>&quot;account status&quot;</td>
<td>Returns all topics with account status as a phrase. For example, the search returns topics with &quot;the account status...&quot; but not &quot;the status of the account...&quot;</td>
</tr>
</tbody>
</table>

**Boolean operators**

Boolean operators (AND, OR, NOT, NEAR) allow you to create a relationship between terms. If you don't specify an operator, the system uses AND by default.
## Nested expressions

Nested expressions allow you to perform complex searches. For example, queue AND ((collector OR clerical) not supervisor) finds topics containing queue and collector but not supervisor, or containing queue and clerical but not supervisor. As with mathematical expressions, the system evaluates expressions in parentheses first. If there is no parenthesis, the system evaluates the expression from left to right. For example, queue NOT (clerical OR supervisor) finds topics containing queue but not clerical or supervisor. Queue NOT clerical OR supervisor finds topics containing queue but not clerical, or topics containing supervisor.

## Latitude Overview

The **Main Menu** window presents a menu of options for using Latitude. When you click a menu option, the corresponding window or dialog box appears.

### Table: Search for...

<table>
<thead>
<tr>
<th>Search for...</th>
<th>Example</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>AND</td>
<td>account AND status</td>
<td>Returns all topics with both account and status, but not necessarily as a phrase or in the order specified. For example, the search returns topics with &quot;the account status...&quot; or &quot;the status of the account...&quot;</td>
</tr>
<tr>
<td>OR</td>
<td>account OR status</td>
<td>Returns all topics with either account or status, or both.</td>
</tr>
<tr>
<td>NOT</td>
<td>account NOT status</td>
<td>Returns all topics with account but not status.</td>
</tr>
<tr>
<td>NEAR</td>
<td>account NEAR status</td>
<td>Returns all topics where account is within eight words of status.</td>
</tr>
</tbody>
</table>
Window layout

The following example shows the layout of most Latitude windows.
1. **Menu bar**: Displays available submenus and commands for the window.

2. **Navigation pane**: Displays the navigation for the window. To display information, you click (or in some cases, double-click) an item in the Navigation pane. Double-clicking an item usually displays the information in a separate window or dialog box.

3. **Information pane**: When you click an item in the Navigation pane, the associated information appears in the Information pane. The information is either:
   - A list of records associated to the item selected in the Navigation pane (as in the example). If you double-click a record in the Information pane, the record displays in edit mode in the Information pane.
   - A single record associated to the item selected in the Navigation pane that you can edit in the Information pane.

### Change Your Password

Use the **Change Password** dialog box to change your password.

**To change your password**

1. In the **Main Menu** window, from the **Security** menu, click **Change Password**. The **Change Password** dialog box appears.
2. In the **Old Password** box, type your current password.

3. In the **New Password** box, type your new password.

4. In the **Confirm Password** box, retype your new password.

5. Click **Change**.

### Shortcut Keys

Shortcut keys are available in certain areas of Latitude. To use a shortcut key, hold down the specified key (either **Alt** or **Ctrl**), click the specified letter key, and then release both keys.

In this topic:

- **Main Menu window**
  - Latitude Help system
  - Latitude Invoices window
  - Letter Console window
  - Payment Entry dialog box
- **Work Form**
  - All Debtor Notes dialog box
  - Debtor Contact Analysis dialog box
  - Debtor Details dialog box
  - Link dialog box

### Main Menu window

<table>
<thead>
<tr>
<th>Key Combination</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alt + A</td>
<td>Opens the <strong>Apps</strong> menu. Arrow up or down to select a menu option and then press <strong>Enter</strong>.</td>
</tr>
<tr>
<td>Alt + C</td>
<td>Opens the <strong>Custom</strong> menu. Arrow up or down to select a menu option and then press <strong>Enter</strong>.</td>
</tr>
<tr>
<td>Alt + D</td>
<td>Opens the <strong>Data Entry</strong> menu. Arrow up or down to select a menu option and then press <strong>Enter</strong>.</td>
</tr>
</tbody>
</table>
### Latitude Printable Help for Administrators

<table>
<thead>
<tr>
<th>Key Combination</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alt + F</td>
<td>Opens the <strong>File</strong> menu. Arrow up or down to select a menu option and then press <strong>Enter</strong>.</td>
</tr>
<tr>
<td>Alt + H</td>
<td>Opens the <strong>Help</strong> menu. Arrow up or down to select a menu option and then press <strong>Enter</strong>.</td>
</tr>
<tr>
<td>Alt + M</td>
<td>Opens the <strong>Maintenance</strong> menu. Arrow up or down to select a menu option and then press <strong>Enter</strong>.</td>
</tr>
<tr>
<td>Alt + R</td>
<td>Opens the <strong>Reports</strong> menu. Arrow up or down to select a menu option and then press <strong>Enter</strong>.</td>
</tr>
<tr>
<td>Alt + S</td>
<td>Opens the <strong>Security</strong> menu. To open the <strong>Change Password</strong> dialog box, press <strong>Enter</strong>.</td>
</tr>
<tr>
<td>Alt + T</td>
<td>Opens the <strong>Tools</strong> menu. Arrow up or down to select a menu option and then press <strong>Enter</strong>.</td>
</tr>
<tr>
<td>Alt + W</td>
<td>Opens a blank <strong>Work Form</strong>.</td>
</tr>
</tbody>
</table>

### Latitude Help system

<table>
<thead>
<tr>
<th>Key Combination</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alt + C</td>
<td>Displays the <strong>Contents</strong> tab.</td>
</tr>
<tr>
<td>Alt + N</td>
<td>Displays the <strong>Index</strong> tab.</td>
</tr>
<tr>
<td>Alt + S</td>
<td>Displays the <strong>Search</strong> tab.</td>
</tr>
</tbody>
</table>

### Latitude Invoices window

<table>
<thead>
<tr>
<th>Key Combination</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alt + A</td>
<td>Opens the <strong>Actions</strong> menu. Arrow up or down to select a menu option and then press <strong>Enter</strong>.</td>
</tr>
<tr>
<td>Alt + R</td>
<td>Opens the <strong>Reports</strong> menu. Arrow up or down to select a menu option and then press <strong>Enter</strong>.</td>
</tr>
<tr>
<td>Alt + T</td>
<td>Opens the <strong>Tools</strong> menu. Arrow up or down to select a menu option and then press <strong>Enter</strong>.</td>
</tr>
<tr>
<td>Alt + V</td>
<td>Opens the <strong>View</strong> menu. Arrow up or down to select a menu option and then press <strong>Enter</strong>.</td>
</tr>
</tbody>
</table>
Letter Console window

<table>
<thead>
<tr>
<th>Key Combination</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alt + H</td>
<td>Opens the Help menu. Arrow up or down to select a menu option and then press Enter.</td>
</tr>
</tbody>
</table>

Payment Entry dialog box

<table>
<thead>
<tr>
<th>Key Combination</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alt + N</td>
<td>Opens the New Batch dialog box to allow you to add a batch.</td>
</tr>
<tr>
<td>Alt + O</td>
<td>Opens the Payment Batches dialog box to allow you to edit a batch.</td>
</tr>
<tr>
<td>Alt + R</td>
<td>Opens the Reports menu. Arrow up or down to select a menu option and then press Enter.</td>
</tr>
<tr>
<td>Alt + X</td>
<td>Closes the Payment Entry dialog box.</td>
</tr>
</tbody>
</table>

Work Form

<table>
<thead>
<tr>
<th>Key Combination</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alt + C</td>
<td>Opens the Calls menu. Arrow up or down to select a menu option and then press Enter.</td>
</tr>
<tr>
<td>Alt + D</td>
<td>Displays the Post Dates panel.</td>
</tr>
<tr>
<td>Alt + H</td>
<td>Opens the Help menu. Arrow up or down to select a menu option and then press Enter.</td>
</tr>
<tr>
<td>Alt + I</td>
<td>Opens the Info menu. Arrow up or down to select a menu option and then press Enter.</td>
</tr>
<tr>
<td>Alt + K</td>
<td>Opens the Skip menu. Arrow up or down to select a menu option and then press Enter.</td>
</tr>
<tr>
<td>Alt + L</td>
<td>Opens the Letters menu. To open the Account Letters dialog box, press Enter. To open the Special menu, press Alt + L a second time. Continuing to press Alt + L switches between the Letters and Special menus.</td>
</tr>
<tr>
<td>Alt + N</td>
<td>An account must be open in the Work Form. If the Notes panel is not open, displays the Notes panel. If the Notes panel is open, displays the New Note dialog box. To close the dialog box, press Esc.</td>
</tr>
<tr>
<td>Alt + P</td>
<td>Displays the Arrangements panel.</td>
</tr>
<tr>
<td>Alt + Q</td>
<td>While working a Collector queue, opens the Set Follow Up dialog box. Within this dialog box, the following shortcut keys are available: Alt + T Changes the follow-up date to tomorrow's date.</td>
</tr>
<tr>
<td>Key Combination</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Alt + 2 (3, 4, 5, or 7)</td>
<td>Changes the follow-up date to two (3, 4, 5, or 7) days from the current date.</td>
</tr>
<tr>
<td>Alt + O</td>
<td>Saves your changes and closes the <strong>Set Follow Up</strong> dialog box.</td>
</tr>
<tr>
<td>Alt + C</td>
<td>Discards your changes and closes the <strong>Set Follow Up</strong> dialog box.</td>
</tr>
<tr>
<td>Alt + R</td>
<td>Opens the <strong>Restrictions</strong> menu. Arrow up or down to select a menu option and then press <strong>Enter</strong>.</td>
</tr>
<tr>
<td>Alt + S</td>
<td>Opens the <strong>Search</strong> menu. Arrow up or down to select a menu option and then press <strong>Enter</strong>.</td>
</tr>
<tr>
<td>Alt + Y</td>
<td>Opens the <strong>Payments</strong> menu. Arrow up or down to select a menu option and then press <strong>Enter</strong>.</td>
</tr>
<tr>
<td>Ctrl + F</td>
<td>Opens the <strong>Latitude Search - Search for Account</strong> dialog box. Within this dialog box, the following shortcut keys are available:</td>
</tr>
<tr>
<td>Alt + S</td>
<td>Performs a search based on the specified criteria.</td>
</tr>
<tr>
<td>Alt + B</td>
<td>From the <strong>Search Results</strong> tab, returns you to the <strong>Simple Search</strong> or <strong>Advanced Search</strong> tab.</td>
</tr>
<tr>
<td>Alt + C</td>
<td>Displays the <strong>Latitude Search</strong> dialog box to allow you to clear the search criteria. To clear the search criteria, press <strong>Alt + Y</strong>. To close the dialog box without clearing the search criteria, press <strong>Alt + N</strong>.</td>
</tr>
<tr>
<td>Esc</td>
<td>Closes the <strong>Latitude Search</strong> dialog box.</td>
</tr>
</tbody>
</table>

### All Debtor Notes dialog box

<table>
<thead>
<tr>
<th>Key Combination</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alt + E</td>
<td>Closes the <strong>All Debtor Notes</strong> dialog box.</td>
</tr>
<tr>
<td>Alt + N</td>
<td>Opens the <strong>Latitude - New Note</strong> dialog box.</td>
</tr>
<tr>
<td>ESC</td>
<td>Closes the <strong>All Debtor Notes</strong> dialog box.</td>
</tr>
</tbody>
</table>

### Debtor Contact Analysis

<table>
<thead>
<tr>
<th>Key Combination</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alt + E</td>
<td>Closes the <strong>All Debtor Notes</strong> dialog box.</td>
</tr>
<tr>
<td>ESC</td>
<td>Closes the <strong>All Debtor Notes</strong> dialog box.</td>
</tr>
</tbody>
</table>

### Debtor Details dialog box

<table>
<thead>
<tr>
<th>Key Combination</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alt + A</td>
<td>Displays the <strong>Attorney</strong> tab.</td>
</tr>
</tbody>
</table>
Displays the **Bankruptcy** tab. Within this tab, the following shortcut keys are available:

<table>
<thead>
<tr>
<th>Key Combination</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alt + C</td>
<td>Displays the <strong>Court</strong> tab.</td>
</tr>
<tr>
<td>Alt + G</td>
<td>Displays the <strong>General</strong> tab.</td>
</tr>
<tr>
<td>Alt + O</td>
<td>Displays the <strong>Comments</strong> tab.</td>
</tr>
<tr>
<td>Alt + T</td>
<td>Displays the <strong>Trustee</strong> tab.</td>
</tr>
</tbody>
</table>

Alt + C Closes the dialog box without saving your changes.

Alt + D Displays the **Debtor Info** tab.

Alt + O Saves your changes and closes the dialog box.

Alt + R Displays the **Restrictions** tab.

Alt + S Displays the **Spouse Info** tab.

Alt + V Saves your changes and keeps the dialog box open.

### Link dialog box

<table>
<thead>
<tr>
<th>Key Combination</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alt + C</td>
<td>Closes the Link dialog box.</td>
</tr>
<tr>
<td>Alt + G</td>
<td>Displays the currently selected account in the Work Form.</td>
</tr>
<tr>
<td>Alt + N</td>
<td>Opens the Latitude - New Note dialog box.</td>
</tr>
</tbody>
</table>

### Supplemental Programs

There are several optional Latitude-related programs available, depending on what your organization purchased and installed, and what you have permissions to use. Some of these programs are accessible within Latitude and others are accessible from Windows only.

<table>
<thead>
<tr>
<th>Program</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACH NSF</td>
<td>Processes insufficient fund ACH payment information received from Regal Technologies.</td>
</tr>
<tr>
<td>AIM</td>
<td>The Agency Interface Module (AIM) electronically distributes accounts to other agencies. AIM creates a file that you can import into other software programs for collection activity. In addition, AIM can import information received from an outside agency working accounts into the Latitude database and process account recalls. For more information, contact your Latitude sales representative.</td>
</tr>
<tr>
<td>Auto Mail Return</td>
<td>Uses a pen scanner to read the barcode on returned mail and flag the account as having a bad address.</td>
</tr>
<tr>
<td>Credit Bureau Reporting</td>
<td>Reports to Equifax, Experian, TransUnion, or Innovis the debtor accounts that your agency holds.</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Credit Report retrieval with SmartALX</td>
<td>Downloads credit reports from Equifax, TransUnion, or Experian based on credit report requests that you created in Latitude. Once you download the credit reports, you can attach them to debtor accounts and view them in the Work Form.</td>
</tr>
<tr>
<td>Collection Charge</td>
<td>Adds an agency fee percentage to new business after you load new business into Latitude using any import method.</td>
</tr>
</tbody>
</table>
| Custodian Editor                    | Processes "end of day" activities, including:  
|                                     | • Cleaning data fields of invalid information  
|                                     | • Building daily work queues  
|                                     | • Scheduling promise reminder letters  
|                                     | • Scheduling post-dated check and NITD reminder letters  
|                                     | • Evaluating kept and broken promises  
|                                     | • Scheduling fulfilled and pending post-dated payments  
|                                     | • Calculating simple interest  
|                                     | • Creating vendor letter files  
|                                     | • Evaluating debtor credit bureau reporting status  
|                                     | Because of the complex nature of this program, Latitude by Genesys Support performs Custodian tasks. If you need custom modifications to Custodian tasks, contact Latitude by Genesys Support. |
| Dialer                              | Latitude supports several dialers for campaign building. When collectors are logged on to the dialer, the currently dialed debtor account displays in the Work Form.                                             |
| Direct Check                        | Prints online checks (or paper drafts) created in Latitude. Once printed, you can import the information back into the system for invoicing and other tasks.                                                       |
| Exchange Manager                    | Exchange is a dynamic interface program that allows your organization to create customized import and export files. This program is part of the standard Latitude package; however, you install it separately on each workstation. |
| Latitude Fusion (see also Services Modules) | Latitude Fusion integrates with the Latitude database to create request files and process returned information from various outside service providers.                                                        |
| Latitude Web Access                 | Allows agency customers to view accounts and collection activity. Customers can run reports online and download directly to their workstation. For more information, contact your Latitude by Genesys Sales Representative. |
| Letter Console                      | Generates letters for accounts based on requests made in Latitude. You can create and modify custom letters to merge with account data for any classification of debtor. You can send letters to a third-party letter service for printing, along with data files containing the account information you specify. |
| Manager Dashboard                   | Displays real-time statistical collection information. It allows managers to monitor collection activities for all locations, departments, and teams.                                                            |
Portfolio Manager

Imports accounts and tracks expenses for purchased portfolios, exports accounts, and tracks sales. For more information, contact your Latitude by Genesys Sales Representative.

Services Modules/Fusion

Exports information requests and imports returned files from various outside service providers. Once you import account information, you can click Services on the Work Form to view it.

TUNA

The TransUnion Net Access program allows your agency to process credit bureau report requests, and import and attach credit reports returned to accounts.

Add-in Programs

<table>
<thead>
<tr>
<th>Program</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit Bureau Reporting Console</td>
<td>Creates and maintains configuration settings used when reporting accounts to credit bureaus.</td>
</tr>
<tr>
<td>Latitude Archive</td>
<td>Moves older, unneeded data out of the Latitude database into an archive database, which can free resources and optimize performance.</td>
</tr>
<tr>
<td>Link Console</td>
<td>Handles automatic linking of new accounts entered into the system based on scores and algorithms.</td>
</tr>
<tr>
<td>Reporting Console</td>
<td>Saves snapshots of reports along with comments you type. Snapshots depict a report at a particular point in time.</td>
</tr>
<tr>
<td>User Manager</td>
<td>Manages user accounts.</td>
</tr>
</tbody>
</table>

Applications

<table>
<thead>
<tr>
<th>Program</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto Return</td>
<td>Uses a pen scanner to read the barcode on returned mail and flag the account as having a bad address.</td>
</tr>
<tr>
<td>Goals Manager</td>
<td>Displays statistics for collectors, supervisors, managers, and owners.</td>
</tr>
<tr>
<td>Import Excel</td>
<td>Imports new business data from a Microsoft Excel® spreadsheet into the Latitude database.</td>
</tr>
<tr>
<td>Invoices</td>
<td>Generates invoices for customer remittance, issues statements showing receivables, sets up banks (trust accounts) and creates the checks needed for your customers, based on account collection activity in Latitude.</td>
</tr>
<tr>
<td>Letter Console</td>
<td>Generates letters for accounts based on requests made in Latitude. You can create and modify custom letters to merge with account data for any classification of debtor. You can send letters to a third-party letter service for printing, along with data files containing the account information you specify.</td>
</tr>
<tr>
<td>Manager Dashboard</td>
<td>Displays real-time statistical collection information. It allows managers to monitor collection activities for all locations, departments, and teams.</td>
</tr>
<tr>
<td>Overpayment Manager</td>
<td>Allows your organization to review and manage debtor overpayments, apply them to other accounts, and create refund checks.</td>
</tr>
</tbody>
</table>
Statistics Console | Provides analysis information for customer account activity.

**Dialer Support**

<table>
<thead>
<tr>
<th>Program</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>List Builder</td>
<td>Creates dialer call lists from List Builder query results.</td>
</tr>
<tr>
<td>Legacy Dialer Agent</td>
<td>Connects the standard Latitude Work Form to a supported dialer and its functionality.</td>
</tr>
</tbody>
</table>

**Management Suite**

<table>
<thead>
<tr>
<th>Program</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Analysis</td>
<td>Retrieves accounts that meet specific criteria and then sorts, groups, or summarizes the information for review. Builds a “virtual queue” for working account groups on the fly.</td>
</tr>
<tr>
<td>Credit Report Requester</td>
<td>Requests credit bureau reports for multiple accounts, based on customized selection criteria.</td>
</tr>
<tr>
<td>Credit Reporting Wizard</td>
<td>Creates files to send to credit bureaus.</td>
</tr>
<tr>
<td>Custom Queue Manager</td>
<td>Creates custom queues using customized selection criteria.</td>
</tr>
<tr>
<td>Desk Mover</td>
<td>Moves accounts to specified desks based on customized selection criteria.</td>
</tr>
<tr>
<td>Letter Requester</td>
<td>Requests letters for multiple accounts based on customized selection criteria.</td>
</tr>
<tr>
<td>Payment Batch Wizard</td>
<td>Creates payment batches for processing received payments.</td>
</tr>
<tr>
<td>Pool Queue Manager</td>
<td>Creates “virtual work pools” for collectors based on customized selection criteria.</td>
</tr>
<tr>
<td>Query Configure</td>
<td>Modifies selection criteria for query tools.</td>
</tr>
<tr>
<td>SQL Author</td>
<td>Creates and stores custom SQL statements using the query builder.</td>
</tr>
<tr>
<td>Service Request Gateway Configuration</td>
<td>Configures Latitude so it can connect to service vendors when requesting information.</td>
</tr>
<tr>
<td>Status Changer</td>
<td>Changes the status for groups of accounts based on customized selection criteria.</td>
</tr>
</tbody>
</table>

**Configuration**

**Configuration**

Configuration allows you to set up users and roles, permissions and policies, and system codes for your organization.
Users and Roles

Users and Roles

Use the Users - Roles window to add and modify system users and roles. You control access to Latitude by setting up roles and user accounts, and assigning the roles to user accounts. Roles determine what actions users can perform in Latitude.

You can modify permissions and policies for a user account after you assign a role to that user account. If you change the permission or policy settings for a role, the change reflects in the user accounts associated to that role, unless the user account has a custom setting for that policy or permission.

1. **Menu bar**: Displays submenus and commands for managing users and roles.

2. **Navigation pane**: Displays the roles and users in the system.

3. **Information pane**: Displays information for the role or user selected in the Navigation pane.
Roles

Use the Users - Roles window to add and modify roles. Roles determine what actions users can perform in Latitude. For information about maintaining permissions and policies for a role, see Permissions and Policies.

Add a Role

Use the Users - Roles window to add a role.

To add a role

1. In the Main Menu window, from the Maintenance menu, click Users and Roles. The Users and Roles window appears.
2. From the Action menu, click New Role. The system adds "New Role" to the Roles folder.
3. Type the name of the new role and press Enter. The system saves the new role. The next steps are to assign permissions and policies to the role, and assign the role to one or more users.
4. To assign permissions and policies to the role, see Permissions and Policies.
5. To assign the role to a user, see Modify a User.
Copy a Role
Use the **Users - Roles** window to copy a role to create a role, and then modify its settings as needed.

**To copy a role**

1. In the **Main Menu** window, from the **Maintenance** menu, click **Users and Roles**. The **Users and Roles** window appears.
2. In the **Navigation** pane, in the **Roles** folder, click the role to copy.
3. From the **Action** menu, click **Copy Role**. The system adds a copy of the selected role to the **Roles** folder.
4. Type the name of the copied role and press **Enter**. The system saves the copied role. The next steps are to modify the permissions and policies assigned to the role and add the role to or remove the role from one or more users.
5. To modify the permissions and policies assigned to the role, see Permissions and Policies.
6. To modify role assignments, see Modify a User.

Delete a Role
Use the **Users - Roles** window to delete a role.

**To delete a role**
1. In the Main Menu window, from the Maintenance menu, click Users and Roles. The Users and Roles window appears.

2. In the Navigation pane, in the Roles folder, click the role to delete.

3. From the Action menu, click Delete Role or press Delete. A confirmation dialog box appears.

4. Click Yes. The system removes the role from the Roles folder.

View Users Assigned to a Role

Use the Users - Roles window to view users assigned to a role.

To view users assigned to a role

1. In the Main Menu window, from the Maintenance menu, click Users and Roles. The Users and Roles window appears.

2. In the Navigation pane, in the Roles folder, click a role. The users assigned to the role appear in the Information pane.

Users

Use the Users - Roles window to search for, add and modify system users. You can also unlock user accounts, activate or deactivate user accounts, and reset user passwords.
Search for a User

Use the Latitude Search - Search for a User dialog box to search for a user. You can search on one or more criteria and, in some cases, you can search for single or multiple characters. The more information you provide, the more narrow your results and the less information you provide, the broader your results.

To search for a user

1. In the Main Menu window, from the Maintenance menu, click Users and Roles. The Users and Roles window appears.
2. From the View menu, click Find User. The Latitude Search - Search for a User dialog box appears.
3. To search by Login Name, User Name, Alias, or any combination of the three, type one or more characters in the corresponding box to perform a partial or full search.
4. To search by role, desk, branch, or any combination of the three, click the Search icon next to the corresponding box to open another dialog box. Select the item to search for and click Open. The selected item appears in the corresponding box in the Latitude Search - Search for a User dialog box.

Notes:
- To clear your search criteria to start a new search, click Clear.
- To change the maximum number of records returned, click the up and down arrows next to the Maximum results box.
- For more information about wildcard searches, click the click here link.
5. After you provide one or more search criteria, click Search. The search results appear on the Search Results tab.
6. On the Search Results tab, click a user and then click Select. The Latitude Search - Search for a User dialog box closes and the selected user's information appears in the Information pane of the Users - Roles window.

Add a User

Use the Users - Roles window to add a user.

To add a user

1. In the Main Menu window, from the Maintenance menu, click Users and Roles. The Users and Roles window appears.

2. From the Action menu, click New User. A blank user record appears in the Information pane. Complete the information requested.
User Name: Type the user's first and last name.

Login Name: Type the user's logon name.

Password: The user's password appears here after you set it using the Reset Password button.

Note: Latitude uses the 512-bit Secure Hash Algorithm (SHA-512) with a randomly generated 512-bit salt that is unique per-user, per-password. Latitude stores the combined hash and salt in the user's account as a 128-character hexadecimal string.

Windows ID: The user's Windows authentication ID. If you specify a Windows ID, the user can select the Log in using Windows authentication box in the Latitude Login dialog box when logging on to Latitude.

Dialer User ID: Type the user ID to send to your agency's dialer interface. Some dialer vendor interfaces don't require a user ID.

Dialer Password: Type the user password to send to your agency's dialer interface. Some dialer vendor interfaces don't require a password.

Alias: Type the name the user goes by when making calls (desk name).

Branch: The branch assigned to the user.

Email: Type the user's email address (for example, jdoe@mycompany.com).

Phone: Type the user's telephone number

Extension: Type the user's telephone extension number.
Latitude Printable Help for Administrators

**Desk:** Desk assigned to the user.

**Role:** Role assigned to the user.

**View Permissions for Role:** Click to open the Permissions and Policies Editor window to view the permissions assigned to the selected role.

**View Permissions for User:** Click to open the Permissions and Policies Editor window to view the permissions assigned to the user.

**Show on Time Clock Report:** To include the user's logon and logout time on the User Logon report (formerly the Time Clock report), select this box.

**Save Changes:** Click to save the new user.

**Disable User:** Click to make the user's account inactive so the user cannot log on. This button is not available when adding a user.

**Create New:** Click to create another user. A blank record appears.

**Unlock User:** Click to unlock the user's account. This button is not available when adding a user.

3. To use Windows authentication for logging on, do the following:

a. Next to the **Windows ID** box, click the **Search** icon. The **Select Windows User** dialog box appears.

![Select Windows User Dialog Box](image)

b. Click the user's name and then click **Open**. The Windows ID appears in the **Windows ID** box.

4. To assign a branch to the user, do the following:

a. Next to the **Branch** box, click the **Search** icon. The **Select Branch** dialog box appears.
b. Click the branch and then click **Open**. The branch appears in the **Branch** box.

5. To assign a desk to the user, do the following:
   a. Next to the **Desk** box, click the **Search** icon. The **Select Desk** dialog box appears.

   b. Click the desk and then click **Open**. The desk appears in the **Desk** box.

6. To assign a role to the user, do the following:
   a. Next to the **Role** box, click the **Search** icon. The **Select Role** dialog box appears.
b. Click the role and then click **Open**. The role appears in the **Role** box.

7. Complete the remaining information and then click **Save Changes**.

**Modify a User**

Use the **Users - Roles** window to modify a user.

**To modify a user**

1. In the **Main Menu** window, from the **Maintenance** menu, click **Users and Roles**. The **Users and Roles** window appears.

2. In the **Navigation** pane, in the **Users** folder, click the user to modify. The user record appears in the **Information** pane.

3. Modify the information as necessary. For information about the boxes in this window, see **Add a User**.

4. When finished modifying the information, click **Save Changes**.

**Unlock a User Account**

Use the **Users - Roles** window to unlock a user account.

**To unlock a user account**

1. In the **Main Menu** window, from the **Maintenance** menu, click **Users and Roles**. The **Users and Roles** window appears.

2. In the **Navigation pane**, in the **Users** folder, click the user account to unlock. The user record appears in the **Information** pane.

3. Click **Unlock User** and click **Save Changes**. The user’s account is unlocked, allowing the user to log on.
Activate or Deactivate a User Account

Use the Users - Roles window to activate or deactivate a user account.

To activate or deactivate a user account

1. In the Main Menu window, from the Maintenance menu, click Users and Roles. The Users and Roles window appears.
2. In the Navigation pane, in the Users folder, click the user account. The user record appears in the Information pane.
3. To activate the user account, click Enable User and then click Save Changes. The user appears in the Users folder.
4. To deactivate the user account, click Disable User and then click Save Changes. The system removes the user from the Users folder.

View or Hide Inactive Users

Use the Users - Roles window to view or hide inactive users.

To view or hide inactive users

1. In the Main Menu window, from the Maintenance menu, click Users and Roles. The Users and Roles window appears.
2. To view inactive users, in the View menu, click Show Inactive Users. The inactive users appear in the Users folder with a red X.
3. To hide inactive users, in the View menu, click Hide Inactive Users. The system removes the inactive users from the Users folder.

Reset a User Password

Use the Set Password dialog box to reset a user's password.

To reset a user password

1. In the Main Menu window, from the Maintenance menu, click Users and Roles. The Users and Roles window appears.
2. In the Navigation pane, double-click the user.
3. In the Information pane, next to the Password box, click Reset Password. The Set Password dialog box appears.
4. In the **New Password** box, type the user’s new password.

5. In the **Verify Password** box, retype the new password and then click **OK**.

*Note:* Latitude uses the 512-bit Secure Hash Algorithm (SHA-512) with a randomly generated 512-bit salt that is unique per-user, per-password. Latitude stores the combined hash and salt in the user’s account as a 128-character hexadecimal string. When you reset the password, the password is hashed using a new, random salt.

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**Account Documentation**

**Account Documentation**

Use the **Documentation** panel to attach electronic documents to an account, and scan paper documents to an electronic format and attach them to an account. You can also view, download, print, and email documents associated to an account. To view the panel, your administrator must have selected the panel in the [Work Form Panels permission](#).

**View Documents Associated to an Account**

Use the **Documentation** panel to view documents associated to an account.

To **view documents associated to an account**

1. With an account displayed in the **Work Form**, do one of the following:
   - Click the **View Scanned Images or Documents** icon.
   - From the **Info** menu, click **Documentation**.
   - At the top of the **Panels** section, click the name of the currently displayed panel (for example, **Phones**, **Notes**) and then click **Documentation**.

   The **Documentation** panel appears.

   *Note:* To sort the list of documents, click a column heading.

2. If the document is an image file type (such as jpeg or gif) and you want to view a thumbnail image of it, in the data grid, click the document. The image appears in a box in the **Documentation** panel.

3. In the data grid, click the document and in the **Documentation** toolbar, click **View**. The document opens in the program in which it was created (for example, **Word**, **Excel**, **Adobe Acrobat Reader**).

**Download a Document**

Use the **Documentation** panel to download a document that’s associated to an account.

To **download a document**

1. With an account displayed in the **Work Form**, do one of the following:
   - Click the **View Scanned Images or Documents** icon.
   - From the **Info** menu, click **Documentation**.
• At the top of the Panels section, click the name of the currently displayed panel (for example, Phones, Notes) and then click Documentation.

The Documentation panel appears.

| Note: To sort the list of documents, click a column heading. |

2. In the data grid, click the document and in the Documentation toolbar, click Save. The Save Documentation to File dialog box appears.

3. Browse to the location where you want to save the file and then click Save.

Print a Document

Use the Documentation panel to print a document that's associated to an account.

To print a document

1. With an account displayed in the Work Form, do one of the following:
   • Click the View Scanned Images or Documents icon.
   • From the Info menu, click Documentation.
   • At the top of the Panels section, click the name of the currently displayed panel (for example, Phones, Notes) and then click Documentation.

   The Documentation panel appears.

| Note: To sort the list of documents, click a column heading. |

2. In the data grid, click the document and in the Documentation toolbar, click Print. The document is output to your default printer.

Email a Document

Use the Documentation panel to email a document that's associated to an account.

To email a document

1. With an account displayed in the Work Form, do one of the following:
   • Click the View Scanned Images or Documents icon.
   • From the Info menu, click Documentation.
   • At the top of the Panels section, click the name of the currently displayed panel (for example, Phones, Notes) and then click Documentation.

   The Documentation panel appears.

| Note: To sort the list of documents, click a column heading. |

2. In the data grid, click the document and in the Documentation toolbar, click Email. The document appears as an attachment in a new email message.

3. Provide an email address and then send the email.
Attach a Document to an Account

Use the Documentation panel to attach an electronic document to an account. The document can be any type, such as a Word document, Excel file, text file, or image. If the document is in paper format, see Scan a Document to an Account.

To attach a document to an account

1. With an account displayed in the Work Form, do one of the following:
   - Click the View Scanned Images or Documents icon.
   - From the Info menu, click Documentation.
   - At the top of the Panels section, click the name of the currently displayed panel (for example, Phones, Notes) and then click Documentation.

   The Documentation panel appears.

2. Do one of the following:
   - In the Documentation toolbar, click Attach. The Attach Documentation dialog box appears. Locate the file to attach, click it, and then click Open.
   - Drag and drop a file onto the Documentation panel.

   Tip: You can select multiple files at once. To select multiple sequential files, hold down the Shift key and click the first and last file to attach. To select multiple non-sequential files, hold down the Ctrl key and click each file to attach.

   The Attach Documentation dialog box appears.

   ![Attach Documentation dialog box]

   Note: The file size indicates the storage space required for a document. Your organization is responsible for establishing attachment policies and allocating server space for attached files.

3. In the Category list box, click an existing category to associate to the document or leave it blank.
4. The document name defaults to the file name. To change the document name, in the Name box, type a new name.

5. If the file is an image file type (such as jpeg, gif, or tiff) and you want to view a thumbnail image of the file, click the file name. The image appears in the box.

6. Click OK.

7. If you added a category, a confirmation dialog box appears. Click Yes. The category isn't visible unless the View Attached Documents permission is set in the Policies Editor.

Scan a Document to an Account

Use the Documentation panel to scan a paper document and attach it to an account. If the document is in electronic format, see Attach a Document to an Account.

To scan a document to an account

1. With an account displayed in the Work Form, do one of the following:
   - Click the View Scanned Images or Documents icon.
   - From the Info menu, click Documentation.
   - At the top of the Panels section, click the name of the currently displayed panel (for example, Phones, Notes) and then click Documentation.

   The Documentation panel appears.

2. In the Documentation toolbar, click Scan. The Scan Documentation dialog box appears.

   ![Scan Documentation dialog box](image)

3. In the Category list box, you can leave it blank, click an existing category to associate to the document, or type a new category.

4. In the Name box, type a name to assign to the document.

5. To change the scan resolution, in the Resolution box, type a value or use the arrows to increase or decrease the value.

6. To change the scan quality, in the Quality list box, click a value.

7. If the document has two sides and you want to scan both sides, select the Scan both sides of the document check box.
8. Click Scan. The document is scanned to an image file and displayed in the Scan Documentation dialog box.

9. Click Attach. The scanned document is attached to the account.

**Remove a Document From an Account**

Use the **Documentation** panel to remove a document from an account.

**To remove a document from an account**

1. With an account displayed in the **Work Form**, do one of the following:
   - Click the **View Scanned Images or Documents** icon.
   - From the **Info** menu, click **Documentation**.
   - At the top of the **Panels** section, click the name of the currently displayed panel (for example, **Phones**, **Notes**) and then click **Documentation**.

   The **Documentation** panel appears.

   | Note: To sort the list of documents, click a column heading. |

2. In the data grid, click the document and in the **Documentation** toolbar, click **Detach**. A confirmation dialog box appears.

3. Click **Yes**.

**Permissions and Policies**

**Permissions and Policies**

Permissions grant users the authority to use program features and policies define the limitations of permissions. For example, you can set a permission to allow a user to add a post-dated check (PDC) transaction for an Automated Clearing House (ACH) payment. You can then set a policy indicating that the user cannot add transactions that are less than $20.

It's possible for the system to apply permissions and policies differently, based on the user or other criteria. The system uses a tier (scope) method to create permission and policy layers. So, permissions and policies applied at the base (system) level apply to other scopes, unless an administrator modifies the particular permission or policy. For example, a system level permission applies to all roles, unless an administrator customizes it for the role. Likewise, permissions applied at the role level apply to all users assigned to the role, unless an administrator customizes the permission for an individual user.

**Scopes**

There are 10 scopes in the permission/policy structure, broken into four categories (system, user, desk, and customer). These scopes create a hierarchical tree that extends back to the system level. Following is a diagram that shows each scope within its hierarchical structure.
Scopes available for each permission vary. The system determines which permissions to use by following hierarchy lines. For example, if a permission doesn't apply at the user scope, the system checks the role scope. If it doesn't apply at the role scope, the system checks the system scope. It's also possible to check permissions for both a specific user and a specific client. For example, if the user can add post-dated checks, but the client on the account does not permit post-dated checks, the user cannot add post-dated checks for that client.

The system checks branch permissions based on the user's assigned branch, along with the branch permissions for the user's assigned desk. The system merges these permissions and their settings when all of the following occurs:

- An administrator assigns the user to a desk and a branch not associated to that desk.
- An administrator configures the same permission for the user's branch and the desk's branch.

Policies take the permissions one step further. For example, the user-level and client-level permissions allow post-dated checks. At the user level, the permission stipulates that the minimum check amount is $5.00 and the maximum number of days that a user can post-date a check is 30. The permission understands that with the minimum amount a higher number is more restrictive, while with the maximum number of days the lower amount is more restrictive. The system considers this logic when creating the intersection for the effective permission. The user can add a post-dated check that is at least $15.00 and within 30 days (unless the administrator doesn’t configure the user to observe client rules).

These scenarios can become complicated. To determine the exact policy for the user and customer combination, run the Resultant Set of Policies Wizard.

Permission categories

The system groups permissions into categories. Some permissions have policies associated to them. For more information about a permission and its policies, see the permission topic.
Permissions and Policies Editor

Use the Latitude Permissions and Policies Editor window to set the permissions and policies for each scope. For more information about permissions, policies, and scopes, see Permissions and Policies.

To open the Latitude Permissions and Policies Editor window

1. In the Main Menu window, from the Maintenance menu, click Users and Roles. The Users - Roles window appears.
2. From the Action menu, click Open Policies Editor. The Latitude Permissions and Policies Editor window appears.

1. **Options bar**: Displays the permission options.
2. **Search box**: Allows you to type full or partial text to search for a permission.
3. **Navigation pane**: Displays the permission categories and their associated permissions.
4. **Information pane**: Displays information for the permission selected in the Navigation pane.
5. **Search Results tab**: If you performed a search, click this tab to view the results.

Permission icons
Each permission has an icon that indicates the status of that permission. The icon appears next to the permission in the Navigation pane. The status can vary depending on the scope you have selected.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Icon]</td>
<td>Permission isn't configured.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Permission applies to this scope and is available.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Permission applies at a higher scope and is available.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Permission not applied to this scope and unavailable.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Permission disabled at a higher scope and unavailable.</td>
</tr>
</tbody>
</table>

**Search for a Permission**

Use the **Latitude Permissions and Policies Editor** window to search for a permission and view its detail and any associated policies.

**To search for a permission**

1. In the **Main Menu** window, from the **Maintenance** menu, click **Users and Roles**. The **Users - Roles** window appears.
2. From the **Action** menu, click **Open Policies Editor**. The **Latitude Permissions and Policies Editor** window appears.
3. In the upper section of the **Navigation** pane, in the **Search** box, type the full or partial name of the permission and press **Enter**. Records that match your search criteria appear in the **Search Results** pane.
4. Click a permission in the **Search Results** pane to view its detail information.
Set a Permission and Policy

Latitude Permissions and Policies Editor window to set permissions and policies by scope. For more information about scopes and individual permissions and policies, see Permissions and Policies Overview.

To set a permission and policy

1. In the Main Menu window, from the Maintenance menu, click Users and Roles. The Users - Roles window appears.
2. From the Action menu, click Open Policies Editor. The Latitude Permissions and Policies Editor window appears.
3. In the Options bar, in the Scope list box, click the scope.
4. In the Navigation pane, expand the folder and then click the permission.

   **Note:** If a permission is gray, it is not available for the selected scope.

5. In the Information pane, specify the configuration.

   **Applies to:** Scopes to which the permission applies currently. If a scope has a link, it indicates that an administrator enabled the permission at that level. You can click the link to switch to that scope.

   **Not Configured:** Permission isn't configured.
Enabled: Permission applies to the scope and is available to users.

Disabled: Permission doesn’t apply to the scope and is unavailable to users.

Description: Description of the permission.

6. If there is a policy associated to the permission (as in the previous example), configure the policy.

Note: Policies adhere to the strictest setting when combined. For example, you can set the PDC minimum amount higher for a role scope, and set it lower for a customer scope. The system follows the most restrictive setting, which is the lower amount set at the customer level.

7. In the Options bar, click Save Changes.

8. To determine what permissions and policies apply based on your configuration, see View the Effect of Permissions and Policies.

View the Effect of Permissions and Policies

Use the Resultant Set of Policies Wizard to view the cumulative effect of permissions and policies set for all scopes as applied to a user, customer, or both.

To view the effect of permissions and policies

1. To open the Resultant Set of Policies Wizard, do one of the following:
   - In the Main Menu window, from the Maintenance menu, click Users and Roles, and then from the Action menu, click Resultant Set of Policies Wizard.
   - In the Main Menu window, from the Maintenance menu, click Users and Roles, and then from the Action menu, click Open Policies Editor. In the Options bar, click Resultant Set of Policies.

The Resultant Set of Policies Wizard appears.
2. Click **Next**. The **Select Policies Context** dialog box appears.

3. To evaluate a user account, do the following:
   a. Next to the **User** box, click the **Search** icon. The **Select User** dialog box appears.
b. Click the user name and then click **Open**. The system populates the **User** box in the **Select Policies Context** dialog box with the selected user.

4. To evaluate a customer account, do the following:

   a. Next to the **Customer** box, click the **Search** icon. The **Latitude Search - Search for Customer** dialog box appears.

   b. Type one or more criteria and then click **Search**. All records that match your search criteria appear on the **Search Results** tab.
c. Click the user name and then click Select. The system populates the Customer box in the Select Policies Context dialog box with the selected user.

**Note:** If you choose a user and customer, the permissions and policies shown apply when the user is working accounts for the customer selected.

5. In the Select Policies Context dialog box, click Next. The Completing the Wizard dialog box appears.

6. Click Finish. The Resultant Set of Policies Report window appears. This window shows permissions and their associated policies and which scope the permission and policy applies to.

7. In the Navigation pane, expand a folder and click a permission. The permissions and policies appear in the Information pane. The scope displayed in the lower section of the Information pane indicates which rule applies and to what item. In the following example, in the Navigation
pane, the icon indicates an allowed permission. In the **Information** pane, the selected check box indicates that the user can select a future due date when pre-posting payments. In the lower section of the **Information** pane, the **System** scope and **System** item have permission to access the **Vendor Payment Batch Wizard**.

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**Accounting Permissions and Policies**

**Access Invoices Permission**

Use the Access Invoices permission to specify whether users can use the Invoices program.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Accounting** folder and then click **Access Invoices Program**.

**Scope**

This permission is available for all scopes.

**Policy**

N/A

**Access Overpayment Manager Permission**

Use the Access Overpayment Manager permission to specify whether users can use the Overpayment Manager program and process overpayments.
Location
In the Latitude Permissions and Policies Editor window, expand the Accounting folder and then click Access Overpayment Manager Program.

Scope
This permission is available for the following scopes:
- System
- Role
- User
- Branch
- Business Class
- Customer Group
- Customer

Policy
This policy allows users to add refunds and transfers using Overpayment Manager. Enable the permission for a scope and then specify the settings.

- **Allow the user to edit these selection criteria (for viewing only):** If selected, the user has permission to select or clear the Maximum Amount and Invoiced Only check boxes to display or hide overpaid transactions.

- **Allow refund/transfer of overpayments on un-invoiced payments:** If selected, the user has permission to refund or transfer overpayment amounts not yet invoiced.

- **Maximum amount of overpayment allowed for refund/transfer:** Type the maximum dollar amount allowed for the overpayment transaction in the Overpayment Manager box.

- **Allow refund of PU overpayments to the debtor:** If selected, the user has permission to create refund checks on overpayment amounts for PU (paid us) transaction types.

- **Allow refund of PA overpayments to the debtor:** If selected, the user has permission to create refund checks on overpayment amounts for PA (paid agency) transaction types.

- **Allow refund of PC overpayments to the debtor:** If selected, the user has permission to create refund checks on overpayment amounts for PC (paid client) transaction types.

- **How many days must pass before allowing a refund of overpayment to the debtor:** Time to wait before granting a refund. The system uses this value with the value in the How many days must pass before allowing a transfer of overpayment to another account box.

- **Minimum amount of overpayment refund to the debtor:** Lowest dollar amount allowed when creating overpayment refund checks in the Overpayment Manager box.

- **Allow transfer of PU overpayments to another account:** If selected, the user has permission to transfer funds on overpayment amounts for PU (paid us) transaction types.
• **Allow transfer of PA overpayments to another account:** If selected, the user has permission to transfer funds on overpayment amounts for PA (paid agency) transaction types.

• **Allow transfer of PC overpayments to another account:** If selected, the user has permission to transfer funds on overpayment amounts for PC (paid client) transaction types.

• **How many days must pass before allowing a transfer of overpayment to another account:** Time to wait before granting a fund transfer. The system uses this value with the value in the **How many days must pass before allowing a refund of overpayment to the debtor** box.

• **Minimum amount of an overpayment transfer to another account:** Lowest dollar amount allowed when transferring funds in the **Overpayment Manager** box.

• **Have the Overpayment Manager application create a check when the batch is created:** If selected, the system creates a check record for the refund. Process the batch or delete the check that the system created. You can print the check from the **Check Register** in Latitude Invoices.

### Enter AR Payments Permission

Use the Enter AR Payments permission to specify whether users can add accounts receivable payment information in the Invoices program to apply toward customer invoices.

#### Location

In the **Latitude Permissions and Policies Editor** window, expand the **Accounting** folder and then click **Enter AR Payments**.

#### Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Business Class
- Customer Group
- Customer

#### Policy

N/A

### Enter Bank Transactions Permission

Use the Enter Bank Transactions permission to specify whether users can add bank transaction information for trust accounts in the Invoices program.

#### Location
In the Latitude Permissions and Policies Editor window, expand the Accounting folder and then click Enter Bank Transactions.

**Scope**

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Business Class
- Customer Group
- Customer

**Policy**

N/A

**Generate Invoices Permission**

Use the Generate Invoices permission to specify whether users can create customer invoices in the Invoices program.

**Location**

In the Latitude Permissions and Policies Editor window, expand the Accounting folder and then click Generate Invoices.

**Scope**

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Business Class
- Customer Group
- Customer

**Policy**

N/A
Generate Statements Permission

Use the Generate Statements permission to specify whether users can create customer statements in the Invoices program.

Location

In the Latitude Permissions and Policies Editor window, expand the Accounting folder and then click Generate Statements.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Business Class
- Customer Group
- Customer

Policy

N/A

Print Checks Permission

Use the Print Checks permission to specify whether users can print checks for customers in the Invoices program.

Location

In the Latitude Permissions and Policies Editor window, expand the Accounting folder and then click Print Checks.

Scope

This permission is available for all scopes.

Policy

N/A

Accounts Permissions and Policies

Access Account Permission

Use the Access Account permission to specify whether users can view debtor account information.

Location
In the **Latitude Permissions and Policies Editor** window, expand the **Accounts** folder and then click **Access Account**.

**Scope**
This permission is available for all scopes.

**Policy**
N/A

**Access AIM Assigned Account Permission**
Use the Access AIM Assigned Account permission to specify whether users can view an account assigned to an agency using AIM.

**Location**
In the **Latitude Permissions and Policies Editor** window, expand the **Accounts** folder and then click **Access AIM Assigned Account**.

**Scope**
This permission is available for the following scopes:
- System
- Role
- User

**Policy**
N/A

**Access Archived Account Permission**
Use the Access Archived Account permission to specify whether users can view an archived account. This permission is not related to the user's permissions to archive or restore accounts, but can prevent users from displaying archived accounts.

**Location**
In the **Latitude Permissions and Policies Editor** window, expand the **Accounts** folder and then click **Access Archived Account**.

**Scope**
This permission is available for all scopes.

**Policy**
N/A

**Access Clerical Queues Permission**
Use the Access Clerical Queues permission to specify whether users can view accounts in the clerical queue.
Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Access Clerical Queues.

Scope
This permission is available for all scopes.

Policy
N/A

Access Custom Queues Permission
Use the Access Custom Queues permission to specify whether users can view accounts in a custom queue.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Access Custom Queues.

Scope
This permission is available for all scopes.

Policy
N/A

Access Forwarded Account Permission
Use the Access Forwarded Account permission to specify whether users can view an account that your agency forwarded to an outside attorney.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Access Forwarded Account.

Scope
This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy
This policy allows your organization to specify whether to display a warning regarding a forwarded account. Enable the permission for a scope and specify the settings.
• **Display a warning to the user to alert them that the account has been forwarded to an attorney or forwarder:** If selected, displays a warning indicating that an attorney or forwarder holds the account.

**Access Legal Account Permission**

Use the Access Legal Account permission to specify whether users can view an account that has a legal case associated to it.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Accounts** folder and then click **Access Legal Account**.

**Scope**

This permission is available for all scopes.

**Policy**

This policy allows your organization to specify whether to display a warning regarding an account with a legal case. Enable the permission for a scope and specify the settings.

- **Display a warning to the user to alert them that the account is currently in legal**
  
  If selected, displays a warning indicating that the account has a legal case associated to it.

**Access Outside Branch Permission**

Use the Access Outside Branch permission to specify whether users can view accounts outside the users' assigned branch.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Accounts** folder and then click **Access Outside Branch**.

**Scope**

This permission is available for all scopes.

**Policy**

This policy allows your organization to specify the "outside" branches for which users can and cannot view accounts. Enable the permission for a scope and then specify the settings.

- **Restrict access to specific branches:** If selected, allows the user to view accounts for the user's own branch and the selected branches only. If cleared, allows the user to view accounts for all branches.

- **Branches:** If selected AND you selected the **Restrict access to specific branches** check box, the user can view accounts for that branch. If cleared AND you selected the **Restrict access to specific branches** check box, the user cannot view accounts for that branch. If you didn't select the **Restrict access to specific branches** check box, the user can view accounts for all branches.

**Note:** If you add a branch after setting the policy, update the policy to include or exclude the new branch.
Access Returned Account Permission

Use the Access Returned Account permission to specify whether users can view accounts flagged as returned to the customer (queue level 999).

Location

In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Access Returned Account.

Scope

This permission is available for all scopes.

Policy

N/A

Access Sold Account Permission

Use the Access Sold Account permission to specify whether users can view accounts flagged as sold using Portfolio Manager.

Location

In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Access Sold Account.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Access Supervisor Queues Permission

Use the Access Supervisor Queues permission to specify whether users can view accounts that are in a supervisor queue.

Location

In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Access Supervisor Queues.

Scope

This permission is available for all scopes.

Policy
Account Number Change Permission
Use the Account Number Change permission to specify whether users can modify the customer account number.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Account Number Change.

Scope
This permission is available for all scopes.

Policy
N/A

Access Number View Permission
Use the Access Number View permission to specify whether users can view the customer account number.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Access Number View.

Scope
This permission is available for all scopes.

Policy
N/A

Account Secured Change Permission
Use the Account Secured Change permission to specify whether users can indicate whether an account has a secured loan.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Account Secured Change.

Scope
This permission is available for all scopes.

Policy
N/A
Add Phone Numbers Permission
Use the Add Phone Numbers permission to specify whether users can add phone numbers to an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Add Phone Numbers.

Scope
This permission is available for all scopes.

Policy
N/A

Add Responsibility Permission
Use the Add Responsibility permission to specify whether users can flag a co-debtor as responsible for the debt.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Add Responsibility.

Scope
This permission is available for all scopes.

Policy
N/A

Add/Delete Debtors Permission
Use the Add/Delete Debtors permission to specify whether users can add or delete parties on an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Add/Delete Debtors.

Scope
This permission is available for all scopes.

Policy
N/A

Add/Delete Legal Ledger Items Permission
Use the Add/Delete Legal Ledger Items permission to specify whether users can add or delete legal ledger transactions on an account.
Location

In the **Latitude Permissions and Policies Editor** window, expand the **Accounts** folder and then click **Add/Delete Legal Ledger Items**.

Scope

This permission is available for all scopes.

Policy

N/A

Address Change Permission

Use the Address Change permission to specify whether users can modify addresses on an account.

Location

In the **Latitude Permissions and Policies Editor** window, expand the **Accounts** folder and then click **Address Change**.

Scope

This permission is available for all scopes.

Policy

N/A

Alter Big Note Permission

Use the Alter Big Note permission to specify whether users can add or modify "big note" information for an account.

Location

In the **Latitude Permissions and Policies Editor** window, expand the **Accounts** folder and then click **Alter Big Note**.

Scope

This permission is available for all scopes.

Policy

N/A

Alter CBR Permission

Use the Alter CBR permission to specify whether users can modify certain content on a credit bureau report. For more information, see Credit Bureau Reporting.

Location

In the **Latitude Permissions and Policies Editor** window, expand the **Accounts** folder and then click **Alter CBR**.

Scope
This permission is available for all scopes.

Policy
N/A

Alter Charge Off Date Permission
Use the Alter Charge Off Date permission to specify whether users can modify the date that the customer charged off an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Alter Charge Off Date.

Scope
This permission is available for all scopes.

Policy
N/A

Alter Claim Type Permission
Use the Alter Claim Type permission to specify whether users can modify the claim type on an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Alter Claim Type.

Scope
This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Business Class
- Customer
- Customer Group

Policy
N/A

Alter Class of Business Permission
Use the Alter Class of Business permission to specify whether users can modify the class of business assigned to an account.
Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Alter Class of Business.

Scope
This permission is available for the following scopes:
- System
- Role
- User
- Branch
- Business Class
- Customer
- Customer Group

Policy
N/A

Alter Client Date Last Change Permission
Use the Alter Client Date Last Change permission to specify whether users can modify the last date that the customer charged the debtor.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Alter Client Date Last Change.

Scope
This permission is available for all scopes.

Policy
N/A

Alter Client Date Last Paid Permission
Use the Alter Client Date Last Paid permission to specify whether users can modify the last date that the debtor paid the customer.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Alter Client Date Last Paid.

Scope
This permission is available for all scopes.

Policy
Alter Contract Date Permission
Use the Alter Contract Date permission to specify whether users can modify the contract date on an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Alter Contract Date.

Scope
This permission is available for all scopes.

Policy
N/A

Alter Credit Reporting Settings Permission
Use the Alter Credit Reporting Settings permission to specify whether users can modify the credit bureau reporting settings for an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Alter Credit Reporting Settings.

Scope
This permission is available for all scopes.

Policy
N/A

Alter Delinquency Date Permission
Use the Alter Delinquency Date permission to specify whether users can modify the date that an account became delinquent.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Alter Delinquency Date.

Scope
This permission is available for all scopes.

Policy
N/A
Alter ID1 Permission
Use the Alter ID1 permission to specify whether users can modify the user-defined "ID 1" field for an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Alter ID1.

Scope
This permission is available for all scopes.

Policy
N/A

Alter ID2 Permission
Use the Alter ID2 permission to specify whether users can modify the user-defined "ID 2" field for an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Alter ID2.

Scope
This permission is available for all scopes.

Policy
N/A

Alter Other Name Permission
Use the Alter Other Name permission to specify whether users can modify the alternate or alias names for a party on an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Alter Other Name.

Scope
This permission is available for all scopes.

Policy
N/A

Alter User Date 1 Permission
Use the Alter User Date 1 permission to specify whether users can modify the user-defined "User Date 1" field for an account.
Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Alter User Date 1.

Scope
This permission is available for all scopes.

Policy
N/A

Alter User Date 2 Permission
Use the Alter User Date 2 permission to specify whether users can modify the user-defined "User Date 2" field for an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Alter User Date 2.

Scope
This permission is available for all scopes.

Policy
N/A

Alter User Date 3 Permission
Use the Alter User Date 3 permission to specify whether users can modify the user-defined "User Date 3" field for an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Alter User Date 3.

Scope
This permission is available for all scopes.

Policy
N/A

Archive Permissions and Policies
Access Archive/Restore Functionality Permission
Use the Access Archive/Restore Functionality permission to specify whether users can archive and restore account data.

Location
In the **Latitude Permissions and Policies Editor** window, expand the **Accounting** folder, expand the **Archive** folder, and then click **Access Archive/Restore Functionality**.

**Scope**

This permission is available for the following scopes:

- System
- Role
- User
- Branch

**Policy**

This policy allows your organization to specify which archive functionality is available. Enable the permission for a scope and then select the archive permissions.

- **Allow user to run Archive Configuration application**: If selected, allows the user to run Archive Configuration.
- **Allow user to run Archive/Restore application**: If selected, allows the user to run Archive/Restore.
- **Allow user to edit archive relationship**: If selected, allows the user to modify the archive relationship.
- **Allow user to archive account data**: If selected, allows the user to archive account data.
- **Allow user to restore archived data**: If selected, allows the user to restore archived data.

**Enable Archive of Account Data Permission**

Use the Enable Archive of Account Data permission to specify whether users can archive account data.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Accounting** folder, expand the **Archive** folder, and then click **Enable Archive of Account Data**.

**Scope**

This permission is available for the System scope only.

**Policy**

This policy allows your organization to specify the settings for archiving data. Enable the permission for a scope and then select the archive process permissions.

- **Minimum number of months after an account is returned before allowing archive**: Minimum number of months after returning an account before you can archive the account.
- **Add note to account after it has been archived**: If selected, the system adds a note to the account after archiving it.
- **Log archive operations to ArchiveHistory table**: If selected, the system logs archive operations to the ArchiveHistory table.
• **Synchronize archive table schema before every archive/restore operation:** If selected, the system synchronizes table schema before every archive/restore operation. If cleared, users synchronize the schema (when needed) using the Archive Configuration tool.

**Assign to Attorney\Forwardee Permission**

Use the Assign to Attorney\Forwardee permission to specify whether users can assign an account to an attorney or forwardee.

**Location**

In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Assign to Attorney\Forwardee.

**Scope**

This permission is available for all scopes.

**Policy**

N/A

**CBR Delete Button Permission**

Use the CBR Delete Button permission to specify whether users can delete accounts from credit bureau reporting for reasons such as reported in error, fraud, or paid by insurance. For more information, see Delete an Account From Credit Reporting.

**Location**

In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click CBR Delete Button.

**Scope**

This permission is available for the following scopes:

- System
- Role
- User

**Policy**

N/A

**CBR Prevent Flag and Undo Delete Permission**

Use the CBR Prevent Flag and Undo Delete permission to specify whether users can prevent and restore credit reporting for accounts. For more information, see Prevent an Account From Reporting and Restore Credit Reporting for an Account.

**Location**

In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click CBR Prevent Flag and Undo Delete.
Scope
This permission is available for the following scopes:

- System
- Role
- User

Policy
N/A

CBR Utility Tab Permission
Use the CBR Utility Tab permission to specify whether to display or hide the Utility tab on the CB Detail panel. For more information, see Manage Miscellaneous CBR Settings.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click CBR Utility Tab.

Scope
This permission is available for the following scopes:

- System
- Role
- User

Policy
N/A

Change Continue Queueing Setting Permission
Use the Change Continue Queueing Setting permission to specify whether users can flag an account to continue to queue in a collector's queue while it's pending work in a supervisor or clerical queue.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Change Continue Queueing Setting.

Scope
This permission is available for all scopes.

Policy
N/A

Change Interest Rate Permission
Use the Change Interest Rate permission to specify whether users can modify the interest rate on an account.
Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Change Interest Rate.

Scope
This permission is available for all scopes.

Policy
N/A

Change NPC Status Permission
Use the Change NPC Status permission to specify whether users can change the status of an account to "NPC" (No more Post-dated Checks, queue level 011).

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Change NPC Status.

Scope
This permission is available for all scopes.

Policy
N/A

Change Original Creditor Permission
Use the Change Original Creditor permission to specify whether users can modify the original creditor on an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Change Original Creditor.

Scope
This permission is available for all scopes.

Policy
N/A

Change Phone Relationship Permission
Use the Change Phone Relationship permission to specify whether users can modify the phone relationship on an account.

Note: This permission is no longer used.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Change Phone Relationship.

Scope
This permission is available for all scopes.

Policy
N/A

Change Phone Status Permission
Use the Change Phone Status permission to specify whether users can modify the status of a phone number on an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Change Phone Status.

Scope
This permission is available for all scopes.

Policy
N/A

Change Phone Type Permission
Use the Change Phone Type permission to specify whether users can modify the type of phone number on an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Change Phone Type.

Scope
This permission is available for all scopes.

Policy
N/A

Change Previous Creditor Permission
Use the Change Previous Creditor permission to specify whether users can modify the previous creditor on an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Change Previous Creditor.

Scope
Latitude Printable Help for Administrators

This permission is available for all scopes.

Policy
N/A

Change Status Permission

Use the Change Status permission to specify whether users can modify the status of an account. For more information, see Change the Status of an Account.

Location

In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Change Status.

Scope

This permission is available for all scopes.

Policy

This policy allows your organization to specify which account statuses users can and cannot modify. Enable the permission for a scope and then specify the restrictions.

- **Restrict the status from which the user may change the account**: If selected, allows the user to modify the account status when the account is in the specified statuses only.
- **Statuses**: Statuses from which the user can change an account. For example, you can indicate whether the user can modify the status of accounts that have an "active" status.

- **Restrict the status to which the user may change the account**: If selected, allows the user to change the account status to the specified statuses only.
- **Statuses**: Statuses to which the user can change an account. For example, you can indicate whether the user can change accounts to a "pending" status.

**Note**: If you add a status code after setting the policy, update the policy to include or exclude the new status.

Create Misc Extra Data Permission

Use the Create Misc Extra Data permission to specify whether users can add miscellaneous extra data to an account.

Location

In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Create Misc Extra Data.

Scope

This permission is available for all scopes.

Policy

N/A
**Customer Number Change Permission**

Use the Customer Number Change permission to specify whether users can modify the customer on an account.

**Location**

In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Customer Number Change.

**Scope**

This permission is available for all scopes.

**Policy**

N/A

**Delete Phone Numbers Permission**

Use the Delete Phone Numbers permission to specify whether users can delete phone numbers on an account.

**Location**

In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Delete Phone Numbers.

**Scope**

This permission is available for all scopes.

**Policy**

N/A

**DOB Edit Permission**

Use the DOB Edit permission to specify whether users can modify a debtor's date of birth.

**Location**

In the Latitude Permissions and Policies Editor window, expand the Accounts folder, expand the Change DOB folder, and then click DOB - Edit.

**Scope**

This permission is available for all scopes.

**Policy**

N/A

**Documentation Permissions and Policies**

**Attach Documentation Permission**

Use the Attach Documentation permission to specify whether users can attach documentation to an account.
Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder, expand the Documentation folder, and then click Attach Documentation.

Scope
This permission is available for the following scopes:
- System
- Role
- User
- Branch
- Business Class
- Customer Group
- Customer

Policy
N/A

Delete Documentation Permission
Use the Delete Documentation permission to specify whether users can delete documentation from an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder, expand the Documentation folder, and then click Delete Documentation.

Scope
This permission is available for the following scopes:
- System
- Role
- User
- Branch
- Business Class
- Customer Group
- Customer

Policy
N/A

Documentation File Storage Permission
Use the Documentation File Storage permission to specify a file share location for storing documents attached to accounts. If you don't specify a location, the system stores the documents within the database in the Documentation table.

**Location**

In the Latitude Permissions and Policies Editor window, expand the Accounts folder, expand the Documentation folder, and then click Documentation File Storage.

**Scope**

This permission is available for the System scope only.

**Policy**

This policy allows your organization to specify a location for storing attached documents. Enable the permission for a scope and then specify the server path.

- **Documentation File Server:** Server path to which users have file permissions. If this box is blank, the system stores documents attached to accounts in the Latitude database.

**View Attached Documents Permission**

Use the View Attached Documentation permission to specify whether users can view documents attached to an account.

**Location**

In the Latitude Permissions and Policies Editor window, expand the Accounts folder, expand the Documentation folder, and then click Attach Documentation.

**Scope**

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Business Class
- Customer Group
- Customer

**Policy**

This policy allows your organization to specify which document categories are available to users. Enable the permission for a scope and then select the documentation categories.

- **Permitted Categories:** If selected, users can view documents associated to the documentation category. The system includes in this list all custom categories that your organization created.

**Note:** If you add a custom category and you limit categories for the user scope, the system doesn't select the category by default.
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**Driver's License Number Edit Permission**

Use the Driver's License Number Edit permission to specify whether users can modify a driver's license number on an account.

**Location**

In the Latitude Permissions and Policies Editor window, expand the Accounts folder, expand the Change DLN folder, and then click Driver's License Number - Edit.

**Scope**

This permission is available for all scopes.

**Policy**

N/A

**Edit Misc Extra Data Permission**

Use the Edit Misc Extra Data permission to specify whether users can modify miscellaneous extra data on an account.

**Location**

In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Edit Misc Extra Data.

**Scope**

This permission is available for all scopes.

**Policy**

N/A

**Enter Notes Permission**

Use the Enter Notes permission to specify whether users can add notes to an account.

**Location**

In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Enter Notes.

**Scope**

This permission is available for all scopes.

**Policy**

This policy allows your organization to specify which action and result codes are available to users when creating notes. Enable the permission for a scope and then specify the restrictions.

- **Restrict the available action codes to the following**: If selected, the system limits the action codes available for selection to the ones specified only.

- **Action Codes**: Action codes that are available to the user for selection.
Restrict the available result codes to the following: If selected, the system limits the result codes available for selection to the ones specified only.

Result Codes: Result codes that are available to the user for selection.

Note: If you add an action or result code after setting the policy, update the policy accordingly.

Enter Private Notes Permission
Use the Enter Private Notes permission to specify whether users can add private notes to an account. Only users with the View Private Notes permission can view these notes.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Enter Private Notes.

Scope
This permission is available for all scopes.

Policy
N/A

Insurance Info - Add Permission
Use the Insurance Info - Add permission to specify whether users can add insurance information to an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Insurance Info - Add.

Scope
This permission is available for all scopes.

Policy
N/A

Insurance Info - Delete Permission
Use the Insurance Info - Delete permission to specify whether users can delete insurance information from an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Insurance Info - Delete.

Scope
This permission is available for all scopes.

Policy
Insurance Info - Edit Permission
Use the Insurance Info - Edit permission to specify whether users can modify insurance information on an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Insurance Info - Edit.

Scope
This permission is available for all scopes.

Policy
N/A

Insurance Info - View Permission
Use the Insurance Info - View permission to specify whether users can view insurance information on an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Insurance Info - View.

Scope
This permission is available for all scopes.

Policy
N/A

Legal Permissions and Policies
Award Judgment Permission
Use the Award Judgment permission to specify whether users can award judgment on an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder, expand the Legal folder, and then click Award Judgment.

Scope
This permission is available for the following scopes:

- System
- Role
- User
- Branch
This policy allows your organization to specify whether users can override the default money buckets associated to judgment awards. Enable the permission for a scope and then specify the mappings.

- **Allow the user to override the default judgment award mappings**: If selected, users can override the money buckets associated to judgment awards.

### Judgment Award Mappings Permission

Use the Judgment Award Mappings permission to specify whether users can map the money buckets for judgment awards. The system applies the sum of the judgment awards to the account through an adjustment. Users must have the Award Judgment permission to map the buckets.

**Location**

In the Latitude Permissions and Policies Editor window, expand the Accounts folder, expand the Legal folder, and then click Judgment Award Mappings.

**Scope**

This permission is available for the following scopes:

- System
- Business Class
- Customer Group
- Customer

### Policy

This policy allows your organization to specify the money buckets to associate to judgment awards. Enable the permission for a scope and then specify the mappings.

- **Principal Award**: Money bucket in which to store the principal amount awarded.
- **Interest Award**: Money bucket in which to store the interest amount awarded.
- **Court Cost Award**: Money bucket in which to store the court costs awarded.
- **Attorney Cost Award**: Money bucket in which to store the attorney costs awarded.
- **Other Cost Award**: Money bucket in which to store other costs awarded.
- **Additional Awards**: Money bucket in which to store other judgment amounts awarded.

### Reverse Judgment Permission

Use the Reverse Judgment permission to specify whether users can delete a judgment award from an account.

**Location**
In the Latitude Permissions and Policies Editor window, expand the Accounts folder, expand the Legal folder, and then click Reverse Judgment.

**Scope**

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Business Class
- Customer Group
- Customer

**Policy**

N/A

**Modify Patient Info Permission**

Use the Modify Patient Info permission to specify whether users can modify patient information on an account.

**Location**

In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Modify Patient Info.

**Scope**

This permission is available for all scopes.

**Policy**

N/A

**Modify Phone Numbers Permission**

Use the Modify Phone Numbers permission to specify whether users can modify phone numbers on an account.

**Location**

In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Modify Phone Numbers.

**Scope**

This permission is available for all scopes.

**Policy**

N/A
Multiple CBRs Permission
Use the Multiple CBRs permission to specify whether users can request multiple credit bureau reports for an account.

Location
In the **Latitude Permissions and Policies Editor** window, expand the **Accounts** folder and then click **Multiple CBRs**.

Scope
This permission is available for all scopes.

Policy
N/A

My Desk Assignment Permission
Use the My Desk Assignment permission to specify whether users can reassign an account to their own desk.

Location
In the **Latitude Permissions and Policies Editor** window, expand the **Accounts** folder and then click **My Desk Assignment**.

Scope
This permission is available for all scopes.

Policy
N/A

Name Change Permission
Use the Name Change permission to specify whether users can change names of parties on an account.

Location
In the **Latitude Permissions and Policies Editor** window, expand the **Accounts** folder and then click **Name Change**.

Scope
This permission is available for all scopes.

Policy
N/A

Reminders to Others Permission
Use the Reminders to Others permission to specify whether users can create reminders for accounts assigned to other desks.

Location
In the **Latitude Permissions and Policies Editor** window, expand the **Accounts** folder and then click **Reminders to Others**.

### Scope
This permission is available for all scopes.

### Policy
N/A

**Remove Responsibility Permission**
Use the Remove Responsibility permission to specify whether users can flag a party as not responsible for a debt.

### Location
In the **Latitude Permissions and Policies Editor** window, expand the **Accounts** folder and then click **Remove Responsibility**.

### Scope
This permission is available for all scopes.

### Policy
N/A

**Restricted Access Accounts Permission**
Use the Restricted Access Accounts permission to specify whether users view restricted accounts.

### Location
In the **Latitude Permissions and Policies Editor** window, expand the **Accounts** folder and then click **Restricted Access Accounts**.

### Scope
This permission is available for all scopes.

### Policy
N/A

**Run History Report Permission**
Use the Run History Report permission to specify whether users can generate account history reports.

### Location
In the **Latitude Permissions and Policies Editor** window, expand the **Accounts** folder and then click **Run History Report**.

### Scope
This permission is available for all scopes.

### Policy
Search Permission

Use the Search permission to specify whether users can search for accounts.

Location

In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Search.

Scope

This permission is available for all scopes.

Policy

N/A

Show Full Customer Info Permission

Use the Show Full Customer Info permission to specify whether users can view customer information on an account.

Location

In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click Show Full Customer Info.

Scope

This permission is available for all scopes.

Policy

N/A

SSN Change Permission

Use the SSN Change permission to specify whether users can modify the social security number on an account.

Location

In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click SSN Change.

Scope

This permission is available for all scopes.

Policy

N/A

SSN View Permission

Use the SSN View permission to specify whether users can view the entire nine-digit social security number on an account. If not set, users can only view the last four digits.
Location
In the **Latitude Permissions and Policies Editor** window, expand the **Accounts** folder and then click **SSN View**.

Scope
This permission is available for all scopes.

Policy
N/A

**Update Misc Info Permission**
Use the Update Misc Info permission to specify whether users can modify the miscellaneous information on an account.

Location
In the **Latitude Permissions and Policies Editor** window, expand the **Accounts** folder and then click **Update Misc Info**.

Scope
This permission is available for all scopes.

Policy
N/A

**View Credit Reporting History Permission**
Use the View Credit Reporting History permission to specify whether users can view credit bureau reporting history on an account.

Location
In the **Latitude Permissions and Policies Editor** window, expand the **Accounts** folder and then click **View Credit Reporting History**.

Scope
This permission is available for all scopes.

Policy
N/A

**View Full Customer Info Permission**
Use the View Full Customer Info permission to specify whether users can view customer information on an account.

Location
In the **Latitude Permissions and Policies Editor** window, expand the **Accounts** folder and then click **View Full Customer Info**.
Scope
This permission is available for all scopes.

Policy
N/A

View History Permission
Use the View History permission to specify whether users can view history information for an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click View History.

Scope
This permission is available for all scopes.

Policy
N/A

View Payment Details Permission
Use the View Payment Details permission to specify whether users can view payment details on an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click View Payment Details.

Scope
This permission is available for all scopes.

Policy
N/A

View Payments Permission
Use the View Payments permission to specify whether users can view payments on an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click View Payments.

Scope
This permission is available for all scopes.

Policy
N/A
View PODs Permission
Use the View PODs permission to specify whether users can view the PODs (Particulars of Debt) on an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click View PODs.

Scope
This permission is available for all scopes.

Policy
N/A

View Private Notes Permission
Use the View Private Notes permission to specify whether users can view private notes on an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click View Private Notes.

Scope
This permission is available for all scopes.

Policy
N/A

Work Other Desks Permission
Use the View Other Desks permission to specify whether users can work accounts assigned to other desks.

Location
In the Latitude Permissions and Policies Editor window, expand the Accounts folder and then click View Other Desks.

Scope
This permission is available for all scopes.

Policy
N/A

Admin Permissions and Policies

ABA Maint Permission
Use the ABA Maint permission to specify whether users can maintain ABA routing numbers.
Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click ABA Maint.

Scope
This permission is available for all scopes.

Policy
N/A

Access Custodian Editor Permission
Use the Access Custodian Editor permission to specify whether users can use Custodian Editor.

Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Access Custodian Editor.

Scope
This permission is available for the following scopes:
- System
- Role
- User
- Branch

Policy
N/A

Access Custom Cust Groups Permission
Use the Access Custom Cust Groups permission to specify whether users can maintain customer groups.

Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Access Custom Cust Groups.

Scope
This permission is available for all scopes.

Policy
N/A

Access Maintenance Menu Permission
Use the Access Maintenance Menu permission to specify whether users can view the Maintenance menu.
Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Access Maintenance Menu.

Scope
This permission is available for all scopes.

Policy
N/A

Action\Result Codes Permission
Use the Action\Result Codes permission to specify whether users can maintain action and result codes.

Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Action\Result Codes.

Scope
This permission is available for all scopes.

Policy
N/A

Assign Permissions Permission
Use the Assign Permissions permission to specify whether users can assign permissions and policies.

Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Assign Permissions.

Scope
This permission is available for all scopes.

Policy
N/A

Attorney Forwardee Codes Permission
Use the Attorney Forwardee Codes permission to specify whether users can maintain attorney and forwardee codes.

Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Attorney Forwardee Codes.

Scope
This permission is available for all scopes.
Policy
N/A

Bank Codes Permission
Use the Bank Codes permission to specify whether users can maintain bank codes.

Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Bank Codes.

Scope
This permission is available for the following scopes:
  - System
  - Role
  - User
  - Branch

Policy
N/A

Banks Maint Permission
Use the Banks Maint permission to specify whether users can maintain trust bank accounts.

Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Banks Maint.

Scope
This permission is available for all scopes.

Policy
N/A

Branch Codes Permission
Use the Branch Codes permission to specify whether users can maintain branch codes.

Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Branch Codes.

Scope
This permission is available for all scopes.

Policy
Care Types Permission

Use the Care Types permission to specify whether users can add and modify care types. For more information, see Care Types.

Location

In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Care Types.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Change User Settings Permission

Use the Change User Settings permission to specify whether users can maintain user accounts.

Location

In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Change User Settings.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Claim Type Permission

Use the Claim Type permission to specify whether users can maintain claim types.

Location

In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Claim Type.
Scope
This permission is available for all scopes.

Policy
N/A

**Class of Business Permission**
Use the Class of Business permission to specify whether users can maintain classes of business.

Location
In the *Latitude Permissions and Policies Editor* window, expand the *Admin* folder and then click *Class of Business*.

Scope
This permission is available for all scopes.

Policy
N/A

**Complaint Categories Permission**
Use the Complaint Categories permission to specify whether users can add or modify complaint categories. For more information, see Complaints.

Location
In the *Latitude Permissions and Policies Editor* window, expand the *Admin* folder and then click *Complaint Categories*.

Scope
This permission is available for the following scopes:

- System
- Role
- User

Policy
N/A

**Configure Query Designer Conditions Permission**
Use the Configure Query Designer Conditions permission to specify whether users can use Condition Builder to maintain selection conditions for the Latitude Query Designer tool.

Location
In the *Latitude Permissions and Policies Editor* window, expand the *Admin* folder and then click *Configure Query Designer Conditions*.

Scope
Configure Services Permission
Use the Configure Services permission to specify whether users can maintain outside services.

Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Configure Services.

Scope
This permission is available for all scopes.

Policy
N/A

Control Settings Permission
Use the Control Settings permission to specify whether users can maintain system control settings.

Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Control Settings.

Scope
This permission is available for all scopes.

Policy
N/A

Court Case Status Permission
Use the Court Case Status permission to specify whether users can maintain court case status codes.

Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Court Case Status.

Scope
This permission is available for the following scopes:

- System
- Role
- User
- Branch
Policy
N/A

Courts Permission
Use the Courts permission to specify whether users can maintain court information.

Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Courts.

Scope
This permission is available for all scopes.

Policy
N/A

Create New Desks Permission
Use the Create New Desks permission to specify whether users can add desks.

Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Create New Desks.

Scope
This permission is available for all scopes.

Policy
N/A

Create New Roles Permission
Use the Create New Roles permission to specify whether users can add user roles.

Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Create New Roles.

Scope
This permission is available for all scopes.

Policy
N/A

Create New Users Permission
Use the Create New Users permission to specify whether users can add user accounts.

Location
In the **Latitude Permissions and Policies Editor** window, expand the **Admin** folder and then click **Create New Users**.

**Scope**
This permission is available for all scopes.

**Policy**
N/A

**Credit Card Types Permission**
Use the Credit Card Types permission to specify whether users can maintain credit card types.

**Location**
In the **Latitude Permissions and Policies Editor** window, expand the **Admin** folder and then click **Credit Card Types**.

**Scope**
This permission is available for all scopes.

**Policy**
N/A

**Crystal Reports Permission**
Use the Crystal Reports permission to specify whether users can maintain Crystal Report properties.

**Location**
In the **Latitude Permissions and Policies Editor** window, expand the **Admin** folder and then click **Crystal Reports**.

**Scope**
This permission is available for all scopes.

**Policy**
N/A

**Custom List Permission**
Use the Custom List permission to specify whether users can add and modify custom data in the **Custom Data** panel. For more information, see **Custom Data**.

**Location**
In the **Latitude Permissions and Policies Editor** window, expand the **Admin** folder and then click **Custom List**.

**Scope**
This permission is available for the following scopes:

- **System**
• Role
• User

Policy
N/A

Debtor Asset Types Permission
Use the Debtor Asset Types permission to specify whether users can maintain debtor asset types.

Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Debtor Asset Types.

Scope
This permission is available for all scopes.

Policy
N/A

Delete Roles Permission
Use the Delete Roles permission to specify whether users can delete user roles.

Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Delete Roles.

Scope
This permission is available for all scopes.

Policy
N/A

Department Maint Permission
Use the Department Maint permission to specify whether users can maintain company departments.

Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Department Maint.

Scope
This permission is available for the following scopes:
• System
• Role
• User
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- Branch

Policy
N/A

Desks Maint Permission
Use the Desks Maint permission to specify whether users can maintain collector desks.

Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Desks Maint.

Scope
This permission is available for all scopes.

Policy
N/A

Dispute Types Permission
Use the Dispute Types permission to specify whether users can add or modify dispute types. For more information, see Disputes.

Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Dispute Types.

Scope
This permission is available for the following scopes:
- System
- Role
- User

Policy
N/A

Email Settings Permission
Use the Email Settings permission to specify whether users can configure email settings.

Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Email Settings.

Scope
This permission is available for the System scope only.
Policy
This policy allows your organization to specify the configuration used to send email messages through Simple Mail Transfer Protocol (SMTP). Enable the permission for a scope and then specify the email message settings at the system level.

- **SMTP Server**: mailserver.domain_name
- **Port (0=default)**: If the port 0, use the default SMTP port of 25. Otherwise, specify the port number to use.
- **Connect Using Secure Sockets Layer**: Select to apply SSL.
- **Authentication**: The options are:
  - **Anonymous** (default) = no authentication
  - **Basic** = Provide a user name and password and select SSL
  - **Integrated** = Use Windows authentication
- **Username and Password**: If you selected **Basic Authentication**, the user name and password to use.
- **Sender Domain**: Domain address used for email messages (for example, inin.com).
- **Timeout[sec]**: Number of seconds to wait when sending an email message before displaying a time-out message.

Extra Data Codes Permission
Use the Extra Data Codes permission to specify whether users can maintain Extra Data codes.

Location
In the **Latitude Permissions and Policies Editor** window, expand the **Admin** folder and then click **Extra Data Codes**.

Scope
This permission is available for all scopes.

Policy
N/A

Fee Schedules Permission
Use the Fee Schedules permission to specify whether users can maintain fee schedules.

Location
In the **Latitude Permissions and Policies Editor** window, expand the **Admin** folder and then click **Fee Schedules**.

Scope
This permission is available for all scopes.
Financial Hardships Permission
Use the Financial Hardships permission to specify whether users can add and modify financial hardship types. For more information, see Hardship Types.

Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Financial Hardships.

Scope
This permission is available for the following scopes:
- System
- Role
- User

Legal Ledger Types Permission
Use the Legal Ledger Types permission to specify whether users can maintain legal ledger types.

Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Legal Ledger Types.

Scope
This permission is available for all scopes.

PayMethod Codes Permission
Use the PayMethod Codes permission to specify whether users can maintain payment method codes.

Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click PayMethod Codes.

Scope
This permission is available for all scopes.
QLevel Codes Permission
Use the QLevel Codes permission to specify whether users can maintain queue level codes.

Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click QLevel Codes.

Scope
This permission is available for all scopes.

Policy
N/A

Salesman Codes Permission
Use the Salesman Codes permission to specify whether users can maintain salesman codes.

Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Salesman Codes.

Scope
This permission is available for all scopes.

Policy
N/A

States Maint Permission
Use the States Maint permission to specify whether users can maintain state codes and settings.

Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click States Maint.

Scope
This permission is available for the following scopes:
- System
- Role
- User
- Branch

Policy
N/A
**Status Codes Permission**

Use the Status Codes permission to specify whether users can maintain status codes.

**Location**

In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Status Codes.

**Scope**

This permission is available for all scopes.

**Policy**

N/A

**Surcharge Type Maint Permission**

Use the Surcharge Type Maint permission to specify whether users can maintain surcharge types.

**Location**

In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Surcharge Type Maint.

**Scope**

This permission is available for the following scopes:

- System
- Role
- User
- Branch

**Policy**

N/A

**System Control Codes Permission**

Use the System Control Codes permission to specify whether users can maintain system codes and settings.

**Location**

In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click System Control Codes.

**Scope**

This permission is available for all scopes.

**Policy**

N/A
**Team Maint Permission**

Use the Team Maint permission to specify whether users can maintain company teams.

**Location**

In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Team Maint.

**Scope**

This permission is available for the following scopes:

- System
- Role
- User
- Branch

**Policy**

N/A

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**Update Courts Permission**

Use the Update Courts permission to specify whether users can maintain court information.

**Location**

In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Update Courts.

**Scope**

This permission is available for all scopes.

**Policy**

N/A

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**Use Goals Manager Permission**

Use the Use Goals Manager permission to specify whether users can use Goals Manager.

**Location**

In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Use Goals Manager.

**Scope**

This permission is available for the following scopes:

- System
- Role
- User
• Branch

Policy
N/A

Use Link Console Permission
Use the Use Link Console permission to specify whether users can use Link Console.

Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click Use Link Console.

Scope
This permission is available for all scopes.

Policy
N/A

View Courts Permission
Use the View Courts permission to specify whether users can view court information.

Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click View Courts.

Scope
This permission is available for all scopes.

Policy
N/A

View User Settings Permission
Use the View User Settings permission to specify whether users can view permissions set for users.

Location
In the Latitude Permissions and Policies Editor window, expand the Admin folder and then click View User Settings.

Scope
This permission is available for all scopes.

Policy
N/A

ZIP Code Maintenance Permission
Use the ZIP Code Maintenance permission to specify whether users can maintain ZIP Codes.
Location
In the **Latitude Permissions and Policies Editor** window, expand the **Admin** folder and then click **ZIP Code Maintenance**.

Scope
This permission is available for all scopes.

Policy
N/A

**AIM Permissions and Policies**

**Access Reports Permission**
Use the Access Reports permission to specify whether users can view reports in AIM.

Location
In the **Latitude Permissions and Policies Editor** window, expand the **AIM** folder and then click **Access Reports**.

Scope
This permission is available for all scopes.

Policy
N/A

**Access Tools Permission**
Use the Access Tools permission to specify whether users can use the tools in AIM.

Location
In the **Latitude Permissions and Policies Editor** window, expand the **AIM** folder and then click **Access Tools**.

Scope
This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy
N/A
Add\Edit\Delete Account Filters Permission
Use the Add\Edit\Delete Account Filters permission to specify whether users can maintain account filters in AIM.

Location
In the Latitude Permissions and Policies Editor window, expand the AIM folder and then click Add\Edit\Delete Account Filters.

Scope
This permission is available for the following scopes:
- System
- Role
- User
- Branch

Policy
N/A

Add\Edit\Delete Agencies Permission
Use the Add\Edit\Delete Agencies permission to specify whether users can maintain agencies in AIM.

Location
In the Latitude Permissions and Policies Editor window, expand the AIM folder and then click Add\Edit\Delete Agencies.

Scope
This permission is available for the following scopes:
- System
- Role
- User
- Branch

Policy
N/A

Add\Edit\Delete Business Rules Permission
Use the Add\Edit\Delete Business Rules permission to specify whether users can maintain business rules in AIM.

Location
In the Latitude Permissions and Policies Editor window, expand the AIM folder and then click Add\Edit\Delete Business Rules.
Scope
This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy
N/A

Add\Edit\Delete Distribution Templates Permission
Use the Add\Edit\Delete Distribution Templates permission to specify whether users can maintain distribution templates in AIM.

Location
In the Latitude Permissions and Policies Editor window, expand the AIM folder and then click Add\Edit\Delete Distribution Templates.

Scope
This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy
N/A

Run Actions Permission
Use the Run Actions permission to specify whether users can create placements, final recalls, and pending recalls. If configured, also allows users to import and export files.

Location
In the Latitude Permissions and Policies Editor window, expand the AIM folder and then click Run Actions.

Scope
This permission is available for the following scopes:

- System
- Role
Use AIM Permission
Use the Use AIM permission to specify whether users can use AIM.

Location
In the Latitude Permissions and Policies Editor window, expand the AIM folder and then click Use AIM.

Scope
This permission is available for the following scopes:
- System
- Role
- User
- Branch

Use AIM Plugin Permission
Use the Use AIM Plugin permission to specify whether users can use the AIM plug-in.

Location
In the Latitude Permissions and Policies Editor window, expand the AIM folder and then click Use AIM Plugin.

Scope
This permission is available for the following scopes:
- System
- Role
- User
- Branch

View Account Filters Permission
Use the View Account Filters permission to specify whether users can view account filters in AIM.
Location
In the Latitude Permissions and Policies Editor window, expand the AIM folder and then click View Account Filters.

Scope
This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy
N/A

View Agencies Permission
Use the View Agencies permission to specify whether users can view agencies in AIM.

Location
In the Latitude Permissions and Policies Editor window, expand the AIM folder and then click View Agencies.

Scope
This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy
N/A

View Business Rules Permission
Use the View Business Rules permission to specify whether users can view business rules in AIM.

Location
In the Latitude Permissions and Policies Editor window, expand the AIM folder and then click View Business Rules.

Scope
This permission is available for the following scopes:

- System
View Distribution Templates Permission

Use the View Distribution Templates permission to specify whether users can view distribution templates in AIM.

Location

In the Latitude Permissions and Policies Editor window, expand the AIM folder and then click View Distribution Templates.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

AIM Panel Permissions and Policies

Order Media Permission

Use the Order Media permission to specify whether users can order media using the AIM panel in Latitude.

Location

In the Latitude Permissions and Policies Editor window, expand the AIM Panel folder and then click Order Media.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch
Policy
N/A

Place\Recall Permission
Use the Place\Recall permission to specify whether users can place an account with an outside collection agency or attorney, and recall the placed account using the AIM panel in Latitude.

Location
In the Latitude Permissions and Policies Editor window, expand the AIM Panel folder and then click Place\Recall.

Scope
This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy
N/A

Recourse Permission
Use the Recourse permission to specify whether users can maintain recourse information using the AIM panel in Latitude.

Location
In the Latitude Permissions and Policies Editor window, expand the AIM Panel folder and then click Recourse.

Scope
This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy
N/A

View AIM Actions Permission
Use the View AIM Actions permission to specify whether users can view AIM actions in the AIM panel in Latitude
Location
In the **Latitude Permissions and Policies Editor** window, expand the **AIM Panel** folder and then click **View AIM Actions**.

**Scope**
This permission is available for the following scopes:
- System
- Role
- User
- Branch

**Policy**
N/A

**View AIM Panel Permission**
Use the View AIM Panel permission to specify whether users can view the **AIM** panel in Latitude

**Location**
In the **Latitude Permissions and Policies Editor** window, expand the **AIM Panel** folder and then click **View AIM Panel**.

**Scope**
This permission is available for the following scopes:
- System
- Role
- User
- Branch

**Policy**
N/A

**View PM Actions Permission**
Use the View PM Actions permission to specify whether users can view PM actions in the **AIM** panel in Latitude

**Location**
In the **Latitude Permissions and Policies Editor** window, expand the **AIM Panel** folder and then click **View PM Actions**.

**Scope**
This permission is available for the following scopes:
• System
• Role
• User
• Branch

Policy
N/A

Arrangements Permissions and Policies

Add Payments Permission
Use the Add Payments permission to specify whether users can add payments to an existing non-settlement arrangement. For more information, see Add a Payment to a Payment Arrangement.

Location
In the Latitude Permissions and Policies Editor window, expand the Arrangements folder and then click Add Payments.

Scope
This permission is available for the following scopes:
• System
• Role
• User

Policy
N/A

Allow Partial Settlements Permission
Use the Allow Partial Settlements permission to specify whether users can create a settlement arrangement that does not fulfill the terms of that settlement yet. The arrangement must meet the specified requirements. The settlement information remains on the account and a subsequent arrangement resumes it.

Location
In the Latitude Permissions and Policies Editor window, expand the Arrangements folder and then click Allow Partial Settlements.

Scope
This permission is available for all scopes.

Policy
This policy allows your organization to specify whether users can accept partial settlements. Enable the permission for a scope and then specify the settings.
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- **Minimum Payments**: Minimum number of payments to accept as a partial settlement.
- **Minimum Amount**: Minimum payment dollar amount to accept as a partial settlement.
- **Payment Methods**: Payment methods allowed for a partial settlement.

**Auto Calculate Permission**

Use the Auto Calculate permission to specify whether the system calculates arrangements as a user changes values or whether the user can calculate the arrangement on demand. For more information, see Select a Settlement Arrangement, Calculate the Arrangement (Normal Mode), or Calculate the Arrangement (Simple Mode).

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Arrangements** folder and then click **Auto Calculate**.

**Scope**

This permission is available for the following scopes:

- System
- Business Class
- Customer Group
- Customer

**Policy**

This policy allows your organization to specify whether the system calculates arrangements automatically. Enable the permission for a scope and then specify the settings.

- **Auto Calculate on the settlement and arrangement screen**: If selected, the system calculates arrangements as users change values in the arrangement, which decreases performance. If cleared, users can calculate the arrangement on demand.

**Calculation User Interface Permission**

Use the Calculation User Interface permission to specify which arrangement calculation method to display to users, normal or simple mode.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Arrangements** folder and then click **Calculation User Interface**.

**Scope**

This permission is available for the following scopes:

- System
- Role
- User
Policy
This policy allows your organization to specify which arrangement calculation method to display to users. Enable the permission for a scope and then specify the calculation mode.

- **Calculation Mode:** Arrangement calculation method to display to users.

**Edit Projected Fees Permission**

Use the Edit Projected Fees permission to specify whether users can modify projected fees on scheduled credit card and ACH payments. For more information, see Modify Projected Fees for a Payment Arrangement.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Arrangements** folder and then click **Edit Projected Fees**.

**Scope**

This permission is available for the following scopes:

- System
- Role
- User
- Branch

**Policy**

N/A

**Interest Deferral Permission**

Use the Interest Deferral permission to specify whether users can defer interest on an account during the arrangement, as long as it meets the specified requirements.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Arrangements** folder and then click **Interest Deferral**.

**Scope**

This permission is available for all scopes.

**Policy**
This policy allows your organization to specify whether accounts permit interest deferral. Enable the permission for a scope and then specify the settings.

- **Minimum Payments**: Minimum number of payments to accept for interest deferment.
- **Minimum Amount**: Minimum payment amount to accept for interest deferment.
- **Payment Methods**: Payment methods allowed for interest deferment.

**Linked Payment Spread Method Permission**

Use the Linked Payment Spread Method permission to specify how to spread payments across linked accounts.

**Location**

In the [Latitude Permissions and Policies Editor](#) window, expand the [[Arrangements](#)] folder and then click **Linked Payment Spread Method**.

**Scope**

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Business Class
- Customer Group
- Customer

**Policy**

This policy allows your organization to specify how payments spread across linked accounts. Enable the permission for a scope and then specify the settings.

- **Spread method**: Method for spreading payments across linked accounts.
- **Allow the user to manually specify the payment spread**: If selected, the user can spread the payment manually.
- **Sort Field 1 through 4**: Order in which to spread the payment across accounts.

**Override Due Dates Permission**

Use the Override Due Dates permission to specify whether the system can adjust payment arrangement due dates so that they don't fall on weekends or holidays.

**Location**

In the [Latitude Permissions and Policies Editor](#) window, expand the [[Arrangements](#)] folder and then click **Override Due Dates**.
Scope
This permission is available for the System scope only.

Policy
N/A

Post-Dated Check Payment Method Permission
Use the Post-Dated Check Payment Method permission to specify which payment method to use for post-dated checks.

Location
In the Latitude Permissions and Policies Editor window, expand the Arrangements folder and then click Post-Dated Check Payment Method.

Scope
This permission is available for the following scopes:

- System
- Business Class
- Customer Group
- Customer

Policy
This policy allows your organization to specify the payment method to use for post-dated checks. Enable the permission for a scope and then select the post-dated check payment method.

- Post-Dated Check Payment Method: Payment method to use for post-dated checks.

Post-Dated Check Payment Several Permission
Use the Post-Dated Check Payment Several permission to specify whether to accept ACH and paper draft payment methods for post-dated checks.

Location
In the Latitude Permissions and Policies Editor window, expand the Arrangements folder and then click Post-Dated Check Payment Several.

Scope
This permission is available for the following scopes:

- System
- Business Class
- Customer Group
- Customer

Policy
State Settlement Options Permission

Use the State Settlement Options permission to specify the minimum settlement adjustment percentage for states.

Location

In the Latitude Permissions and Policies Editor window, expand the Arrangements folder and then click State Settlement Options.

Scope

This permission is available for the following scopes:

- System
- Business Class
- Customer Group
- Customer

Policy

This policy allows your organization to specify whether users can adjust the minimum settlement percentage for specific states. Enable the permission for a scope and then specify the settings.

- Code: If selected, the state allows adjustment of the settlement percentage.
- Settlement Adjustment: Settlement adjustment percentage and then specify the adjustment amount for each state selected.

Tweak Arrangements Permission

Use the Tweak Arrangements permission to specify whether users can modify payment arrangement dates and amounts.

Location

In the Latitude Permissions and Policies Editor window, expand the Arrangements folder and then click Tweak Arrangements.

Scope

This permission is available for all scopes.

Policy

This policy allows your organization to specify whether users can modify payment arrangement dates and amounts. Enable the permission for a scope and then specify the settings.

- Permitted to make changes to Arrangements: If selected, users can modify payment arrangement dates and amounts.
Tweak Arrangements Approval Permission

Use the Tweak Arrangements Approval permission to specify the approval required for modifying payment arrangement dates and amounts.

Location

In the Latitude Permissions and Policies Editor window, expand the Arrangements folder and then click Tweak Arrangements Approval.

Scope

This permission is available for all scopes.

Policy

This policy allows your organization to specify whether modifying payment arrangement dates and amounts requires approval. Enable the permission for a scope and then specify the settings.

- Changes to Simple Credit Card Arrangements: Changes allowed for simple credit card arrangements.
- Changes to Linked Credit Card Arrangements: Changes allowed for linked credit card arrangements.
- Changes to Simple PDC Arrangements: Changes allowed for simple PDC arrangements.
- Changes to Linked PDC Arrangements: Changes allowed for linked PDC arrangements.
- Changes to Simple Promise Arrangements: Changes allowed for simple promise arrangements.
- Changes to Linked Promise Arrangements: Changes allowed for linked promise arrangements.

Automobile Panel Permissions and Policies

Allow Editing Permission

Use the Allow Editing permission to specify whether users can modify information in the Automotive panel.

Location

In the Latitude Permissions and Policies Editor window, expand the Automobile Panel folder and then click Allow Editing.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy
Credit Cards Permissions and Policies

Add Credit Card Payments Permission

Use the Add Credit Card Payments permission to specify whether users can add credit card information and credit card payments.

Location

In the Latitude Permissions and Policies Editor window, expand the Credit Cards folder and then click Add Credit Card Payments.

Scope

This permission is available for all scopes.

Policy

This policy allows your organization to specify the business rules to enforce when a user adds credit card payments. Enable the permission for a scope and then specify the settings.

Note: If using the Override Rules option, the supervisor's rules are in effect for the current promise instead of the user's rules.

- **User is not required to observe customer business rules:** If selected, credit card settings applied to a user, role, or desk scope take precedence over settings applied for a customer or customer group scope (system doesn't enforce customer policies).

  The following settings apply for the first PDC item in a series.

  - **Minimum Payment Amount** and **Minimum Balance Percent:** Minimum amount for the credit card payment. This value is a specific monetary amount or a percentage of the current balance of the account. The system requires the higher of the two values for the first item. If the current balance of the account is less than this amount, the current payment equals the balance.

  - **Maximum Days to Payment:** Number of days into the future that a user can post-date the first credit card payment.

  - The following settings apply to other items in a series.

  - **Maximum Payments:** Maximum number of credit card payments (up to 250) that a user can include in the series.

  Note: If you are upgrading to Latitude 10.0 SU 8, ensure that this value is greater than 0 (zero) or you cannot create a payment arrangement.

  - **Minimum Subsequent Payment Amount:** Minimum dollar amount for subsequent payments. This value is a specific monetary amount. If the current balance of the account minus the value of the other items is less than this amount, the payment equals the minimum amount.

  - **Maximum Days Between Payments:** Maximum number of days between payments in the series.

  - **Maximum Days to Last Payment:** Maximum number of days into the future from the current date that the user can create the last payment in the series.
• **Allow user to enter settlement arrangement for less than the customer blanket settlement**: If selected, the user does not need to meet blanket settlement percentage requirements when creating a settlement promise amount.

• **Only Debit Cards Accepted**: If selected, your organization accepts debit cards for payments but not credit cards. If cleared, your organization accepts debit and credit cards. For more information, see [Bank Identification Number](#).

• **Accepted Credit Cards**: Credit cards available for selection when creating payments.

• **Validate card number using Luhn 10 formula**: If selected, the system validates credit card numbers to meet the correct check-digit format; otherwise, the system doesn't allow payment entry.

• **Require credit card security code**: If selected, the system requires the credit card security code to save a credit card post-dated transaction.

**Allow Real Time Credit Card Transaction Permission**

Use the Allow Real Time Credit Card Transaction permission to specify whether users can request real-time credit card authorization.

**Location**

In the Latitude Permissions and Policies Editor window, expand the Credit Cards folder and then click Allow Real Time Credit Card Transaction.

**Scope**

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Business Class
- Customer Group
- Customer

**Policy**

This policy allows your organization to specify whether users can submit credit card transaction requests to the real-time credit card processing vendor. Enable the permission for a scope and then specify the settings.

- **Allow realtime processing of post dated credit cards whose due date has arrived**: If selected, users can submit credit card transaction requests to the real-time credit card processing vendor.

**Alter Credit Cards Permission**

Use the Alter Credit Cards permission to specify whether users can modify credit card information for an account.
Location
In the Latitude Permissions and Policies Editor window, expand the Credit Cards folder and then click Alter Credit Cards.

Scope
This permission is available for all scopes.

Policy
N/A

Approve Credit Card Payments Permission
Use the Approve Credit Card Payments permission to specify whether users can approve credit card payments for an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Credit Cards folder and then click Approve Credit Card Payments.

Scope
This permission is available for all scopes.

Policy
N/A

Delete Credit Card Payments Permission
Use the Delete Credit Card Payments permission to specify whether users can delete credit card payments for an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Credit Cards folder and then click Delete Credit Card Payments.

Scope
This permission is available for all scopes.

Policy
N/A

Enable Overrides to PCI DSS Compliance Permission
Use the Enable Overrides to PCI DSS Compliance permission to specify whether users can override the Payment Card Industry Data Security Standard (PCIDSS) compliance requirement.

Location
In the Latitude Permissions and Policies Editor window, expand the Credit Cards folder and then click Enable Overrides to PCI DSS Compliance.
Scope
This permission is available for the System scope only.

Policy
This policy allows your organization to specify whether to permit overrides to the Payment Card Industry Data Security Standard (PCI-DSS) compliance requirement. Enable the permission for a scope and then specify the settings.

Note: Enabling and changing default settings on this policy can result in violation of Payment Card Industry Data Security Standards. Latitude encrypts credit card information and does not include the numbers by default to provide compliance.

- **Save the security code for credit card promises**: If selected, the system saves the three- or four-digit credit card security code in the database (not encrypted).
- **Allow export of unencrypted credit card information to a file**: If selected, the system includes the credit card number stored in the database when creating an export file in Credit Card Management.
- **Allow export of unencrypted credit card information to a report**: If selected, the system includes the credit card number stored in the database when creating reports.

Enable Real Time Credit Card Processing Permission
Use the Enable Real Time Credit Card Processing permission to specify whether the system can post credit card transactions to Latitude immediately after processing them. For more information, see Process a Real-time Credit Card Transaction.

Location
In the **Latitude Permissions and Policies Editor** window, expand the **Credit Cards** folder and then click **Enable Real Time Credit Card Processing**.

Scope
This permission is available for the System scope only.

Policy
This policy allows your organization to specify real-time credit card processing settings. Enable the permission for a scope and then specify the settings.

- **Post Real Time Credit Card transactions processed from the Arrangements panel**: If selected, Latitude posts credit card transactions to your Latitude system immediately. If cleared, Latitude saves the credit card payments in a batch for processing later.

Enter Credit Card Information Permission
Use the Enter Credit Card Information permission to specify whether users can provide credit card information for payments in a payment arrangement. For more information, see Specify Credit Card Information.

Location
In the Latitude Permissions and Policies Editor window, expand the Credit Cards folder and then click Enter Credit Card Information.

Scope
This permission is available for all scopes.

Policy
N/A

Make Up Credit Card Decline Permission
Use the Make Up Credit Card Decline permission to specify whether users can make up a declined credit card payment in a payment arrangement. For more information, see Make Up a Declined Payment.

Location
In the Latitude Permissions and Policies Editor window, expand the Credit Cards folder and then click Make Up Credit Card Decline.

Scope
This permission is available for all scopes.

Policy
This policy allows your organization to specify the number of days a declined payment remains on a payment arrangement after the payment fails. Enable the permission for a scope and then specify the settings.

- Days to Make Up Declined Payment: Number of days a debtor has to make up a declined payment.

Place Hold on Credit Card Payment Permission
Use the Place Hold on Credit Card Payment permission to specify whether users can place credit card payments on hold.

Location
In the Latitude Permissions and Policies Editor window, expand the Credit Cards folder and then click Place Hold on Credit Card Payment.

Scope
This permission is available for all scopes.

Policy
N/A

Real Time Credit Card Vendor Information Permission
Use the Real Time Credit Card Vendor Information permission to specify whether the system can pass account information to the credit card vendor.

Location
In the Latitude Permissions and Policies Editor window, expand the Credit Cards folder and then click Real Time Credit Card Vendor Information.

Scope

This permission is available for the following scopes:

- System
- Business Class
- Customer Group
- Customer

Policy

This policy allows your organization to specify real-time credit card processing settings for the vendor. Enable the permission for a scope and then specify the settings. You can have different vendor accounts set up to receive payments for different customers in your system (segregated by customer or customer group).

- **Vendor Info Parameter 1 through 3**: Codes that the vendor provides for your account. If you have different accounts set up, you can set up these parameters differently for each customer or customer group.

- **Send the surcharge as a separate transaction?**: If selected, the system sends surcharges as a separate transaction. The system sends two transactions to the debtor’s credit card. The second transaction can also incur a second transaction charge from the credit card vendor.

- **Vendor Surcharge Info Parameter 1 through 3**: If you chose to send surcharges as separate transactions, type the accounts to contain the surcharge amounts. If one account holds payment and surcharge amounts, we recommend that you clear the check box and do not complete these boxes.

| Note: The second transaction can incur a separate charge from the credit card vendor. |

Remove Hold on Credit Card Payment Permission

Use the Remove Hold on Credit Card Payment permission to specify whether users can remove holds placed on credit card payments.

Location

In the Latitude Permissions and Policies Editor window, expand the Credit Cards folder and then click Remove Hold on Credit Card Payment.

Scope

This permission is available for all scopes.

Policy

N/A
**Surcharge Options Permission (Credit Cards)**

Use the Surcharge Options permission to specify whether users can modify the surcharge type calculated for credit cards.

**Location**

In the Latitude Permissions and Policies Editor window, expand the Credit Cards folder and then click Surcharge Options.

**Scope**

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Business Class
- Customer Group
- Customer

**Policy**

This policy allows your organization to specify whether users can modify the surcharge for credit card payment arrangements. Enable the permission for a scope and then specify the settings.

- **Allow zero surcharge:** If selected, allows the user to exclude surcharges for all payments in a payment arrangement.
- **Allow manually entered surcharge amount:** If selected, allows the user to specify a surcharge amount to apply to each payment in a payment arrangement.
- **Surcharge Type:** Surcharge types available to the user. You can use the search box to locate a specific surcharge within your system.

**View Credit Card Numbers Permission**

Use the View Credit Card Numbers permission to specify whether users can view credit card numbers.

**Location**

In the Latitude Permissions and Policies Editor window, expand the Credit Cards folder and then click View Credit Card Numbers.

**Scope**

This permission is available for all scopes.

**Policy**

N/A
Bank Identification Number

Latitude uses the Bank Identification Number (BIN) to determine whether a card is a credit or debit card. Your organization must purchase a list of BINs for all card issuers from a third-party vendor and then import the data into the BIN_List table in the Latitude database. Once imported, Latitude validates the card number submitted for payment against the BIN to determine whether to accept the card based on how your organization configured the "Only Debit Cards Accepted" policy in the "Add Credit Card Payments" permission. If your organization doesn't accept credit cards for payments, Latitude compares the first six digits of the card to the BIN in the table and if the card type is "credit," Latitude rejects the payment method and notifies the user.

The following table describes the layout for the BIN file.

<table>
<thead>
<tr>
<th>Field</th>
<th>Length</th>
<th>Type</th>
<th>Description</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>BIN</td>
<td>6</td>
<td>Numeric</td>
<td>First six digits of a credit or debit card number that identify the card issuer.</td>
<td>546616</td>
</tr>
<tr>
<td>Brand</td>
<td>128</td>
<td>String</td>
<td>Card company or vendor that issued the card.</td>
<td>MasterCard Visa</td>
</tr>
<tr>
<td>Bank Name</td>
<td>128</td>
<td>String</td>
<td>Name of the bank or financial institution that issued the card.</td>
<td>Bank of America Wells Fargo</td>
</tr>
<tr>
<td>Type</td>
<td>32</td>
<td>String</td>
<td>Type of card.</td>
<td>Credit Debit</td>
</tr>
<tr>
<td>Level</td>
<td>32</td>
<td>String</td>
<td>Level of card.</td>
<td>Gold Gift Business</td>
</tr>
<tr>
<td>ISOCountry</td>
<td>64</td>
<td>String</td>
<td>Full name of the card's country of origin.</td>
<td>United States</td>
</tr>
<tr>
<td>Info</td>
<td>128</td>
<td>String</td>
<td>More information about the issuing bank, such as contact or alternative contact information.</td>
<td>AAdvantage Executive</td>
</tr>
</tbody>
</table>
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<table>
<thead>
<tr>
<th>Country_ISO</th>
<th>2</th>
<th>Char</th>
<th>Two-letter ISO country code.</th>
<th>US</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country2_ISO</td>
<td>3</td>
<td>Char</td>
<td>Three-letter ISO country code.</td>
<td>USA</td>
</tr>
<tr>
<td>Country3_ISO</td>
<td>3</td>
<td>Numeric</td>
<td>Three-digit ISO country code.</td>
<td>840</td>
</tr>
<tr>
<td>WWW</td>
<td>128</td>
<td>String</td>
<td>URL address of the issuing bank's main website.</td>
<td><a href="http://www.citi.com">www.citi.com</a></td>
</tr>
<tr>
<td>Phone</td>
<td>128</td>
<td>String</td>
<td>Contact phone number of the issuing bank, usually the main branch.</td>
<td>1-888-776-2484</td>
</tr>
</tbody>
</table>

**CUBE Permissions and Policies**

**Server Config Policy Permission**

Use the Server Config Policy permission to specify settings for the Latitude CUBE.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Cube** folder and then click **Server Config Policy**.

**Scope**

This permission is available for the following scopes:

- System
- Role
- User
- Branch

**Policy**

This policy allows your organization to specify settings for the Latitude CUBE. Enable the permission for a scope and then specify the settings.

- **Server for the location of the Latitude.Cube**: Path to the SQL Analysis Services Server (SSAS) for the Latitude CUBE. You can use the Windows server name, IP address, local host, or a named instance.

- **Analysis Services Database name of the Latitude.Cube**: Name of the SQL Analysis Services database that contains the Latitude CUBE. The default name is LatitudeCube.
Customers Permissions and Policies

Add New (Customer) Permission
Use the Add New permission to specify whether users can add customers to the system.

Location
In the Latitude Permissions and Policies Editor window, expand the Customers folder and then click Add New.

Scope
This permission is available for all scopes.

Policy
N/A

Create Contact Note Permission
Use the Create Contact Note permission to specify whether users can add notes regarding contact with a party on an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Customers folder and then click Create Contact Note.

Scope
This permission is available for all scopes.

Policy
N/A

Edit (Customer) Permission
Use the Edit permission to specify whether users can modify customer information.

Location
In the Latitude Permissions and Policies Editor window, expand the Customers folder and then click Edit.

Scope
This permission is available for all scopes.

Policy
N/A

View (Customer) Permission
Use the View permission to specify whether users can view customer information.

Location
In the **Latitude Permissions and Policies Editor** window, expand the **Customers** folder and then click **View**.

**Scope**
This permission is available for all scopes.

**Policy**
N/A

**View Stats Permission**
Use the View Stats permission to specify whether users can view customer statistics.

**Location**
In the **Latitude Permissions and Policies Editor** window, expand the **Customers** folder and then click **View Stats**.

**Scope**
This permission is available for all scopes.

**Policy**
N/A

**Dashboard Permissions and Policies**

**Manage Dashboards Permission**
Use the Manage Dashboards permission to specify whether users can view, create, and modify dashboards in Latitude Dashboard.

**Location**
In the **Latitude Permissions and Policies Editor** window, expand the **Dashboard** folder and then click **Manage Dashboards**.

**Scope**
This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Department
- Team
- Desk

**Policy**
N/A

**View Dashboards Permission**

Use the View Dashboards permission to specify which dashboards users can view and the default dashboard to display when users log on to Latitude Dashboard.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Dashboard** folder and then click **View Dashboards**.

**Scope**

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Department
- Team
- Desk

**Policy**

This policy allows your organization to specify the default dashboard to display and which dashboards users can view. Enable the permission for a scope and then select the dashboards.

- **Home Dashboard**: Default dashboard to display when the user logs on to Latitude Dashboard.
- **View Dashboards**: Dashboards the user can view when logged on to Latitude Dashboard.

**Data Entry Permissions and Policies**

**Add PODs Permission**

Use the Add PODs permission to specify whether users can add Particulars of Debt (POD) to an account.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Data Entry** folder and then click **Add PODs**.

**Scope**

This permission is available for all scopes.

**Policy**

N/A
Balance Adjustment Permission

Use the Balance Adjustment permission to specify whether users can modify the balance on an account using an adjustment entry.

Location

In the Latitude Permissions and Policies Editor window, expand the Data Entry folder and then click Balance Adjustment.

Scope

This permission is available for all scopes.

Policy

N/A

Delete PODs Permission

Use the Delete PODs permission to specify whether users can delete Particulars of Debt (POD) from an account.

Location

In the Latitude Permissions and Policies Editor window, expand the Data Entry folder and then click Delete PODs.

Scope

This permission is available for all scopes.

Policy

N/A

Detail Information Permission

Use the Detail Information permission to specify whether users can modify detail information on an account.

Location

In the Latitude Permissions and Policies Editor window, expand the Data Entry folder and then click Detail Information.

Scope

This permission is available for all scopes.

Policy

N/A

Mail Returns Permission

Use the Mail Returns permission to specify whether users can set a mail return (bad address) flag on an account.
Location
In the Latitude Permissions and Policies Editor window, expand the Data Entry folder and then click Mail Returns.

Scope
This permission is available for all scopes.

Policy
N/A

New Business Entry Permission
Use the New Business Entry permission to specify whether users can create new business records.

Location
In the Latitude Permissions and Policies Editor window, expand the Data Entry folder and then click New Business Entry.

Scope
This permission is available for all scopes.

Policy
N/A

Payment Entry Permission
Use the Payment Entry permission to specify whether users can add payments to a payment batch.

Location
In the Latitude Permissions and Policies Editor window, expand the Data Entry folder and then click Payment Entry.

Scope
This permission is available for all scopes.

Policy
This policy allows your organization to specify whether users can add payments to a batch. Enable the permission for a scope and then specify the settings.

- **Allow payments to be entered on closed accounts**: If selected, allows the user to add payments on closed accounts (queue level 998 or 999).

- **Warn when allowing payments to be entered on closed accounts**: If selected, displays a warning when adding payments on closed accounts. Enable the "Allow payments to be entered on closed accounts" policy.

- **Allow opening of other user's batches**: If selected, allows the user to open a payment batch that another user created.
• **Allow adding payments to other users batches**: If selected, allows the user to add payments to a payment batch that another user created.

• **Allow processing of batches**: If selected, allows the user to process payment batches.

• **Allow processing of other users batches**: If selected, allows the user to process a payment batch that another user created.

• **Allow editing of other users batches**: If selected, allows the user to modify payment batch properties for a payment batch that another user created.

• **Allow deleting of other users batches**: If selected, allows the user to delete a payment batch that another user created.

• **Allow editing of other users batch items**: If selected, allows the user to modify transactions added to a payment batch that another user created.

• **Allow deleting of other users batch items**: If selected, allows the user to delete transactions added to a payment batch that another user created.

**Work Clerical Queues Permission**

Use the Work Clerical Queues permission to specify whether users can work accounts in a clerical queue.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Data Entry** folder and then click **Work Clerical Queues**.

**Scope**

This permission is available for all scopes.

**Policy**

N/A

**Exchange Permissions and Policies**

**Modify Client Configuration Permission**

Use the Modify Client Configuration permission to specify whether users can modify configuration items for an Exchange Client.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Exchange** folder and then click **Modify Client Configuration**.

**Scope**

This permission is available for the following scopes:

- System
- Role
Use Exchange Permission

Use the Use Exchange permission to specify whether users can use Exchange.

Location

In the Latitude Permissions and Policies Editor window, expand the Exchange folder and then click Use Exchange.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Funnel Permissions and Policies

Custom Queue Builder Permission

Use the Custom Queue Builder permission to specify whether users can create a custom queue using the funnel.

Location

In the Latitude Permissions and Policies Editor window, expand the Funnel folder and then click Custom Queue Builder.

Scope

This permission is available for all scopes.

Policy

N/A

Desk Change Permission

Use the Desk Change permission to specify whether users can create desk changes using the funnel.

Location
In the Latitude Permissions and Policies Editor window, expand the Funnel folder and then click Desk Change.

**Scope**
This permission is available for all scopes.

**Policy**
N/A

**Letter Request Permission**
Use the Letter Request permission to specify whether users can create letter requests using the funnel.

**Location**
In the Latitude Permissions and Policies Editor window, expand the Funnel folder and then click Letter Request.

**Scope**
This permission is available for all scopes.

**Policy**
N/A

**Restrict by Custom Criteria Permission**
Use the Restrict by Custom Criteria permission to specify which custom criteria is available to users within the funnel.

**Location**
In the Latitude Permissions and Policies Editor window, expand the Funnel folder and then click Restrict by Custom Criteria.

**Scope**
This permission is available for all scopes.

**Policy**
N/A

**Status Change Permission**
Use the Status Change permission to specify whether users can create status changes using the funnel.

**Location**
In the Latitude Permissions and Policies Editor window, expand the Funnel folder and then click Status Change.

**Scope**
This permission is available for all scopes.

**Policy**
Latitude Management Suite Extension Wizard Permissions and Policies

Access SQL Tool Permission
Use the Access SQL Tool permission to specify whether users can use the Latitude Management Suite Extension Wizard.

Location
In the Latitude Permissions and Policies Editor window, expand the Latitude Management Suite Extension Wizard folder and then click Access SQL Tool.

Scope
This permission is available for all scopes.

Policy
N/A

Letters Permissions and Policies

Access Letter Console Permission
Use the Access Letter Console permission to specify whether users can use Letter Console.

Location
In the Latitude Permissions and Policies Editor window, expand the Letters folder and then click Access Letter Console.

Scope
This permission is available for all scopes.

Policy
N/A

Change Settings Permission
Use the Change Settings permission to specify whether users can modify letter settings in Letter Console.

Location
In the Latitude Permissions and Policies Editor window, expand the Letters folder and then click Change Settings.

Scope
This permission is available for all scopes.

Policy
N/A
Create\Delete (Letters) Permission

Use the Create\Delete permission to specify whether users can create and delete letters in Letter Console.

Location

In the Latitude Permissions and Policies Editor window, expand the Letters folder and then click Create\Delete.

Scope

This permission is available for all scopes.

Policy

N/A

Edit Letter Requests Permission

Use the Edit Letter Requests permission to specify whether users can open Microsoft Word from within Letter Console to create a letter template.

Location

In the Latitude Permissions and Policies Editor window, expand the Letters folder and then click Edit Letter Requests.

Scope

This permission is available for all scopes.

Policy

N/A

Email and Fax Debtor Letters Permission

Use the Email and Fax Debtor Letters permission to specify whether users can send letters in an email message. The system no longer allows you to fax letters.

Location

In the Latitude Permissions and Policies Editor window, expand the Letters folder and then click Email and Fax Debtor Letters.

Scope

This permission is available for all scopes.

Policy

N/A

Letter Requestor SQL Permission

Use the Letter Requestor SQL permission to specify whether users can use Letter Requester.

Location
In the **Latitude Permissions and Policies Editor** window, expand the **Letters** folder and then click **Letter Requestor SQL**.

**Scope**
This permission is available for all scopes.

**Policy**
N/A

**Merge Using Microsoft Word Permission**

Use the Merge Using Microsoft Word permission to specify whether users can use Microsoft Word to modify pending letters in Latitude and letter templates in Letter Console without having to download, edit, and then upload them. You must have Microsoft Word installed to use this feature. For more information about modifying pending letters, see Modify a Pending Letter Using Microsoft Word. For more information about modifying letter templates, see "Modify a Letter Template Using Microsoft Word" in the Letter Console documentation.

**Note:** If you disable this permission or don’t configure it, you must download the letter, customize it, and then upload it back to Latitude. For more information, see Customize a Pending Letter.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Letters** folder and then click **Merge Using Microsoft Word**.

**Scope**
This permission is available for the following scopes:

- System
- User
- Role
- Branch

**Policy**
N/A

**Print (Letters) Permission**

Use the Print permission to specify whether users can print letters using Letter Console.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Letters** folder and then click **Print**.

**Scope**
This permission is available for all scopes.

**Policy**
N/A
Request (Letters) Permission
Use the Request permission to specify whether users can request letters for an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Letters folder and then click Request.

Scope
This permission is available for all scopes.

Policy
N/A

SQL SIF Letter Requestor Permission
Use the SQL SIF Letter Requestor permission to specify whether users can create Settled in Full (SIF) letter requests using Letter Requester.

Location
In the Latitude Permissions and Policies Editor window, expand the Letters folder and then click SQL SIF Letter Requestor.

Scope
This permission is available for all scopes.

Policy
N/A

Main Menus Permissions and Policies

Apps Permission
Use the Apps permission to specify whether users can view the Apps menu.

Location
In the Latitude Permissions and Policies Editor window, expand the Main Menus folder and then click Apps.

Scope
This permission is available for all scopes.

Policy
N/A

Custom Permission
Use the Custom permission to specify whether users can view the Custom menu.

Location
In the Latitude Permissions and Policies Editor window, expand the Main Menus folder and then click Custom.

Scope
This permission is available for all scopes.

Policy
N/A

Data Entry Permission
Use the Data Entry permission to specify whether users can view the Data Entry menu.

Location
In the Latitude Permissions and Policies Editor window, expand the Main Menus folder and then click Data Entry.

Scope
This permission is available for all scopes.

Policy
N/A

File Permission
Use the File permission to specify whether users can view the File menu.

Location
In the Latitude Permissions and Policies Editor window, expand the Main Menus folder and then click File.

Scope
This permission is available for all scopes.

Policy
N/A

Maintenance Permission
Use the Maintenance permission to specify whether users can view the Maintenance menu.

Location
In the Latitude Permissions and Policies Editor window, expand the Main Menus folder and then click Maintenance.

Scope
This permission is available for all scopes.

Policy
Reports Permission
Use the Reports permission to specify whether users can view the Reports menu.

Location
In the Latitude Permissions and Policies Editor window, expand the Main Menus folder and then click Reports.

Scope
This permission is available for all scopes.

Policy
N/A

Tools Permission
Use the Tools permission to specify whether users can view the Tools menu.

Location
In the Latitude Permissions and Policies Editor window, expand the Main Menus folder and then click Tools.

Scope
This permission is available for all scopes.

Policy
N/A

Management Permissions and Policies

Access Portfolio Management Permission
Use the Access Portfolio Management permission to specify whether users can use Portfolio Manager.

Location
In the Latitude Permissions and Policies Editor window, expand the Management folder and then click Access Portfolio Management.

Scope
This permission is available for all scopes.

Policy
N/A

Account Linking Permission
Use the Account Linking permission to specify whether users can link accounts manually using the Link Accounts tool.
Location
In the Latitude Permissions and Policies Editor window, expand the Management folder and then click Account Linking.

Scope
This permission is available for all scopes.

Policy
N/A

Alter Restrictions Permission
Use the Alter Restrictions permission to specify whether users can set and clear restrictions on an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Management folder and then click Alter Restrictions.

Scope
This permission is available for all scopes.

Policy
N/A

Approve Credit Card Payments Permission
Use the Approve Credit Card Payments permission to specify whether users can approve credit card payments that the user or another user added.

Location
In the Latitude Permissions and Policies Editor window, expand the Management folder and then click Approve Credit Card Payments.

Scope
This permission is available for all scopes.

Policy
N/A

Audit Desks Permission
Use the Audit Desks permission to specify whether users can use the Supervisor Audit feature.

Location
In the Latitude Permissions and Policies Editor window, expand the Management folder and then click Audit Desks.

Scope
This permission is available for all scopes.

**Policy**
N/A

### Change Account Fee Schedule Permission

Use the Change Account Fee Schedule permission to specify whether users can change the fee schedule assigned to an account.

**Location**
In the Latitude Permissions and Policies Editor window, expand the Management folder and then click Change Account Fee Schedule.

**Scope**
This permission is available for all scopes.

**Policy**
N/A

### Close Account Permission

Use the Close Account permission to specify whether users can assign a closed status to an account.

**Location**
In the Latitude Permissions and Policies Editor window, expand the Management folder and then click Close Account.

**Scope**
This permission is available for all scopes.

**Policy**
N/A

### Create Custom Queues Permission

Use the Create Custom Queues permission to specify whether users can create a custom work queue.

**Location**
In the Latitude Permissions and Policies Editor window, expand the Management folder and then click Create Custom Queues.

**Scope**
This permission is available for all scopes.

**Policy**
N/A
Credit Reporting Wizard Permission
Use the Credit Reporting Wizard permission to specify whether users can use the Credit Reporting wizard to create a file to send to a credit bureau.

Location
In the Latitude Permissions and Policies Editor window, expand the Management folder and then click Credit Reporting Wizard.

Scope
This permission is available for all scopes.

Policy
N/A

Dolan Import\Export Utility Permission
Use the Dolan Import\Export Utility permission to specify whether users can use the Dolan Import/Export tool.

Location
In the Latitude Permissions and Policies Editor window, expand the Management folder and then click Dolan Import\Export Utility.

Scope
This permission is available for all scopes.

Policy
N/A

Manage Custom Queues Permission
Use the Manage Custom Queues permission to specify whether users can manage custom queues.

Location
In the Latitude Permissions and Policies Editor window, expand the Management folder and then click Manage Custom Queues.

Scope
This permission is available for all scopes.

Policy
N/A

Reassign Branch Permission
Use the Reassign Branch permission to specify whether users can reassign accounts assigned to a different branch other than their own branch.

Location
In the **Latitude Permissions and Policies Editor** window, expand the **Management** folder and then click **Reassign Branch**.

**Scope**

This permission is available for all scopes.

**Policy**

N/A

**Reassign Desk Permission**

Use the Reassign Desk permission to specify whether users can change the desk assigned to an account.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Management** folder and then click **Reassign Desk**.

**Scope**

This permission is available for all scopes.

**Policy**

This policy allows your organization to specify which desks users can move accounts to and from. Enable the permission for a scope and then specify the settings.

- **Restrict the desk from which the user may move the account:** If selected, the system limits the desks from which users can move accounts to the desks specified.
- **Restrict Desks:** Desk restriction.
- **Desks:** Desks from which users can move accounts.
- **Restrict the desk to which the user may move the account:** If selected, the system limits the desks to which users can move accounts to the desks specified.
- **Restrict Desks:** Desk restriction.
- **Desks:** Desks to which users can move accounts.

**Remove Other Users Batch Locks Permission**

Use the Remove Other Users Batch Locks permission to specify whether users can access batches that other users have open.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Management** folder and then click **Remove Other Users Batch Locks**.

**Scope**

This permission is available for the following scopes:

- System
• Role
• User
• Branch

Policy
N/A

Reopen Account Permission
Use the Reopen Account permission to specify whether users can assign a reopened status to a closed account.

Location
In the Latitude Permissions and Policies Editor window, expand the Management folder and then click Reopen Account.

Scope
This permission is available for all scopes.

Policy
N/A

Return Account Permission
Use the Return Account permission to specify whether users can change the account status to a returned queue level (999). Status Changer uses this permission when using the Return Accounts to Customer option.

Location
In the Latitude Permissions and Policies Editor window, expand the Management folder and then click Return Account.

Scope
This permission is available for all scopes.

Policy
N/A

Unreturn Account Permission
Use the Unreturn Account permission to specify whether users can change the account status from returned (999).

Location
In the Latitude Permissions and Policies Editor window, expand the Management folder and then click Unreturn Account.

Scope
This permission is available for all scopes.

**Policy**
N/A

**Use Account Mover Permission**
Use the Use Account Mover permission to specify whether users can use the Desk Mover tool.

**Location**
In the Latitude Permissions and Policies Editor window, expand the Management folder and then click Use Account Mover.

**Scope**
This permission is available for all scopes.

**Policy**
N/A

**Use SQL CBR Requester Permission**
Use the Use SQL CBR Requester permission to specify whether users can use CBR Requester.

**Location**
In the Latitude Permissions and Policies Editor window, expand the Management folder and then click Use SQL CBR Requester.

**Scope**
This permission is available for all scopes.

**Policy**
N/A

**Work Supervisor Queues Permission**
Use the Work Supervisor Queues permission to specify whether users can work accounts in supervisor queues.

**Location**
In the Latitude Permissions and Policies Editor window, expand the Management folder and then click Work Supervisor Queues.

**Scope**
This permission is available for all scopes.

**Policy**
N/A
Misc Permissions and Policies

Allow Edit of Desk on Payment History Permission
Use the Allow Edit of Desk on Payment History permission to specify whether users can change the assigned desk for a payment.

Location
In the Latitude Permissions and Policies Editor window, expand the Misc folder and then click Allow Edit of Desk on Payment History.

Scope
This permission is available for all scopes.

Policy
N/A

Allow Non-standard Action\Result Codes Permission
Use the Allow Non-standard Action\Result Codes permission to specify whether users can add an action or result code that is not in the list when creating a note.

Location
In the Latitude Permissions and Policies Editor window, expand the Misc folder and then click Allow Non-standard Action\Result Codes.

Scope
This permission is available for all scopes.

Policy
N/A

Can Choose Follow-up Dates Permission
Use the Can Choose Follow-up Dates permission to specify whether users can set a custom follow-up date.

Location
In the Latitude Permissions and Policies Editor window, expand the Misc folder and then click Can Choose Follow-up Dates.

Scope
This permission is available for all scopes.

Policy
N/A
Change Desk in Payment Summary Permission
Use the Change Desk in Payment Summary permission to specify whether users can change the desk assigned to a payment.

Location
In the Latitude Permissions and Policies Editor window, expand the Misc folder and then click Change Desk in Payment Summary.

Scope
This permission is available for all scopes.

Policy
N/A

Display State Warnings Permission
Use the Display State Warnings permission to specify whether to display state warnings for an account associated to a state with restrictions.

Location
In the Latitude Permissions and Policies Editor window, expand the Misc folder and then click Display State Warnings.

Scope
This permission is available for all scopes.

Policy
N/A

Display Time Zone Warnings Permission
Use the Display Time Zone Warnings permission to specify whether to display a warning when an account is open in the Work Form during a restricted period. The system calculates the time based on the debtor’s ZIP Code.

Location
In the Latitude Permissions and Policies Editor window, expand the Misc folder and then click Display Time Zone Warnings.

Scope
This permission is available for all scopes.

Policy
N/A

Get Server Time at Login Permission
Use the Get Server Time at Login permission to specify whether to synchronize the user’s workstation date and time stamp with the SQL server when the user logs on to Latitude.
Location
In the Latitude Permissions and Policies Editor window, expand the Misc folder and then click Get Server Time at Login.

Scope
This permission is available for all scopes.

Policy
N/A

Mass Fee Change Permission
Use the Mass Fee Change permission to specify whether users can use the Fee Change option (in the Tools menu) to change the fee code for multiple accounts.

Location
In the Latitude Permissions and Policies Editor window, expand the Misc folder and then click Mass Fee Change.

Scope
This permission is available for all scopes.

Policy
N/A

Require Note on Account Permission
Use the Require Note on Account permission to specify whether to require users to add a note to an account before moving to the next account when working a queue.

Location
In the Latitude Permissions and Policies Editor window, expand the Misc folder and then click Require Note on Account.

Scope
This permission is available for all scopes.

Policy
This policy allows you to specify whether to require users to add notes containing action or result codes that meet specific criteria before moving to the next account in the queue. Enable the permission for a scope and then specify the settings.

- **Require a note with an action or result code that is considered as worked**: If selected, the user cannot continue in the queue until adding a note with an action or result code indicating that the user worked the account.

- **Require a note with an action code that is considered as attempted**: If selected, the user cannot continue in the queue until adding a note with an action code indicating that the user attempted to contact the account.
See System Notes Permission
Use the See System Notes permission to specify whether users can view account notes that system processes create.

Location
In the Latitude Permissions and Policies Editor window, expand the Misc folder and then click See System Notes.

Scope
This permission is available for all scopes.

Policy
N/A

Show My Payments Permission
Use the Show My Payments permission to specify whether users can use the Show My Payments option.

Location
In the Latitude Permissions and Policies Editor window, expand the Misc folder and then click Show My Payments.

Scope
This permission is available for all scopes.

Policy
N/A

View All Notes by Default Permission
Use the View All Notes by Default permission to specify whether to display all notes when users first display an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Misc folder and then click View All Notes by Default.

Scope
This permission is available for all scopes.

Policy
N/A

View Fees Permission
Use the View Fees permission to specify whether users can view projected fee information.

Location
In the Latitude Permissions and Policies Editor window, expand the Misc folder and then click View Fees.

Scope
This permission is available for all scopes.

Policy
N/A

View Other Desk Payments Permission
Use the View Other Desk Payments permission to specify whether users can view payments that another desk added.

Location
In the Latitude Permissions and Policies Editor window, expand the Misc folder and then click View Other Desk Payments.

Scope
This permission is available for all scopes.

Policy
N/A

View Payment Details Permission
Use the View Payment Details permission to specify whether users can view payment detail information.

Location
In the Latitude Permissions and Policies Editor window, expand the Misc folder and then click View Payment Details.

Scope
This permission is available for all scopes.

Policy
N/A

Payment Processing Permissions and Policies

Access Batch Wizard Permission
Use the Access Batch Wizard permission to specify whether users can use the Vendor Payment Batch Wizard.

Location
In the Latitude Permissions and Policies Editor window, expand the Payment Processing folder and then click Access Batch Wizard.

Scope
This permission is available for the following scopes:

- System
- Role
- User
- Branch

**Policy**

This policy allows your organization to specify whether users can select future due dates when pre-posting payments. Enable the permission for a scope and then specify the settings.

- **Allow to select future Due dates for pre posting of payments**: If selected, the system includes transactions with a due date greater than the current date in vendor transaction batches created using the Vendor Payment Batch Wizard.

**ACH Vendor Information Permission**

Use the ACH Vendor Information permission to specify the vendor for ACH processing using Payment Vendor Gateway.

**Location**

In the Latitude Permissions and Policies Editor window, expand the Payment Processing folder and then click ACH Vendor Information.

**Scope**

This permission is available for the following scopes:

- System
- Business Class
- Customer Group
- Customer

**Policy**

This policy allows your organization to specify tokenization for vendor ACH processing using Payment Vendor Gateway. Enable the permission for a scope and then specify the settings.

- **Vendor Info Parameter 1** and **Vendor Info Parameter 2**: Codes the vendor provided for your account and codes to apply to all ACH transactions for the selected level, unless you set up surcharges separately.
- **Send the surcharge as a separate transaction?**: If selected, the system sends surcharges as separate transactions. Specify the vendor surcharge parameters.
- **Vendor Surcharge Info Parameter 1** and **Vendor Surcharge Info Parameter 2**: Codes the vendor provided for your account and codes to apply to all ACH surcharges for the selected level.

**Note:** To charge a surcharge to a separate trust account, select the **Send the surcharge as a separate transaction?** check box and then configure the following:
Credit Card Vendor Information Permission

Use the Credit Card Vendor Information permission to specify the vendor for credit card processing using Payment Vendor Gateway.

Location

In the Latitude Permissions and Policies Editor window, expand the Payment Processing folder and then click Credit Card Vendor Information.

Scope

This permission is available for the following scopes:

- System
- Business Class
- Customer Group
- Customer

Policy

This policy allows your organization to specify tokenization for vendor credit card processing using Payment Vendor Gateway. Enable the permission for a scope and then specify the settings.

- **Vendor Info Parameter 1** and **Vendor Info Parameter 2**: Codes the vendor provided for your account and codes to apply to all credit card transactions for the selected level, unless you set up surcharges separately.

- **Send the surcharge as a separate transaction?**: If selected, the system sends surcharges as separate transactions. Specify the vendor surcharge parameters.

- **Vendor Surcharge Info Parameter 1** and **Vendor Surcharge Info Parameter 2**: Codes the vendor provided for your account and codes to apply to all credit card surcharges for the selected level.

**Note:** To charge a surcharge to a separate trust account, select the **Send the surcharge as a separate transaction?** check box and configure the following:

- **Vendor Info Parameter 1** = 
  securityToken=<principalValue>|securityTokenSurcharge=<surchargePINValue>|mode=principal

- **Vendor Info Parameter 2** = 
  pin=<principalPINValue>|pinSurcharge=<surchargePINValue>

- **Vendor Surcharge Info Parameter 1** = 
  securityToken=<surchargeValue>|mode=surcharge

- **Vendor Surcharge Info Parameter 2** = 
  pin=<surchargePINValue>
Debtor Information Profiles Permission

Use the Debtor Information Profiles permission to specify the debtor information profiles for Payment Vendor Gateway.

Location

In the Latitude Permissions and Policies Editor window, expand the Payment Processing folder and then click Debtor Information Profiles.

Scope

This permission is available for the System scope only.

Policy

This policy allows your organization to specify debtor information profiles settings for Payment Vendor Gateway. Enable the permission for a scope and then specify the settings.

- Select the Debtor Information Profiles for Real Time and Batch Credit Card Processing: Profile to use for processing real-time and batch credit card payments.
- Select the Debtor Information Profiles for Batch ACH Processing: Profile to use for processing batch ACH payments.
- Select the Debtor Information Profiles for Batch Paper Draft Processing: Profile to use for processing batch paper draft payments.

Enable Latitude Payment Vendor Gateway Permission

Use the Enable Latitude Payment Vendor Gateway permission to specify whether users can use the Payment Vendor Gateway for sending transactions through the Vendor Payment Batch Wizard.

Location

In the Latitude Permissions and Policies Editor window, expand the Payment Processing folder and then click Enable Latitude Payment Vendor Gateway.

Scope

This permission is available for the following scopes:

- System
- Business Class
- Customer Group
- Customer

Policy
This policy allows your organization to specify Payment Vendor Gateway settings. Enable the permission for a scope and then specify the settings.

- **URL for Latitude Payment Vendor Gateway**: URL for Payment Vendor Gateway. The default value points to an IIS server that Latitude uses (primarily for hosted clients). If you are not using Latitude in a hosted environment, set up an IIS server to host the service.

- **Select the Vendor for Batch and Real Time Credit Card Processing**: Default vendor your organization uses for credit card processing. The system requires other parameter settings in the [Credit Card Vendor Information permission](#).

- **Select the Vendor for Batch ACH Processing**: Default vendor your organization uses for ACH processing. The system requires other parameter settings in the [ACH Vendor Information permission](#).

- **Select the Vendor for Batch Paper Draft Processing**: Default vendor your organization uses for paper draft processing. The system requires other parameter settings in the [Paper Draft Vendor Information permission](#).

**Paper Draft Vendor Information Permission**

Use the Paper Draft Vendor Information permission to specify the vendor for paper draft processing using Payment Vendor Gateway.

**Location**

In the [Latitude Permissions and Policies Editor](#) window, expand the [Payment Processing](#) folder and then click [Paper Draft Vendor Information](#).

**Scope**

This permission is available for the following scopes:

- System
- Business Class
- Customer Group
- Customer

**Policy**

This policy allows your organization to specify tokenization for vendor paper draft processing using Payment Vendor Gateway. Enable the permission for a scope and then specify the settings.

- **Vendor Info Parameter 1** and **Vendor Info Parameter 2**: Codes the vendor provided for your account and codes to apply to all paper draft transactions for the selected level, unless you set up surcharges separately.

- **Send the surcharge as a separate transaction?**: If selected, the system sends surcharges as separate transactions. Specify the vendor surcharge parameters.

- **Vendor Surcharge Info Parameter 1** and **Vendor Surcharge Info Parameter 2**: Codes the vendor provided for your account and codes to apply to all paper draft surcharges for the selected level.
Note: To charge a surcharge to a separate trust account, select the Send the surcharge as a separate transaction? check box and configure the following:

- **Vendor Info Parameter 1** = securityToken=<principalValue>|securityTokenSurcharge=<surchargePINValue>|mode=principal
- **Vendor Info Parameter 2** = pin=<principalPINValue>|pinSurcharge=<surchargePINValue>
- **Vendor Surcharge Info Parameter 1** = securityToken=<surchargeValue>|mode=surcharge
- **Vendor Surcharge Info Parameter 2** = pin=<surchargePINValue>

Replace the text within the less than and greater than signs (<>) with the appropriate values.

### PDCs Permissions and Policies

#### Alter PDCs Permission

Use the Alter PDCs permission to specify whether users can modify post-dated check terms created for a debtor account.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **PDCs** folder and then click **Alter PDCs**.

**Scope**

This permission is available for all scopes.

**Policy**

N/A

#### Approve Other User PDCs Permission

Use the Approve Other User PDCs permission to specify whether users can approve post-dated check terms for an account that another user created.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **PDCs** folder and then click **Approve Other User PDCs**.

**Scope**

This permission is available for all scopes.

**Policy**

N/A

#### Approve Own PDCs Permission

Use the Approve Own PDCs permission to specify whether users can approve post-dated check terms for an account that they created.
Location
In the Latitude Permissions and Policies Editor window, expand the PDCs folder and then click Approve Own PDCs.

Scope
This permission is available for all scopes.

Policy
N/A

Create PDCs Permission
Use the Create PDCs permission to specify whether users can create post-dated check terms for an account.

Location
In the Latitude Permissions and Policies Editor window, expand the PDCs folder and then click Create PDCs.

Scope
This permission is available for all scopes.

Policy
This policy allows your organization to specify the business rules to enforce when a user adds post-dated payments. Enable the permission for a scope and then specify the settings.

Note: If using the Override Rules option, the system applies the supervisor's rules for the current promise instead of the current user's rules. This override does not mean that the system applies no rules, but rather the supervisor's rules are in effect.

- User is not required to observe customer business rules: If selected, post-date settings applied to a user, role, or desk scope take precedence over settings applied for a customer or customer group scope (system doesn't enforce customer policies).

The following settings apply for the first PDC item in a series:

- Minimum Check Amount and Minimum Balance Percent: Minimum amount for the post-date. Express this value as a specific monetary amount or as a percentage of the current balance of the account. The system requires the higher of the two values for the first item. If the current balance of the account is less than this amount, the current payment equals the balance.

- Maximum Days to Deposit: Number of days into the future that a user can post-date the first payment.

- Maximum Checks: Maximum number of payments by check (up to 250) that a user can include in the series.

Note: If you are upgrading to Latitude 10.0 SU 8, ensure that this value is greater than 0 (zero) or you cannot create a payment arrangement.
• **Minimum Subsequent Check Amount**: Minimum amount for subsequent payments. Express this value as a specific monetary amount. If the current balance of the account minus the value of the other items is less than this amount, the payment is equal to the minimum amount.

• **Maximum Days between Checks**: Maximum number of days between payments in the series.

• **Maximum Days to Last Check**: Maximum number of days into the future from the current date that a user can create the last payment in the series.

• **Minimum Arrangement Amount**: Minimum total amount of all post-dated checks included in a single arrangement. If the arrangement a user is adding results in a paid in full or settled in full account, this setting does not apply.

• **Allow user to enter settlement arrangement for less than the customer blanket settlement**: If selected, the system doesn't require a user to meet blanket settlement percentage requirements (indicated in **Customer Properties – Fees** tab) when creating a settlement promise amount.

• **Payment Methods**: Post-dated payment types available for selection for the specified scope.

**Delete PDCS Permission**

Use the Delete PDCS permission to specify whether users can delete post-dated check terms from an account.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **PDCs** folder and then click **Delete PDCS**.

**Scope**

This permission is available for all scopes.

**Policy**

N/A

**Enter Check Information Permission**

Use the Enter Check Information permission to specify whether users can provide checking or savings account information for payments in a payment arrangement. For more information, see **Specify Checking or Savings Account Information**.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **PDCs** folder and then click **Enter Check Information**.

**Scope**

This permission is available for all scopes.

**Policy**

N/A
Enter New ACH Debits Permission

Use the Enter New ACH Debits permission to specify whether users can add post-dated checks when using the ACH debit payment method.

Location

In the Latitude Permissions and Policies Editor window, expand the PDCs folder and then click Enter New ACH Debits.

Scope

This permission is available for all scopes.

Policy

N/A

Enter New Paper Drafts Permission

Use the Enter New Paper Drafts permission to specify whether users can add post-dated checks when using the paper draft payment method.

Location

In the Latitude Permissions and Policies Editor window, expand the PDCs folder and then click Enter New Paper Drafts.

Scope

This permission is available for all scopes.

Policy

N/A

Enter New Post-dated Checks Permission

Use the Enter New Post-dated Checks permission to specify whether users can add terms for post-dated check payments for an account. If selected, the PDC option is available when creating post-dated payments.

Location

In the Latitude Permissions and Policies Editor window, expand the PDCs folder and then click Enter New Post-dated Checks.

Scope

This permission is available for all scopes.

Policy

N/A

Place PDC on Hold Permission

Use the Place PDC on Hold permission to specify whether users can place on hold the post-dated check terms for an account.
Location

In the Latitude Permissions and Policies Editor window, expand the PDCs folder and then click Place PDC on Hold.

Scope

This permission is available for all scopes.

Policy

N/A

Remove PDC Hold Permission

Use the Remove PDC Hold permission to specify whether users can remove the hold on post-dated check terms for an account.

Location

In the Latitude Permissions and Policies Editor window, expand the PDCs folder and then click Remove PDC Hold.

Scope

This permission is available for all scopes.

Policy

N/A

Surcharge Options Permission (PDCs)

Use the Surcharge Options permission to specify whether users can modify the surcharge settings for post-dated checks.

Location

In the Latitude Permissions and Policies Editor window, expand the PDCs folder and then click Surcharge Options.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Business Class
- Customer Group
- Customer
This policy allows your organization to specify whether users can modify the surcharge for post-dated check payment arrangements. Enable the permission for a scope and then specify the settings.

- **Allow zero surcharge**: If selected, allows the user to exclude surcharges for all payments in a payment arrangement.
- **Allow manually entered surcharge amount**: If selected, allows the user to specify a surcharge amount to apply to each payment in a payment arrangement.
- **Surcharge Type**: Surcharge types available to the user. You can use the search box to locate a specific surcharge within your system.

**View Other User PDCs Permission**

Use the View Other User PDCs permission to specify whether users can view post-dated checks that other users created.

**Location**

In the Latitude Permissions and Policies Editor window, expand the PDCs folder and then click View Other User PDCs.

**Scope**

This permission is available for all scopes.

**Policy**

N/A

**View PDCs Permission**

Use the View PDCs permission to specify whether users can view post-dated check terms for an account.

**Location**

In the Latitude Permissions and Policies Editor window, expand the PDCs folder and then click View PDCs.

**Scope**

This permission is available for all scopes.

**Policy**

N/A

**Portfolio Manager Permissions and Policies**

**Access Reports Permission**

Use the Access Reports permission to specify whether users can view reports in Portfolio Manager.

**Location**

In the Latitude Permissions and Policies Editor window, expand the Portfolio Manager folder and then click Access Reports.
Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Access Tools Permission

Use the Access Tools permission to specify whether users can use the tools in Portfolio Manager.

Location

In the Latitude Permissions and Policies Editor window, expand the Portfolio Manager folder and then click Access Tools.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Add\Edit\Delete Buyers Permission

Use the Add\Edit\Delete Buyers permission to specify whether users can add, modify, and delete buyers in Portfolio Manager.

Location

In the Latitude Permissions and Policies Editor window, expand the Portfolio Manager folder and then click Add\Edit\Delete Buyers.

Scope

This permission is available for the following scopes:

- System
- Role
- User
Add\Edit\Delete Investors Permission
Use the Add\Edit\Delete Investors permission to specify whether users can add, modify, and delete investors in Portfolio Manager.

Location
In the Latitude Permissions and Policies Editor window, expand the Portfolio Manager folder and then click Add\Edit\Delete Investors.

Scope
This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy
N/A

Add\Edit\Delete Purchases Permission
Use the Add\Edit\Delete Purchases permission to specify whether users can add, modify, and delete purchases in Portfolio Manager.

Location
In the Latitude Permissions and Policies Editor window, expand the Portfolio Manager folder and then click Add\Edit\Delete Purchases.

Scope
This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy
N/A
Add/Edit/Delete Sales Permission

Use the Add/Edit/Delete Sales permission to specify whether users can add, modify, and delete sales in Portfolio Manager.

Location

In the Latitude Permissions and Policies Editor window, expand the Portfolio Manager folder and then click Add/Edit/Delete Sales.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Add/Edit/Delete Samples Permission

Use the Add/Edit/Delete Samples permission to specify whether users can add, modify, and delete samples in Portfolio Manager.

Location

In the Latitude Permissions and Policies Editor window, expand the Portfolio Manager folder and then click Add/Edit/Delete Samples.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Add/Edit/Delete Sellers Permission

Use the Add/Edit/Delete Sellers permission to specify whether users can add, modify, and delete sellers in Portfolio Manager.

Location
In the **Latitude Permissions and Policies Editor** window, expand the **Portfolio Manager** folder and then click **Add\Edit\Delete Sellers**.

**Scope**

This permission is available for the following scopes:

- System
- Role
- User
- Branch

**Policy**

N/A

**View Buyers Permission**

Use the View Buyers permission to specify whether users can view buyers in Portfolio Manager.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Portfolio Manager** folder and then click **View Buyers**.

**Scope**

This permission is available for the following scopes:

- System
- Role
- User
- Branch

**Policy**

N/A

**View Investors Permission**

Use the View Investors permission to specify whether users can view investors in Portfolio Manager.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Portfolio Manager** folder and then click **View Investors**.

**Scope**

This permission is available for the following scopes:

- System
- Role
View Purchases Permission
Use the View Purchases permission to specify whether users can view purchases in Portfolio Manager.

Location
In the Latitude Permissions and Policies Editor window, expand the Portfolio Manager folder and then click View Purchases.

Scope
This permission is available for the following scopes:
- System
- Role
- User
- Branch

Policy
N/A

View Sales Permission
Use the View Sales permission to specify whether users can view sales in Portfolio Manager.

Location
In the Latitude Permissions and Policies Editor window, expand the Portfolio Manager folder and then click View Sales.

Scope
This permission is available for the following scopes:
- System
- Role
- User
- Branch

Policy
N/A

View Samples Permission
Use the View Samples permission to specify whether users can view samples in Portfolio Manager.
Location
In the Latitude Permissions and Policies Editor window, expand the Portfolio Manager folder and then click View Samples.

Scope
This permission is available for the following scopes:
- System
- Role
- User
- Branch

Policy
N/A

View Sellers Permission
Use the View Sellers permission to specify whether users can view sellers in Portfolio Manager.

Location
In the Latitude Permissions and Policies Editor window, expand the Portfolio Manager folder and then click View Sellers.

Scope
This permission is available for the following scopes:
- System
- Role
- User
- Branch

Policy
N/A

Promises Permissions and Policies

Add Multi-part Settlements Permission
Use the Add Multi-part Settlements permission to specify whether users can create multi-part settlement promises for an account.

Location
In the Latitude Permissions and Policies Editor window, expand the Promises folder and then click Add Multi-part Settlements.

Scope
This permission is available for all scopes.

**Policy**
This policy allows your organization to specify multi-part settlements for accounts. Enable the permission for a scope and then specify the setting.

- **Maximum Parts:** Maximum number of parts a settlement can have for an account.

**Allow View Debtor Checking Acct Number Permission**
Use the Allow View Debtor Checking Acct Number permission to specify whether users can view a debtor’s checking account number. If disabled, the account number appears as asterisks (****).

**Location**
In the **Latitude Permissions and Policies Editor** window, expand the **Promises** folder and then click **Allow View Debtor Checking Acct Number**.

**Scope**
This permission is available for all scopes.

**Policy**
N/A

**Alter Other Desk Promises Permission**
Use the Alter Other Desk Promises permission to specify whether users can modify or create promise agreements assigned to other desks.

**Location**
In the **Latitude Permissions and Policies Editor** window, expand the **Promises** folder and then click **Alter Other Desk Promises**.

**Scope**
This permission is available for all scopes.

**Policy**
N/A

**Approve PPA Permission**
Use the Approve PPA permission to specify whether users can approve promise terms for an account.

**Location**
In the **Latitude Permissions and Policies Editor** window, expand the **Promises** folder and then click **Approve PPA**.

**Scope**
This permission is available for all scopes.

**Policy**
Can Change Reminder Days Permission

Use the Can Change Reminder Days permission to specify whether users can modify the number of days before the promise due date to send a reminder letter. The default number of days is 10.

Location

In the Latitude Permissions and Policies Editor window, expand the Promises folder and then click Can Change Reminder Days.

Scope

This permission is available for all scopes.

Policy

N/A

Create Promises Permission

Use the Create Promises permission to specify whether users can create promise terms for an account.

Location

In the Latitude Permissions and Policies Editor window, expand the Promises folder and then click Create Promises.

Scope

This permission is available for all scopes.

Policy

This policy allows your organization to specify the business rules to enforce when a user adds a payment promise. Enable the permission for a scope and then specify the settings.

Note: If using the Override Rules option, the system applies the supervisor's rules for the current promise instead of the current user's rules. This override does not mean that the system applies no rules, but rather the supervisor's rules are in effect.

- **User is not required to observe customer business rules:** If selected, promise settings applied to a user, role, or desk scope take precedence over settings applied for a customer or customer group scope (system doesn't enforce customer policies).

  The following settings apply for the first PDC item in a series:

- **Minimum Promise Amount** and **Minimum Balance Percent:** Minimum amount for the promise. Express this value as a specific monetary amount or as a percentage of the current balance of the account. The system requires the higher of the two values for the first item. If the current balance of the account is less than this amount, the current payment equals the balance.

- **Maximum Days to Promise:** Number of days into the future that a user can date the first promise.
• **Maximum Promises**: Maximum number of promises (up to 250) that a user can include in the series.

  **Note**: If you are upgrading to Latitude 10.0 SU 8, ensure that this value is greater than 0 (zero) or you cannot create a payment arrangement.

• **Minimum Additional Promise Amount**: Minimum amount for other payments. Express this value as a specific monetary amount. If the current balance of the account minus the value of the other items is less than this amount, that payment equals the minimum amount.

• **Maximum Days between Promises**: Maximum number of days between promises in the series.

• **Maximum Days to Last Promise**: Maximum number of days into the future from the current date that a user can create the last promise in the series.

• **Minimum Arrangement Amount**: Minimum total amount of all promises in a single arrangement. If the arrangement the user is adding results in a paid in full or settled in full account, this setting does not apply.

• **Allow user to enter a settlement arrangement for less than the customer blanket settlement percentage, if one applies**: If selected, the system doesn't require the user to meet blanket settlement percentage requirements (indicated in Customer Properties – Fees tab) when creating a settlement promise amount.

**Delete Promises Permission**

Use the Delete Promises permission to specify whether users can delete promises from an account.

**Location**

In the Latitude Permissions and Policies Editor window, expand the Promises folder and then click Delete Promises.

**Scope**

This permission is available for all scopes.

**Policy**

N/A

**Query Builder Permissions and Policies**

**Override Return Row Limit Permission**

Use the Override Return Row Limit permission to specify whether users can modify the maximum records returned when using the Query Builder tool.

**Location**

In the Latitude Permissions and Policies Editor window, expand the Query Builder folder and then click Override Return Row Limit.

**Scope**

This permission is available for all scopes.
Policy
N/A

Reports Permissions and Policies

Reporting Console Permissions and Policies

Access Reporting Console Permission

Use the Access Reporting Console permission to specify whether users can use Reporting Console.

Location

In the Latitude Permissions and Policies Editor window, expand the Reports folder, expand the Reporting Console folder, and then click Access Reporting Console.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Manage Reporting Console Permission

Use the Manage Reporting Console permission to specify whether users can export reports, import new reports, and replace existing reports in Reporting Console. It also allows you to specify whether the user can delete reports, create folders, move reports, and rename reports.

Location

In the Latitude Permissions and Policies Editor window, expand the Reports folder, expand the Reporting Console folder, and then click Manage Reporting Console.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A
**View Reports Permission**

Use the View Reports permission to specify whether users can view a report in Reporting Console.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the Reports folder, expand the Reporting Console folder, and then click **View Reports**.

**Scope**

This permission is available for the following scopes:

- System
- Role
- User
- Branch

**Policy**

This policy allows your organization to specify what users can do in Reporting Console. Enable the permission for a scope and then specify the settings.

- **Permit the user to create snapshots of reports they have run**: If selected, the user can create snapshots of reports that the user generated.
- **Permit the user to view snapshots of reports created by other users**: If selected, the user can view snapshots of reports that other users generated.
- **Restrict user to only execute the following reports**: If selected, the user can run the specified reports only.
- **Reports**: Reports available for the user to run.

**Access Statistics Console Permission**

Use the Access Statistics Console permission to specify whether users can use Statistics Console.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the Reports folder and then click **Access Statistics Console**.

**Scope**

This permission is available for all scopes.

**Policy**

N/A

**Batch Performance Permission**

Use the Batch Performance permission to specify whether users can run the **Batch Performance** report in Statistics Console.
Location
In the Latitude Permissions and Policies Editor window, expand the Reports folder and then click Batch Performance.

Scope
This permission is available for all scopes.

Policy
N/A

Batch Performance (Internal) Permission
Use the Batch Performance (Internal) permission to specify whether users can run the Internal Batch Performance report in Statistics Console.

Location
In the Latitude Permissions and Policies Editor window, expand the Reports folder and then click Batch Performance (Internal).

Scope
This permission is available for all scopes.

Policy
N/A

Collector Commissions Permission
Use the Collector Commissions permission to specify whether users can run the Collector Commissions report in Statistics Console.

Location
In the Latitude Permissions and Policies Editor window, expand the Reports folder and then click Collector Commissions.

Scope
This permission is available for all scopes.

Policy
N/A

Collector Commissions by Customer Permission
Use the Collector Commissions by Customer permission to specify whether users can run the Collector Commissions by Customer report in Statistics Console.

Location
In the Latitude Permissions and Policies Editor window, expand the Reports folder and then click Collector Commissions by Customer.
Latitude Printable Help for Administrators

**Scope**
This permission is available for all scopes.

**Policy**
N/A

**Credit Card Report Permission**
Use the Credit Card Report permission to specify whether users can run the **Credit Card** report in Statistics Console.

**Location**
In the **Latitude Permissions and Policies Editor** window, expand the **Reports** folder and then click **Credit Card Report**.

**Scope**
This permission is available for all scopes.

**Policy**
N/A

**Customer Collections Permission**
Use the Customer Collections permission to specify whether users can run the **Customer Collections** report in Statistics Console.

**Location**
In the **Latitude Permissions and Policies Editor** window, expand the **Reports** folder and then click **Customer Collections**.

**Scope**
This permission is available for all scopes.

**Policy**
N/A

**Customer Collections by Branch Permission**
Use the Customer Collections by Branch permission to specify whether users can run the **Customer Collections by Branch** report in Statistics Console.

**Location**
In the **Latitude Permissions and Policies Editor** window, expand the **Reports** folder and then click **Customer Collections by Branch**.

**Scope**
This permission is available for all scopes.

**Policy**
Desk Collections Permission
Use the Desk Collections permission to specify whether users can run the Desk Collections report in Statistics Console.

Location
In the Latitude Permissions and Policies Editor window, expand the Reports folder and then click Desk Collections.

Scope
This permission is available for all scopes.

Policy
N/A

PDC Report Permission
Use the PDC Report permission to specify whether users can run the PDC report in Statistics Console.

Location
In the Latitude Permissions and Policies Editor window, expand the Reports folder and then click PDC Report.

Scope
This permission is available for all scopes.

Policy
N/A

Promise Report Permission
Use the Promise Report permission to specify whether users can run the Promise report in Statistics Console.

Location
In the Latitude Permissions and Policies Editor window, expand the Reports folder and then click Promise Report.

Scope
This permission is available for all scopes.

Policy
N/A

StairStep Report Permission
Use the StairStep Report permission to specify whether users can run the StairStep report in Statistics Console.
Location
In the **Latitude Permissions and Policies Editor** window, expand the **Reports** folder and then click **StairStep Report**.

Scope
This permission is available for all scopes.

Policy
N/A

**StairStep Report with Projected PDCs Permission**

Use the StairStep Report with Projected PDCs permission to specify whether users can run the **StairStep Report with Projected PDCs** in Statistics Console.

Location
In the **Latitude Permissions and Policies Editor** window, expand the **Reports** folder and then click **StairStep Report with Projected PDCs**.

Scope
This permission is available for all scopes.

Policy
N/A

**Yield Analysis Permission**

Use the Yield Analysis permission to specify whether users can run the **Yield Analysis** report in Statistics Console.

Location
In the **Latitude Permissions and Policies Editor** window, expand the **Reports** folder and then click **Yield Analysis**.

Scope
This permission is available for all scopes.

Policy
N/A

**Security Permissions and Policies**

**Account Lock Out Policy Permission**

Use the Account Lock Out Policy permission to specify the number of times a user can attempt to log on to Latitude using an incorrect password before the system locks the user account.

Location
In the Latitude Permissions and Policies Editor window, expand the Security folder and then click Account Lock Out Policy.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

This policy allows your organization to specify criteria for unsuccessful logon attempts. Enable the permission for a scope and then specify the settings.

- **Maximum unsuccessful attempts**: Number of unsuccessful attempts to log on to allow before locking the user account.
- **Duration of account lockout (min)**: Number of minutes the system locks the user account after reaching the specified number of unsuccessful attempts to log on.

**Note**: System administrators can unlock a user account in Users - Roles.

Password Complexity Policy Permission

Use the Password Complexity Policy permission to specify password complexity requirements.

Location

In the Latitude Permissions and Policies Editor window, expand the Security folder and then click Password Complexity Policy.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

This policy allows your organization to specify requirements for creating passwords. Enable the permission for a scope and then specify the settings.

- **Minimum characters**: Minimum number of characters required for the password.
- **Minimum character classes**: Minimum number of character types required for the password (for example, alpha, numeric, uppercase, lowercase, control characters).
Password Expiration Policy Permission

Use the Password Expiration Policy permission to specify the minimum and maximum password age allowed.

Location

In the Latitude Permissions and Policies Editor window, expand the Security folder and then click Password Expiration Policy.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

This policy allows your organization to specify password expiration criteria. Enable the permission for a scope and then specify the settings.

- **Maximum password age [days]**: Maximum number of days since the last password change until the password expires.
- **Minimum password age [days]**: Minimum number of days since the last password change until the password expires.
- **Enforce password history**: Number of password changes to require before a user can reuse a previous password.

Service Request Gateway Permissions and Policies

Credit Report Requests Permissions and Policies

Access the Credit Report Request Wizard Permission

Use the Access the Credit Report Request Wizard permission to specify whether users can run the Credit Report Request Wizard from the Work Form.

Location

In the Latitude Permissions and Policies Editor window, expand the Service Request Gateway folder, expand the Credit Report Requests folder, and then click Access the Credit Report Request Wizard.

Scope

This permission is available for the following scopes:

- System
- Role
- User
• Branch

Policy

N/A

Allow Viewing of Credit Reports Permission

Use the Allow Viewing of Credit Reports permission to specify whether users can view credit reports from the Work Form.

Location

In the Latitude Permissions and Policies Editor window, expand the Service Request Gateway folder, expand the Credit Report Requests folder, and then click Allow Viewing of Credit Reports.

Scope

This permission is available for the following scopes:

• System
• Role
• User
• Branch
• Business Class
• Customer Group
• Customer

Policy

N/A

Credit Report Requests Settings Permission

Use the Credit Report Requests Settings permission to configure general settings for credit report requests. These settings apply to requests generated from the Work Form. Enable the permission for a scope and then specify the settings.

Location

In the Latitude Permissions and Policies Editor window, expand the Service Request Gateway folder, expand the Credit Report Requests folder, and then click Credit Report Requests Settings.

Scope

This permission is available for the System scope only.

Policy

This policy allows your organization to specify general settings for credit report requests. Enable the permission for a scope and then specify the settings.
• "One Off" time out period in seconds before users is prompted to wait or continue working: Number of seconds to wait after requesting a report before prompting the user to wait or continue working.

• Minimum number of days that must pass before next credit report request on an account: Minimum number of days after requesting a credit report to wait before allowing the user to request another report.

• Apply "minimum number of days" policy only to credit reports from same vendor: If selected, the system applies the "minimum number of days" policy to credit reports from the same vendor only.

• Minimum balance on account to request credit report: Minimum account balance required to request a credit report.

• Maximum number of credit report requests per account: Maximum number of credit report requests allowed per account.

Enable "One Off" Credit Report Requests Permission

Use the Enable "One Off" Credit Report Requests permission to specify whether users can request a credit report from the Work Form.

Location

In the Latitude Permissions and Policies Editor window, expand the Service Request Gateway folder, expand the Credit Report Requests folder, and then click Enable "One Off" Credit Report Requests.

Scope

This permission is available for the following scopes:

• System
• Role
• User
• Branch
• Business Class
• Customer Group
• Customer

Policy

N/A

Enable Overrides to Credit Report Request Settings Permission

Use the Enable Overrides to Credit Report Request Settings permission to specify whether users can override settings for credit report requests.

Location
In the **Latitude Permissions and Policies Editor** window, expand the **Service Request Gateway** folder, expand the **Credit Report Requests** folder, and then click **Enable Overrides to Credit Report Request Settings**.

**Scope**
This permission is available for the following scopes:

- System
- Role
- User
- Branch

**Policy**
This policy allows your organization to override the general settings for credit report requests. Enable the permission for a scope and then specify the settings.

- **Override minimum number of days that must pass before next credit report request on an account**: If selected, allows the user to override the minimum number of days after requesting a credit report to wait before allowing the user to request another report.
- **Override minimum balance on account to request credit report**: If selected, allows the user to override the minimum account balance required for the user to request a credit report.
- **Override maximum number of credit report requests per account**: If selected, allows the user to override the maximum number of credit report requests allowed per account.

**Access Quota Management Application Permission**
Use the Access Quota Management Application permission to specify whether users can use the Quota Management tool.

**Location**
In the **Latitude Permissions and Policies Editor** window, expand the **Service Request Gateway** folder, expand the **Quota Management** folder, and then click **Access Quota Management Application**.

**Scope**
This permission is available for the following scopes:

- System
- Role
- User
- Branch

**Policy**
**Access Quota Management Application**
This policy allows your organization to specify the settings for the Quota Management tool. Enable the permission for a scope and then specify the settings.
• **Allow the user to temporarily add to or remove from a user's quota allotment for any product. Only valid for current period.** If selected, allows the user to change the user's quota allotment for any product for the current time period.

• **Allow the user to temporarily add to or removed from a customer's quota allotment for any product. Only valid for current period.** If selected, allows the user to change a customer's quota allotment for any product for the current time period.

• **Allow the user to view the audit changes to quota allotments:** If selected, allows the user to view changes to quota allotments.

**Access SRG Module Installer Permission**

Use the Access SRG Module Installer permission to specify whether users can run the SRG Module Installer.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Service Request Gateway** folder and then click **Access SRG Module Installer**.

**Scope**

This permission is available for the following scopes:

- System
- Role
- User
- Branch

**Policy**

N/A

**Enable Latitude Service Request Gateway Permission**

Use the Enable Latitude Service Request Gateway permission to specify whether to use Service Request Gateway for requesting services from vendors. The default value points to an IIS server that Latitude uses (primarily for hosted clients). If you are not using Latitude in a hosted environment, set up an IIS server to host the service.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Service Request Gateway** folder and then click **Enable Latitude Service Request Gateway**.

**Scope**

This permission is available for the System scope only.

**Policy**

The SRG Module Installer populates these boxes for the Latitude server with SRG installed. Enable the permission for a scope and then provide these values for each workstation with SRG installed.
- **URL of the Service Request Gateway (SRG):** URL address of the SRG server.
- **Client Identifier authenticating with the SRG:** Client ID for authenticating to the SRG server.
- **Password for authenticating with the SRG:** Password for authenticating to the SRG server.
- **Password for configuring the SRG:** Password for configuring SRG.
- **SRG Server Identifier:** Tokenizer identity thumbprint (located in the "ServerIdThumbprint.txt" file in the Tokenizer folder).

**Services Permissions and Policies**

**Access Services Permission**

Use the Access Services permission to specify whether users can view the **Services** menu.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Services** folder and then click **Access Services**.

**Scope**

This permission is available for all scopes.

**Policy**

N/A

**Equifax DTEC Permission**

Use the Equifax DTEC permission to specify whether users can request an Equifax DTEC (SSN) report.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Services** folder and then click **Equifax DTEC**.

**Scope**

This permission is available for all scopes.

**Policy**

N/A

**Equifax Finders Permission**

Use the Equifax Finders permission to specify whether users can request an Equifax Finders report.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Services** folder and then click **Equifax Finders**.

**Scope**

This permission is available for all scopes.
Policy
N/A

Equifax Full Permission
Use the Equifax Full permission to specify whether users can request an Equifax full credit report.

Location
In the Latitude Permissions and Policies Editor window, expand the Services folder and then click Equifax Full.

Scope
This permission is available for all scopes.

Policy
N/A

Experian Collect Permission
Use the Experian Collect permission to specify whether users can request an Experian collection report.

Location
In the Latitude Permissions and Policies Editor window, expand the Services folder and then click Experian Collect.

Scope
This permission is available for all scopes.

Policy
N/A

Experian Full Permission
Use the Experian Full permission to specify whether users can request an Experian full credit report.

Location
In the Latitude Permissions and Policies Editor window, expand the Services folder and then click Experian Full.

Scope
This permission is available for all scopes.

Policy
N/A

Experian SSN Search Permission
Use the Experian SSN Search permission to specify whether users can request an Experian social security number search report.
Location
In the Latitude Permissions and Policies Editor window, expand the Services folder and then click Experian SSN Search.

Scope
This permission is available for all scopes.

Policy
N/A

TransUnion DTEC Permission
Use the TransUnion DTEC permission to specify whether users can request a TransUnion DTEC (SSN) report.

Location
In the Latitude Permissions and Policies Editor window, expand the Services folder and then click TransUnion DTEC.

Scope
This permission is available for all scopes.

Policy
N/A

TransUnion Fact Permission
Use the TransUnion Fact permission to specify whether users can request a TransUnion fact report.

Location
In the Latitude Permissions and Policies Editor window, expand the Services folder and then click TransUnion Fact.

Scope
This permission is available for all scopes.

Policy
N/A

TransUnion Full Permission
Use the TransUnion Full permission to specify whether users can request a TransUnion full credit report.

Location
In the Latitude Permissions and Policies Editor window, expand the Services folder and then click TransUnion Full.

Scope
This permission is available for all scopes.
Policy
N/A

TUNA Wizard Application Settings Permission

Use the TUNA Wizard Application Settings permission to specify settings for TUNA Wizard, which pulls and attaches credit bureau reports for accounts using TransUnion. For more information, see your TransUnion representative.

Location

In the Latitude Permissions and Policies Editor window, expand the Services folder and then click TUNA Wizard Application Settings.

Scope

This permission is available for the System scope only.

Policy

This policy allows your organization to specify settings for using TUNA Wizard to pull credit bureau reports. Enable the permission for a scope and then specify the settings.

- **Bureau Market**: Two-character bureau market code the TransUnion representative provided.
- **Bureau Submarket**: Two-character bureau submarket code the TransUnion representative provided.
- **Industry Code**: Industry code the credit bureau assigned.
- **Member Code**: Member code the TransUnion representative assigned.
- **Subscriber Password**: Password the credit bureau office assigned. The system requires this password when sending inquires to the credit bureau.
- **Special Routing Indicator**: Indicator used for special routing.
- **URL**: URL for accessing TransUnion Net Access.
- **X509 Certificate**: X509 certificate.

Verify Requests Permission

Use the Verify Requests permission to specify whether users can verify data returned from a service provider.

Location

In the Latitude Permissions and Policies Editor window, expand the Services folder and then click Verify Requests.

Scope

This permission is available for all scopes.

Policy

N/A
**Tools Permissions and Policies**

**Access ListBuilder Program Permission**
Use the Access ListBuilder Program permission to specify whether users can use List Builder.

**Location**
In the **Latitude Permissions and Policies Editor** window, expand the **Tools** folder, expand the **ListBuilder** folder, and then click **Access ListBuilder Program**.

**Scope**
This permission is available for the following scopes:
- System
- Role
- User
- Branch

**Policy**
N/A

**Restrict Conditions Permission**
Use the Restrict Conditions permission to specify the conditions available to users in Query Designer.

**Location**
In the **Latitude Permissions and Policies Editor** window, expand the **Tools** folder, expand the **Query Designer** folder, and then click **Restrict Conditions**.

**Scope**
This permission is available for the following scopes:
- System
- Role
- User
- Branch

**Policy**
This policy allows your organization to limit the number of conditions available to the user when searching for accounts or using Query Designer. Enable the permission for a scope and then specify the conditions to allow. Conditions are in alphabetical order by their folders.

- **Restrict user to only allow the following conditions**: If selected, allows you to specify the conditions available to the user when using Query Designer.
- **Conditions**: Conditions that are available to the user.
Saved SQL Statement Maintenance Permission

Use the Saved SQL Statement Maintenance permission to specify whether users can open saved SQL statements.

Location

In the Latitude Permissions and Policies Editor window, expand the Tools folder and then click Saved SQL Statement Maintenance.

Scope

This permission is available for all scopes.

Policy

N/A

SQL Skip Requestor Permission

Use the SQL Skip Requestor permission to specify whether users can use SQL Skip Requestor.

Location

In the Latitude Permissions and Policies Editor window, expand the Tools folder and then click SQL Skip Requestor.

Scope

This permission is available for all scopes.

Policy

N/A

SQL Status Changer Permission

Use the SQL Status Changer permission to specify whether users can use Status Changer.

Location

In the Latitude Permissions and Policies Editor window, expand the Tools folder and then click SQL Status Changer.

Scope

This permission is available for all scopes.

Policy

N/A

Use DialerConfig Program with Existing Credentials Permission

Use the DialerConfig Program with Existing Credentials permission to specify whether users can use DialerConfig.

Location
In the **Latitude Permissions and Policies Editor** window, expand the **Tools** folder, expand the **DialerConfig** folder, and then click **DialerConfig Program with Existing Credentials**.

**Scope**

This permission is available for the following scopes:

- System
- Role
- User
- Branch

**Policy**

N/A

**Use Literal Conditions Permission**

Use the Use Literal Conditions permission to specify whether users can create a condition in Query Designer named "Literal Condition" to specify a block of SQL to use instead of the predefined conditions.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Tools** folder and then click **Use Literal Conditions**.

**Scope**

This permission is available for all scopes.

**Policy**

N/A

**Wallets Permissions and Policies**

**Add Payment Instruments Permission**

Use the Add Payment Instruments permission to specify whether users can add payment instruments to a person's wallet. For more information, see Add a Credit Card and Add a Checking or Savings Account.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Wallets** folder and then click **Add Payment Instruments**.

**Scope**

This permission is available for all scopes.

**Policy**

N/A
Delete Payment Instruments Permission

Use the Delete Payment Instruments permission to specify whether users can delete payment instruments from a person's wallet. For more information, see Delete a Payment Instrument.

Location

In the Latitude Permissions and Policies Editor window, expand the Wallets folder and then click Delete Payment Instruments.

Scope

This permission is available for all scopes.

Policy

N/A

Edit Payment Instruments Permission

Use the Edit Payment Instruments permission to specify whether users can modify payment instrument addresses. For more information, see Change the Address for a Payment Instrument.

Location

In the Latitude Permissions and Policies Editor window, expand the Wallets folder and then click Edit Payment Instruments.

Scope

This permission is available for all scopes.

Policy

N/A

Look up Payment Instruments Permission

Use the Look up Payment Instruments permission to specify whether users can look up payment instruments that are available during the current Latitude session only and are not saved to a person's wallet. For more information, see Look up a Payment Instrument.

Location

In the Latitude Permissions and Policies Editor window, expand the Wallets folder and then click Look up Payment Instruments.

Scope

This permission is available for all scopes.

Policy

N/A

Use Payment Instruments Permission

Use the Use Payment Instruments permission to specify whether users can select a payment instrument in a person's wallet to use in a payment arrangement. For more information, see the following:
• Select a Payment Type
• Change Payment Instrument for a Single Payment
• Change Payment Instrument for Multiple Payments

Location
In the **Latitude Permissions and Policies Editor** window, expand the **Wallets** folder and then click **Use Payment Instruments**.

Scope
This permission is available for all scopes.

Policy
N/A

**Web Access Permissions and Policies**

**Account View Customer Code Override Policy Permission**

Use the Account View Customer Code Override Policy permission to specify the report to display on the **Account** page in Web Access. If you specified a default report in the **Website User Policy permission** for a user or role, the report specified here displays instead.

Location
In the **Latitude Permissions and Policies Editor** window, expand the **Web Access** folder and then click **Account View Customer Code Override Policy**.

Scope
This permission is available for the following scopes:
- System
- Business Class
- Customer Group
- Customer

Policy
This policy allows your organization to specify the default report to display when viewing an account. Enable the permission for a scope and then select the report to display.

**Choose the report used for the Account View:**

- **Default_Account** - The main report used for viewing accounts: This option displays account details on the **Account** page in Web Access.

- **Default_AccountWithAIM** - The main report used for viewing accounts with AIM details: This option displays account details (including the Agency Details section) on the **Account** page in Web Access. Use this option to display agency information for accounts placed with an outside collection agency or attorney.
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| Note: This option only functions when enable the scope at the Customer Group level and set all other scopes to "Not Configured." |

**Website System Policy Permission**

Use the Website System Policy permission to specify the Web Access system administrator’s email address. All system, client, and customer emails sent from Web Access go to this email address.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Web Access** folder and then click **Website System Policy**.

**Scope**

This permission is available for the System scope only.

**Policy**

This policy allows your organization to specify the administrator’s email address. Enable the permission for a scope and then type the administrator’s email address.

**Website User Customer Access Policy Permission**

Use the Website User Customer Access Policy permission to specify the customer and customer groups available to Web Access users.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Web Access** folder and then click **Website User Customer Access Policy**.

**Scope**

This permission is available for the following scopes:

- System
- Role
- User
- Branch

**Policy**

This policy allows your organization to specify the customers and customer groups available to Web Access users. Enable the permission for a scope and then select the customer groups and customers.

**Website User Policy Permission**

Use the Website User Policy permission to specify the Web Access features that are available to a user or role.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Web Access** folder and then click **Website User Policy**.
Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

This policy allows your organization to specify the Web Access features that are available to a user or role. Enable the permission for a scope and then specify the settings.

- **User Can Search for Debtors**: If selected, the user can search for accounts.
- **User Can View the Audit Logs**: If selected, the user can view the audit trail for all user activities. We don't recommend that you set this policy for clients or customers because the logs contain user IP addresses.
- **User Can Add Notes to Debtor Accounts**: If selected, the user can add notes to accounts.
- **User Can Send a Message to Admin regarding Debtor Accounts**: If selected, the user can send an email message to the administrator regarding an account. The account number appears in the email subject line and the email goes to the email address specified in the Website System Policy permission.
- **User Can Send a Message to the Administrator**: If selected, the user can send an email message to the administrator. The email goes to the email address specified in the Website System Policy permission.
- **User Can Add a Report**: If selected, the user can add a report.
- **Send Admin an email when user logs into the website**: If selected, the system sends an email message to the administrator when the user logs on to the website. The email goes to the email address specified in the Website System Policy permission.
- **Echo email sent to user when they Add a Note or Send any Message**: If selected, the system sends an email message to the user when the user adds a note to an account or sends an email message to the administrator.
- **User Can Upload and Download files to the Web Server**: If selected, the user can upload files to and download files from the web server. If you select this option, specify the upload and download locations.
- **Enter the Upload Location (Full Path)**: Complete path to the location on the web server where you want to upload files.
- **Enter the Download Location (Full Path)**: Complete path to the location on the web server where you want to download files.
- **Note**: If you specify different upload and download paths, uploaded files are not available in the downloaded files folder and therefore, don't appear in the transfer files list.
Choose the report used for the Account View: Default report to display when viewing an account.

Choose the report used to return Search Results: Default report to display when viewing search results.

Reports: Reports that are available to the Web Access user.

Welcome Screen Permissions and Policies

Enhanced Dashboard Permissions and Policies

Animated Intro Permission
Use the Animated Intro permission to specify whether users can switch the animation (panes floating into place) that displays when Latitude opens the Enhanced Dashboard.

Location
In the Latitude Permissions and Policies Editor window, expand the Welcome Screen folder, expand the Enhanced Dashboard folder, and then click Animated Intro.

Scope
This permission is available for the following scopes:
- System
- Role
- User
- Branch

Policy
N/A

Collectors Performance Sort Permission
Use the Collectors Performance Sort permission to specify the sort order for the Collectors Performance grid.

Location
In the Latitude Permissions and Policies Editor window, expand the Welcome Screen folder, expand the Enhanced Dashboard folder, and then click Collectors Performance Sort.

Scope
This permission is available for the following scopes:
- System
- Role
- User
- Branch
Policy
This policy allows your organization to specify the sort order for the Collectors Performance data grid. Enable the permission for a scope and then select the sort order.

Edit Announcements Permission
Use the Edit Announcements permission to specify whether users can modify announcements in the Enhanced Dashboard.

Location
In the Latitude Permissions and Policies Editor window, expand the Welcome Screen folder, expand the Enhanced Dashboard folder, and then click Edit Announcements.

Scope
This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy
N/A

Horizontal Alignment Permission
Use the Horizontal Alignment permission to specify on which side of the viewing area the Enhanced Dashboard aligns when not stretched horizontally.

Location
In the Latitude Permissions and Policies Editor window, expand the Welcome Screen folder, expand the Enhanced Dashboard folder, and then click Horizontal Alignment.

Scope
This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy
This policy allows your organization to specify the horizontal placement of the Enhanced Dashboard. Centered is the default horizontal alignment. Enable the permission for a scope and then select the horizontal alignment.

Latest Posting Sound Permission
Use the Latest Posting Sound permission to specify the sound to play when the latest payment posting occurs.

**Location**
In the [Latitude Permissions and Policies Editor](#) window, expand the [Welcome Screen](#) folder, expand the [Enhanced Dashboard](#) folder, and then click [Latest Posting Sound](#).

**Scope**
This permission is available for the following scopes:
- System
- Role
- User
- Branch

**Policy**
This policy allows your organization to specify the sound to play when a payment posting occurs. If you select "None," the system plays no sound. Enable the permission for a scope and then select the sound to play.

**Latest Posting Threshold Permission**
Use the Latest Posting Threshold permission to specify the minimum payment posting amount required to trigger a [Latest Posting](#) notification in the upper right corner of the Enhanced Dashboard.

**Location**
In the [Latitude Permissions and Policies Editor](#) window, expand the [Welcome Screen](#) folder, expand the [Enhanced Dashboard](#) folder, and then click [Latest Posting Threshold](#).

**Scope**
This permission is available for the following scopes:
- System
- Role
- User
- Branch

**Policy**
This policy allows your organization to specify the minimum posting amount required for the posting to appear on the Enhanced Dashboard. Enable the permission for a scope and then specify the minimum posting amount required.

**Restrict Top Collectors to Team Permission**
Use the Restrict Top Collectors to Team permission to restrict the collectors that appear in the [Top Collectors](#) grid to only those collectors on the collector’s or supervisor’s team.

**Location**
In the **Latitude Permissions and Policies Editor** window, expand the **Welcome Screen** folder, expand the **Enhanced Dashboard** folder, and then click **Restrict Top Collectors to Team**.

**Scope**

This permission is available for all scopes.

**Policy**

N/A

**Skin Permission**

Use the Skin permission to specify the skin the Enhanced Dashboard uses. A skin defines the dashboard’s style and formatting.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Welcome Screen** folder, expand the **Enhanced Dashboard** folder, and then click **Skin**.

**Scope**

This permission is available for the following scopes:

- System
- Role
- User
- Branch

**Policy**

This policy allows your organization to specify the skin that the Enhanced Dashboard uses. Enable the permission for a scope and then select the skin. If you are on a low-bandwidth Citrix session, select the Citrix skin to eliminate the background details, which slightly increases performance.

**Stretch Horizontally Permission**

Use the Stretch Horizontally permission to stretch the Enhanced Dashboard horizontally to fill up the entire viewing area (which could cause it to look distorted).

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Welcome Screen** folder, expand the **Enhanced Dashboard** folder, and then click **Stretch Horizontally**.

**Scope**

This permission is available for the following scopes:

- System
- Role
- User
- Branch
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Policy

N/A

Top Collectors Max Count Permission

Use the Top Collectors Max Count permission to limit the number of collectors that appear in the Top Collectors list.

Location

In the Latitude Permissions and Policies Editor window, expand the Welcome Screen folder, expand the Enhanced Dashboard folder, and then click Top Collectors Max Count.

Scope

This permission is available for all scopes.

Policy

This policy allows your organization to specify the maximum number of collectors that can appear in the Top Collectors list. Enable the permission for a scope and then specify the maximum number of collectors that can appear.

Top Collectors Performance Columns Permission

Use the Top Collectors Performance Columns permission to specify which columns are visible in the Top Collector Performance grid.

Location

In the Latitude Permissions and Policies Editor window, expand the Welcome Screen folder, expand the Enhanced Dashboard folder, and then click Top Collectors Performance Columns.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

This policy allows your organization to specify the columns that are visible in the Top Collector Performance data grid. Enable the permission for a scope and then select the columns to display.

Top Stars Permission

Use the Top Stars permission to specify the number of rows that can have star icons at the top of the Collectors Performance grid.

Location

In the Latitude Permissions and Policies Editor window, expand the Welcome Screen folder, expand the Enhanced Dashboard folder, and then click Top Stars.
Scope
This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy
This policy allows your organization to specify the number of rows that can have star icons at the top of the Collectors Performance data grid. Enable the permission for a scope and then specify the number of rows.

Update Interval Permission
Use the Update Interval permission to specify the number of seconds between automatic updates (refreshes) to the Enhanced Dashboard.

Location
In the Latitude Permissions and Policies Editor window, expand the Welcome Screen folder, expand the Enhanced Dashboard folder, and then click Update Interval.

Scope
This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy
This policy allows your organization to specify the number of seconds between updates to the Enhanced Dashboard. Enable the permission for a scope and then specify the number of seconds. The minimum allowed is 60 seconds.

Use Gross Permission
Use the Use Gross permission to specify whether users can use gross instead of fee as the initial value basis when the Enhanced Dashboard starts.

Location
In the Latitude Permissions and Policies Editor window, expand the Welcome Screen folder, expand the Enhanced Dashboard folder, and then click Use Gross.

Scope
This permission is available for the following scopes:
Company Message Permission

Use the Company Message permission to create a message to display on the Latitude welcome page for all Latitude users.

Location

In the Latitude Permissions and Policies Editor window, expand the Welcome Screen folder and then click Company Message.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

This policy allows your organization to specify a message to display on the Latitude welcome page for all users. You can include HTML fragments (Internet Explorer supported) to emphasize text. This message displays on the screen as: "Message to all users: [message]".

Enable the permission for a scope and then specify the message.

Custom Application Directory Permission

Use the Custom Application Directory permission to specify the path to custom programs to display in the Custom menu.

Location

In the Latitude Permissions and Policies Editor window, expand the Welcome Screen folder and then click Custom Application Directory.

Scope

This permission is available for the following scopes:

- System
- Role
Policy

This policy allows your organization to specify the path to the directory that contains applications that display in the Custom menu. Enable the permission for a scope and then specify the settings.

- **URL**: Local UNC path to the custom application directory. You can specify a different path for each scope. If you don't specify a directory or don't enable the permission, the default points to the local drive "C:\Program Files (x86)\Latitude Software\bin\Custom".

- **Enumerate local custom directory**: If selected and you specified a directory other than the default, the system includes programs that are in the default directory in the Custom menu.

User Message Permission

Use the User Message permission to create a message to display on the Latitude welcome page for users within the specified scope.

Location

In the Latitude Permissions and Policies Editor window, expand the Welcome Screen folder and then click User Message.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

This policy allows your organization to specify a message to display on the Latitude welcome page for users within the specified scope. You can include HTML fragments (Internet Explorer supported) to emphasize text. This message displays on the screen as: "Message to [user name]: [message]."

Enable the permission for a scope and then specify the message.

Welcome Web Page Permission

Use the Welcome Web Page permission to specify the URL for the webpage to display as the background on the Latitude desktop. The URL can point to a local HTML file or a hosted webpage. If you specify a hosted webpage, the Latitude database information and current user ID pass to the web server to permit displaying user-specific "dashboard" information.

Location

In the Latitude Permissions and Policies Editor window, expand the Welcome Screen folder and then click Welcome Web Page.
Scope
This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy
This policy allows your organization to specify the URL for the webpage to display as the background on the Latitude welcome page. Enable the permission for a scope and then specify the settings.

- **URL:** Type the URL of the HTML resource to display as the background on the Latitude welcome page. You can specify a different path for each scope.
- **Pass Latitude user credentials to web server:** If selected, Latitude credentials pass to the web server when loading the page.

Welcome Window Permission
Use the Welcome Window permission to display a window on the Latitude welcome page instead of a webpage.

Location
In the Latitude Permissions and Policies Editor window, expand the Welcome Screen folder and then click **Welcome Window**.

Scope
This permission is available for all scopes.

Policy
This policy allows your organization to specify a window to display on the Latitude welcome page. Enable the permission for a scope and then specify the window information.

- **Assembly DLL Path:** Assembly DLL path to the welcome window.
- **WCF Host Name:** WCF host name.
- **WCF Host Port (495 = default):** WCF host port.
- **Connect using Secure Sockets layer (SSL):** If selected, connects to the welcome window using SSL.

Work Form Permissions and Policies
Panels Permissions and Policies
Care and Hardships User Policy Permission
Use the Care and Hardships User Policy permission to specify whether users can add or modify care and hardship cases. For more information, see Care and Hardship.
Location

In the Latitude Permissions and Policies Editor window, do the following:

1. Expand the Work Form folder.
2. Expand the Panels folder.
3. Expand the Care and Hardships folder.
4. Click User Policy.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

This policy allows your organization to specify the care and hardship features that are available to users. Enable the permission for a scope and then specify the settings.

- User may create new care and hardships record: If selected, the user can create care and hardships for an account.
- User may view/edit care and hardships record: If selected, the user can view and edit care and hardships for an account.
- User can edit a finalized care and hardships record: If selected, the user can edit finalized care and hardships for an account.

Complaints User Policy Permission

Use the Complaints User Policy permission to specify whether users can add or modify complaints. For more information, see Complaints.

Location

In the Latitude Permissions and Policies Editor window, do the following:

1. Expand the Work Form folder.
2. Expand the Panels folder.
3. Expand the Complaints folder.
4. Click User Policy.

Scope

This permission is available for the following scopes:

- System
Policy

This policy allows your organization to specify the complaint features that are available to users. Enable the permission for a scope and then specify the settings.

- **User may create new complaint record**: If selected, the user can create complaints for an account.
- **User may view/edit complaint record**: If selected, the user can view and edit complaints for an account.
- **User can perform investigation on complaint record**: If selected, the user can investigate complaints for an account.
- **User can finalize complaint record**: If selected, the user can finalize complaints for an account.
- **User can edit a finalized complaint record**: If selected, the user can edit finalized complaints for an account.

Disputes User Policy Permission

Use the Disputes User Policy permission to specify whether users can add or modify disputes. For more information, see Disputes.

Location

In the Latitude Permissions and Policies Editor window, do the following:

1. Expand the Work Form folder.
2. Expand the Panels folder.
3. Expand the Disputes folder.
4. Click User Policy.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

This policy allows your organization to specify the dispute features that are available to users. Enable the permission for a scope and then specify the settings.

- **User may create new dispute record**: If selected, the user can create disputes for an account.
• **User may view/edit dispute record:** If selected, the user can view and edit disputes for an account.

• **User can finalize a dispute record:** If selected, the user can finalize disputes for an account.

• **User can edit a finalized dispute record:** If selected, the user can edit finalized disputes for an account.

**Allow Advanced Search Permission**

Use the Allow Advanced Search permission to specify whether the Advanced Search tab in the Search for Account dialog box is available to the user.

**Location**

In the Latitude Permissions and Policies Editor window, expand the Work Form folder and then click Allow Advanced Search.

**Scope**

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Department
- Team
- Desk

**Policy**

N/A

**Custom Queue Options Permission**

Use the Custom Queue Options permission to specify account rules for a Custom queue.

**Location**

In the Latitude Permissions and Policies Editor window, expand the Work Form folder and then click Custom Queue Options.

**Scope**

This permission is available for the following scopes:

- System
- Role
- User
- Branch
Policy
This policy allows your organization to specify the account queuing options. Enable the permission for a scope and then specify the options.

- **Enforce collector queuing rules**: If selected, the system doesn't queue accounts in custom queues that don't appear in a collector queue because of regular rules.
- **Enforce time zone rules**: If selected, the system doesn't queue accounts in custom queues that don't appear in a collector queue because of time zone restrictions until the time zone occurs.

Enable Latitude Automation Server Permission
Use the Enable Latitude Automation Server permission to enable or disable the Latitude Automation Server. If the Latitude Automation Server is causing problems, disable it using this permission.

Location
In the Latitude Permissions and Policies Editor window, expand the **Work Form** folder and then click **Enable Latitude Automation Server**.

Scope
This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy
N/A

Label Replacements Permission
Use the Label Replacements permission to specify the labels for certain data in the **Work Form**.

Location
In the Latitude Permissions and Policies Editor window, expand the **Work Form** folder and then click **Label Replacements**.

Scope
This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy
This policy allows your organization to customize label captions displayed in the **Work Form**. Enable the permission for a scope and then type a new label into the box.

**Phonetic Name Search Permission**

Use the Phonetic Name Search permission to specify whether phonetic name searching is the default selection for simple searches.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Work Form** folder and then click **Phonetic Name Search**.

**Scope**

This permission is available for the following scopes:

- System
- Role
- User
- Branch

**Policy**

This policy allows your organization to specify whether to allow phonetic name searching on accounts. Enable the permission for a scope and then specify the options.

- **Use phonetic name searching by default**: If selected, allows the user to use phonetic name searching when searching for accounts.

**Pie Queue Options Permission**

Use the Pie Queue Options permission to specify whether users can view or work another user’s desk in a pie queue.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **Work Form** folder and then click **Pie Queue Options**.

**Scope**

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Department
- Team
Desk Policy
This policy allows your organization to specify the pie queue options. Enable the permission for a scope and then specify the options.

- **Allow multiple desks**: If selected, allows the user to select more than one desk to work in the pie queue.
  
  **Note**: The user must have the [Work Other Desks permission](#) or the multiple desk option is not available.
  
- **Maximum Accounts**: Maximum number of accounts that users can work in a pie queue based on the defined user scope (to maximize performance).
- **Criteria**: Criteria that are available to the user for selection in the pie queue.

Queue Providers Permission
Use the Queue Providers permission to specify the queue providers that are available for the user to work.

**Location**
In the [Latitude Permissions and Policies Editor](#) window, expand the **Work Form** folder and then click **Queue Providers**.

**Scope**
This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy
This policy allows your organization to specify the queue providers that display in the **Work Form**. Enable the permission for a scope and then select the queues a user can open from the **Work Form**.

Simple Account Search Items Permission
Use the Simple Account Search Items permission to specify which search criteria are available for simple searches. If not specified, the default criteria are available.

**Location**
In the [Latitude Permissions and Policies Editor](#) window, expand the **Work Form** folder and then click **Simple Account Search Items**.

**Scope**
This permission is available for the following scopes:
Policy
This policy allows your organization to specify the search criteria that is available when searching for accounts. Enable the permission for a scope and then select the search criteria to display.

Simple Account Search Results Permission
Use the Simple Account Search Results permission to specify which columns display in search results. If not specified, the default columns display.

Location
In the Latitude Permissions and Policies Editor window, expand the Work Form folder and then click Simple Account Search Results.

Scope
This permission is available for the following scopes:
- System
- Role
- User
- Branch

Policy
This policy allows your organization to specify the search results data that displays when searching for accounts. Enable the permission for a scope and then select the data to display.

Work Form Panels Permission
Use the Work Form Panels permission to specify which panels to display in the Work Form.

Location
In the Latitude Permissions and Policies Editor window, expand the Work Form folder and then click Work Form Panels.

Scope
This permission is available for the following scopes:
- System
Policy

This policy allows your organization to specify the panels to display in the **Work Form**. Enable the permission for a scope and then specify the settings.

- **Default Panel**: Default panel to display in the **Work Form**.
- **Change to default panel for each account**: If selected, the default panel displays for each account.
- **Available Panels**: Panels to display in the lower section of the **Work Form**.

<table>
<thead>
<tr>
<th>Panel</th>
<th>Related Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>AIM Panel</td>
<td>AIM</td>
</tr>
<tr>
<td>AIM Receiver Panel</td>
<td>AIM Receiver</td>
</tr>
<tr>
<td>Archive Panel</td>
<td>View an Archived Account</td>
</tr>
<tr>
<td>Automotive Panel</td>
<td>Automotive Information</td>
</tr>
<tr>
<td>Care and Hardship</td>
<td>Care and Hardship</td>
</tr>
<tr>
<td>CBR Utility Panel</td>
<td>Manage Miscellaneous CBR Settings</td>
</tr>
<tr>
<td>Complaints</td>
<td>Complaints</td>
</tr>
<tr>
<td>Credit Bureau Reporting</td>
<td>Credit Bureau Reporting</td>
</tr>
<tr>
<td>Credit Reports</td>
<td>Credit Reports</td>
</tr>
<tr>
<td>Custom Data</td>
<td>Custom Data</td>
</tr>
<tr>
<td>Disputes</td>
<td>Disputes</td>
</tr>
<tr>
<td>Documentation</td>
<td>Account Documentation</td>
</tr>
<tr>
<td>Early Stage</td>
<td>View Early Stage Information</td>
</tr>
<tr>
<td>Income and Expenditures</td>
<td>Income and Expenditures</td>
</tr>
<tr>
<td>Interest Accrual Tracking</td>
<td>View Interest Accrual</td>
</tr>
<tr>
<td>Latitude Legal</td>
<td>View Legal Information</td>
</tr>
<tr>
<td>Nearbys</td>
<td>Nearby Contacts</td>
</tr>
<tr>
<td>Patient Info</td>
<td>Patient Information</td>
</tr>
</tbody>
</table>
### WorkFlow Permissions and Policies

The following permissions and policies are available for WorkFlow Designer:

- **Latitude WorkFlow Engine Settings Permission**
- **Manually Pause WorkFlow Permission**
- **Manually Raise Event Permission**
- **Manually Release WorkFlow Permission**
- **Manually Resume WorkFlow Permission**
- **Manually Start WorkFlow Permission**
- **Manually Stop WorkFlow Permission**

#### Latitude WorkFlow Engine Settings Permission

Use the Latitude WorkFlow Engine Settings permission to specify settings for Latitude WorkFlow Engine.

**Location**

In the **Latitude Permissions and Policies Editor** window, expand the **WorkFlow** folder and then click **Latitude WorkFlow Engine Settings**.

**Scope**

This permission is available for the System scope only.

**Policy**

This policy allows your organization to specify settings for Latitude WorkFlow Engine. Enable the permission for a scope and then specify the settings.

- **Execution Duration [min]**: Maximum number of minutes Latitude WorkFlow Engine continues to run in a single session. Latitude WorkFlow Engine processes events and activities until the event queue is empty or reaching the time limit set here.

- **Action Activities**: Maximum number of accounts Latitude WorkFlow Engine can process when running action activities. This setting represents "batches" of account activity by type and prevents server process overload.

- **Condition Activities**: Maximum number of accounts Latitude WorkFlow Engine can process when running condition activities.

- **Query Activities**: Maximum number of accounts Latitude WorkFlow Engine can process when running query activities.
• **Switch Activities**: Maximum number of accounts Latitude WorkFlow Engine can process when running switch activities.

• **Email Address**: Email address of the person who is monitoring Latitude WorkFlow Engine activity.

**Manually Pause WorkFlow Permission**

Use the Manually Pause WorkFlow permission to specify whether users can pause a workflow that is running on any account.

**Location**

In the Latitude Permissions and Policies Editor window, expand the WorkFlow folder and then click **Manually Pause WorkFlow**.

**Scope**

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Business Class
- Customer Group
- Customer

**Policy**

N/A

**Manually Raise Event Permission**

Use the Manually Raise Event permission to specify whether users can raise an event on any account.

**Location**

In the Latitude Permissions and Policies Editor window, expand the WorkFlow folder and then click **Manually Raise Event**.

**Scope**

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Business Class
• Customer Group
• Customer

Policy
N/A

**Manually Release WorkFlow Permission**

Use the Manually Release WorkFlow permission to specify whether users can release a parent workflow that is waiting on a child workflow to complete, which allows the waiting workflow to continue.

**Location**

In the Latitude Permissions and Policies Editor window, expand the WorkFlow folder and then click Manually Release WorkFlow.

**Scope**

This permission is available for the following scopes:

• System
• Role
• User
• Branch
• Business Class
• Customer Group
• Customer

Policy
N/A

**Manually Resume WorkFlow Permission**

Use the Manually Resume WorkFlow permission to specify whether users can resume a paused workflow on any account.

**Location**

In the Latitude Permissions and Policies Editor window, expand the WorkFlow folder and then click Manually Resume WorkFlow.

**Scope**

This permission is available for the following scopes:

• System
• Role
• User
Manually Start WorkFlow Permission

Use the Manually Start WorkFlow permission to specify whether users can start a workflow on any account.

Location

In the Latitude Permissions and Policies Editor window, expand the WorkFlow folder and then click Manually Start WorkFlow.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Business Class
- Customer Group
- Customer

Policy

N/A

Manually Stop WorkFlow Permission

Use the Manually Stop WorkFlow permission to specify whether users can stop a workflow that is running on any account.

Location

In the Latitude Permissions and Policies Editor window, expand the WorkFlow folder and then click Manually Stop WorkFlow.

Scope

This permission is available for the following scopes:

- System
System Codes and Settings

Use the Maintenance window to maintain codes and settings for your Latitude system and database.

1. **Menu bar**: Displays submenus and commands for system codes and settings.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Control File Properties</td>
<td>Displays the Latitude - Control File Properties dialog box to allow you to maintain global Latitude settings for your agency.</td>
</tr>
<tr>
<td>Close</td>
<td>Closes the Maintenance window.</td>
</tr>
<tr>
<td>Hide Search/Search</td>
<td>If the search option is available, displays and hides the Search pane for the selected folder.</td>
</tr>
<tr>
<td>Print</td>
<td>If a report is available, sends the report to your default printer for the selected folder.</td>
</tr>
<tr>
<td>Printer Setup</td>
<td>Displays the Print dialog box to allow you to select printer settings.</td>
</tr>
</tbody>
</table>
Maintain ZIP Codes and Time Zones

Use the Zip Code/Time Zone Maintenance dialog box to update ZIP Codes and time zones in the system.

**Important! Do NOT** perform this update when users are logged on.

To update ZIP Codes and time zones

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.
2. In the menu bar, click File and then click ZIP Code/Time Zone Import. The Zip Code/Time Zone Maintenance dialog box appears.

3. Click in the **File Name** box, select the file to import, and click Open. The system populates the File Name box with the specified path and file name.
4. Click **Begin Import**.
5. In the Confirmation dialog box, click Yes. The system updates the ZIP Codes and time zones.
Control File Properties

Maintain Company Information

Use the **Company** tab in the **Control File Properties** dialog box to maintain your agency's information.

To maintain company information

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.
2. In the menu bar, click **File** and then click **Control File Properties**. The **Latitude - Control File Properties** dialog box appears.
3. Click the **Company** tab.
4. Complete the information and then click **OK**.

Maintain Money Titles

Use the **Money Titles** tab in the **Control File Properties** dialog box to specify labels for amounts (money buckets) you want to record when adding or modifying debtor accounts.

To maintain money titles

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.
2. In the menu bar, click **File** and then click **Control File Properties**. The **Latitude - Control File Properties** dialog box appears.
3. Click the Money Titles tab.

Money1: Reserved for principal.

Money2: Reserved for interest.

Money10: Reserved for transaction charges.

Money3 through Money9: You can use these money buckets to store whatever dollar amounts you want. The values you provide in these boxes become the labels for dollar amounts that appear on the Balance tab in the New Business window.

For example, Money 3 has a value of Collection Costs. This label appears on the Balance tab in the New Business window so you can enter a collection cost dollar amount. For more information, see Balance.

4. Add up to seven labels and then click OK.

Note: We recommend that you don’t change the money buckets after you set them up and add accounts to Latitude.

Maintain Letter Defaults

Use the Letter Defaults tab in the Control File Properties dialog box to specify the default letters to display for specific transactions. You generate letters using Letter Console.

To maintain letter defaults

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.

2. In the menu bar, click File and then click Control File Properties. The Latitude - Control File Properties dialog box appears.

3. Click the Letter Defaults tab.
Reminder Letter: Letter to remind debtors of their payment promise due date and amount due. The system generates this letter when a collector adds a debtor promise to an account.

Post Dated Check Notice: Letter to notify the debtor of the deposit date. The system generates this letter when a collector adds a post-dated check or credit card payment to a debtor account.

Broken Promise: Letter to notify the debtor the date they promised to pay has passed. The system generates this letter when a debtor promise becomes past due and you don’t receive a payment.

4. Complete the information and then click OK.

Maintain System Settings

Use the Settings tab in the Control File Properties dialog box to specify system-wide default settings.

To maintain system settings

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.
2. In the menu bar, click File and then click Control File Properties. The Latitude - Control File Properties dialog box appears.
3. Click the Settings tab.
Change...: Allows the administrator account user to reset the administrator account password.

Next File Number: Unique number to assign to the next new debtor account. The system assigns the next sequential file number to each account added thereafter. We recommend that you don't change this number after importing accounts initially.

Next Link Number: Unique number to assign to the next link created. A link number identifies a group of debtor accounts that you linked together. The system assigns the next sequential link number to each link created thereafter.

Next Payment Batch: Unique number to assign to the next payment batch created for entering payments into Latitude. The system assigns the next sequential payment batch number to each payment batch created thereafter.

Next Invoice Number: Unique number to assign to the next invoice generated by Latitude Invoices. The system assigns the next sequential invoice number to each invoice created thereafter.

General Trust: Account used for deposits when the customer doesn't have a trust account assigned. The account assigned as the General Trust account initially (upon upgrade or conversion) is the bank account with the lowest code (number) assigned.

Operating Trust: Account used for transaction surcharge deposits. You can use the same bank as the General Trust account. The account assigned initially (upon upgrade) is the bank account with the lowest code (number) assigned.

Current Month: Current processing month for Latitude. Only change the month using this list box during system implementation or when Latitude by Genesys Support instructs you to. All other times, click Set New Month instead.

Current Year: Current processing year for Latitude. Only change the year using this list box during system implementation or when Latitude by Genesys Support instructs you to. All other times, click Set New Month instead.
End of Month Date: Last posting day for the current month. This value isn't necessarily the last calendar day of the month. Used for MTC collections report projections.

Set New Month: Advances the accounting period to the next month and, if applicable, year.

Note: Process payments, adjustments, invoices, new business imports, and reports for the current month and year before changing the accounting period. For example, you can process May business in June as long as you haven't changed the accounting period to June.

Reset Desk CBR Limits: Resets the number of Credit Bureau Requests (CRBs) to zero (0) for all desks. Desks have a limit on the number of CBRs they can request each month. When you change the accounting period, reset the number of CBRs.

4. To change the administrator password, do the following:
   a. Next to System Password, click Change... The Change System Password dialog box appears.

   b. In the New Password and Confirm boxes, type the new password and then click OK.

5. To increment the current month and year after processing is complete for the month, do the following:
   a. Click Set New Month. A confirmation dialog box appears.

   b. Click Yes. The system sets the Current Month box to the next month. If it's the end of the year, the system sets the Current Year box to the next year.

   c. Verify that the correct date is in the End Of Month Date box. If the date is incorrect, in the End Of Month Date box, select the correct date from the calendar.

6. To reset the number of CBRs to zero (0) for all desks, click Reset Desk CBR Limits.

7. Complete the remaining information on the tab and then click OK.

Maintain Account Titles

Use the Account Titles tab in the Control File Properties dialog box to specify labels for dates you want to record when adding or modifying debtor accounts.

To maintain account titles

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.

2. In the menu bar, click File and then click Control File Properties. The Latitude - Control File Properties dialog box appears.
3. Click the **Account Titles** tab.

![Account Titles Tab](image)

**User Date Title 1** through **User Date Title 3**: The values you provide in these boxes become the labels for dates you want to appear on the **Dates** tab in the **New Business** window.

For example, **User Date Title 1** has a value of **Date First Billed**. This label appears on the **Dates** tab in the **New Business** window so you can enter the date you first billed the debtor. For more information, see **Dates**.

4. Add up to three labels and then click **OK**.

### Maintain Customer Titles

**Maintain Customer Titles**

**Maintain Customer Titles**

Use the **Customer Titles** tab in the **Control File Properties** dialog box to specify labels for data you want to record when adding or modifying customer accounts. The labels appear on the **Custom** tab in the **Customer Properties** window. For more information, see **Customer Codes**.

**Maintain Customer Date Titles**

Use the **Dates** tab on the **Customer Titles** tab in the **Control File Properties** dialog box to specify labels for dates you want to display when adding or modifying customer accounts. The labels appear on the **Custom** tab in the **Customer Properties** window. For more information, see **Customer Codes**.

**To maintain customer date titles**

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.

2. In the menu bar, click **File** and then click **Control File Properties**. The **Control File Properties** dialog box appears.

3. Click the **Customer Titles** tab and then click the **Dates** tab.
Date 1 through Date 9: The values you provide in these boxes become the labels for dates you want to appear on the Custom tab in the Customer Properties window.

For example, Date 1 has a value of Bankruptcy Date. This label appears on the Dates tab, on the Custom tab, in the Customer Properties window so you can provide a bankruptcy date.

4. Add up to nine labels and then click OK.

Maintain Customer Option Titles

Use the Options tab on the Customer Titles tab in the Control File Properties dialog box to specify labels for check box options you want to display when adding or modifying customer accounts. The labels appear on the Custom tab in the Customer Properties window. For more information, see Customer Codes.

To maintain customer option titles

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.

2. In the menu bar, click File and then click Control File Properties. The Control File Properties dialog box appears.

3. Click the Customer Titles tab and then click the Options tab.
Option 1 through Option 9: The values you provide in these boxes become the labels for options you want to appear on the Options tab, on the Custom tab, in the Customer Properties window.

For example, Option 1 has a value of Filed Bankruptcy. This label appears on the Options tab, on the Custom tab, in the Customer Properties window. It allows you to select or clear the check box to indicate if the customer filed bankruptcy.

4. Add up to nine labels and then click OK.

Maintain Customer Value Titles

Use the Values tab on the Customer Titles tab in the Control File Properties dialog box to specify labels for numeric values you want to display when adding or modifying customer accounts. The labels appear on the Custom tab in the Customer Properties window. For more information, see Customer Codes.

To maintain customer value titles

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.

2. In the menu bar, click File and then click Control File Properties. The Control File Properties dialog box appears.

3. Click the Customer Titles tab and then click the Values tab.
Value 1 through Value 9: The values you provide in these boxes become the labels for numeric values you want to appear on the Values tab, on the Custom tab, in the Customer Properties window.

For example, Value 1 has a value of Number of Bankruptcies Filed. This label appears on the Values tab, on the Custom tab, in the Customer Properties window so you can provide the number of bankruptcies filed by the customer.

4. Add up to nine labels and then click OK.

Maintain Customer Text Titles

Use the Text tab on the Customer Titles tab in the Control File Properties dialog box to specify labels for text you want to display when adding or modifying customer accounts. The labels appear on the Custom tab in the Customer Properties window. For more information, see Customer Codes.

To maintain customer text titles

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.

2. In the menu bar, click File and then click Control File Properties. The Control File Properties dialog box appears.

3. Click the Customer Titles tab and then click the Text tab.
Text 1 through Text 9: The values you provide in these boxes become the labels for text you want to appear on the Options tab, on the Custom tab, in the Customer Properties window.

For example, Text 1 has a value of Bankruptcy Status. This label appears on the Custom tab in the Customer Properties window so you can provide the status of the bankruptcy.

4. Add up to nine labels and then click OK.

Maintain File Paths

Use the File Paths tab in the Control File Properties dialog box to specify the location of the database backup file and the location to reports your agency created using Crystal Reports.

To maintain file paths

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.

2. In the menu bar, click File and then click Control File Properties. The Latitude - Control File Properties dialog box appears.

3. Click the File Paths tab.
Database Backup Path: Location where you want your Latitude database backup files stored.

Crystal Reports Path: Location of reports that your agency created.

Web Base: This box is no longer used.

4. Complete the information and then click OK.

Maintain Miscellaneous Settings

Use the Miscellaneous tab in the Control File Properties dialog box to specify the "You've Got Claims" identification number and the name of your outgoing email server.

To maintain miscellaneous settings

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.

2. In the menu bar, click File and then click Control File Properties. The Latitude - Control File Properties dialog box appears.

3. Click the Miscellaneous tab.
You Got Claims ID: "You've Got Claims" identification number used for legal accounts.

Mail Server (Out): Network name of the outgoing email server. This setting must be correct for email letter functions to work.

4. Complete the information and then click OK.

System Codes

System Codes

Use the Latitude Maintenance window to add and modify system codes used throughout Latitude. If you are an administrator user, you can also delete certain system codes.

Search for a System Code

Use the Latitude Maintenance window to search for system codes. The search process is the same for all codes except ABA codes and customers. For more information about ABA code and customer searches, see Search for an ABA Code and Search for a Customer.

To search for a system code

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.

2. In the Navigation pane, click the folder of the code to search. The following example shows the Action Code folder.
3. In the Information pane, do one of the following:
   - Type the first character of the code to locate.
   - Use the scroll bar to move through the list.
   - Use the Page Up and Page Down keys to move through the list.

Delete a System Code

Use the Latitude Maintenance window to delete a system code. Only Administrators can delete system codes. The deletion process is the same for all codes except ABA codes and customers. For more information about ABA code and customer deletions, see Delete an ABA Code and Delete a Customer.

To delete a system code

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.
2. In the Navigation pane, click the folder of the code to delete. The following example shows the Action Code folder.
3. In the **Information** pane, right-click the action code and then click **Delete**. A confirmation dialog box appears.

4. Click **Yes**.

**ABA Codes**

**ABA Codes**

Use the **Latitude Maintenance** window to search for or delete American Bankers Association (ABA) codes (routing numbers). Use the **ABA Routing Properties** dialog box to add or modify ABA codes. The system uses routing numbers to verify the financial institution when you submit a check, ACH, electronic funds transfer, or online banking transaction.

**To add or modify an ABA code**

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.

2. In the **Navigation** pane, do one of the following:
   - To add an ABA code, right-click the **ABA** folder and then click **New ABA Routing Code**. The **ABA Routing Properties** dialog box appears without any values.
   - To modify an ABA code, do the following:
     a. Click the **ABA** folder.
     b. In the **Information** pane, type search criteria into one or more boxes and then click **Find Now**.
c. Right-click the record in the search results and then click Properties. The ABA Routing Properties dialog box appears with the current values.

3. Complete the information and then click OK.

Search for an ABA Code

Use the Latitude Maintenance window to search for an American Bankers Association (ABA) code.

To search for an ABA code

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.
2. In the Navigation pane, click the ABA folder.
3. In the Information pane, type search criteria into one or more boxes and then click Find Now.
Delete an ABA Code

Use the Latitude Maintenance window to delete an American Bankers Association (ABA) code. Only Administrators can delete ABA codes.

To delete an ABA code

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.
2. In the Navigation pane, click the ABA folder.
3. Search for an ABA code.
4. In the Information pane, in the search results, right-click the ABA code and then click Delete. A confirmation dialog box appears.
5. Click Yes.
**Action Codes**

Use the Latitude Maintenance window to search for or delete actions codes. Use the Action Code Properties dialog box to add or modify action codes. Action codes are abbreviations for actions you can perform on an account. When working an account, you select the action code that indicates the action you performed on the account. These codes are available on certain reports. Latitude releases with several standard action codes (for example, 3P for Third Party, CO for Comment Only).

**Note:** Some Latitude system processes require specific action codes. For more information, see Action and Result Codes.

**To add or modify an action code**

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.
2. In the Navigation pane, do one of the following:
   - To add an action code, right-click the Action Code folder and then click New Action Code. The Action Code Properties dialog box appears without any values.
   - To modify an action code, right-click the action code and then click Properties. The Action Code Properties dialog box appears with the current values.

Consider as attempted: If selected, indicates that a user attempted to work the account.

Consider as worked: If selected, indicates that a user worked the account.

3. Complete the information and then click OK.

**Attorney/Forwarder Codes**

Use the Latitude Maintenance window to search for or delete attorney and forwarder codes. Use the Attorney/Forwarder Properties dialog box to add or modify attorney and forwarder codes. You can assign debtor accounts to attorneys and forwarders from the Work Form. You can also merge this information into legal documents using Letter Console.
To add or modify an attorney or forwarder code

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.

2. In the **Navigation** pane, do one of the following:

   - To add an attorney or forwarder code, right-click the **Attorney/Forwarder** folder and then click **New Attorney**. The **Attorney/Forwarder Properties** dialog box appears without any values.
   - To modify an attorney or forwarder code, right-click the attorney or forwarder and then click **Properties**. The **Attorney/Forwarder Properties** dialog box appears with the current values.

**General tab**

**Attorney ID Code**: Internal code assigned by your organization to identify the attorney or forwarder.

**Fee Percentage**: Attorney's or Forwarder's fee to send with You Got Claims files.

**You Got Claims ID**: ID used to generate files for the You Got Claims interface.

**Important!** Provide the correct ZIP Code for searching to occur within the "assign account to attorney" option.

**Law Lists tab**

Select the attorney's or forwarder's law list associations.

**Remarks tab**
Type comments or notes about the attorney or forwarder.

3. Complete the information and then click OK.

Bank Codes

Bank Codes

Use the Latitude Maintenance window to search for or delete bank codes. Use the Bank Properties dialog box to add or modify bank codes. You use bank codes to set up separate records for each trust account that accepts deposits of funds from your agency.

To add or modify a bank code

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.

2. In the Navigation pane, do one of the following:
   - To add a bank code, right-click the Bank folder and then click New Bank. The Bank Properties dialog box appears without any values.
   - To modify a bank code, right-click the bank code and then click Properties. The Bank Properties dialog box appears with the current values.

![Bank Properties Dialog Box](image)

- **Account Code**: A numeric code up to five digits in length that your agency uses to identify the account internally.
- **Account Title**: Title for the account (could include a customer name).
- **Checking Account Number**: Your agency’s checking account number for the trust account.
- **Starting Check Number**: (optional) If your agency is printing checks using Latitude Invoices, type the first check number to use.
ISO Currency Code: Not available.

Permit Deposit to General Trust Account: Allows money collected and split among linked accounts having different banks to deposit to the General Trust initially. This process affects linked account selection in the Arrangements Wizard, as the system only includes accounts that deposit to the same trust or general trust in the same payment arrangement.

3. Complete the information and then click OK.

Branch Codes

Branch Codes

Use the Latitude Maintenance window to search for or delete branch codes. Use the Branch Properties dialog box to add or modify branch codes. Use branch codes for agencies that have more than one office (or branch) to allow inventory separation by location.

To add or modify a branch code

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.

2. In the Navigation pane, do one of the following:

- To add a branch code, right-click the Branch folder and then click New Branch. The Branch Properties dialog box appears without any values.

- To modify a branch code, right-click the branch code and then click Properties. The Branch Properties dialog box appears with the current values.

3. Complete the information and then click OK.

Claim Type Codes

Claim Type Codes

Use the Latitude Maintenance window to search for or delete claim type codes. Use the Claim Type Properties dialog box to add or modify claim type codes. Claim types are for accounts that your agency
handles. You can assign debtor accounts to a claim type from the Work Form in the Account Miscellaneous Information window under Account Type.

**To add or modify a claim type code**

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.
2. In the Navigation pane, do one of the following:
   - To add a claim type code, right-click the Claim Type folder and then click New Claim Type. The Claim Type Properties dialog box appears without any values.
   - To modify a claim type code, right-click the claim type code and then click Properties. The Claim Type Properties dialog box appears with the current values.
3. Complete the information and then click OK.

**Class of Business Codes**

**Class of Business Codes**

Use the Latitude Maintenance window to search for or delete class of business codes. Use the Class of Business Properties dialog box to add or modify class of business codes. Use class of business codes to group the type of company each of your clients represents, which you set in the Customer Properties window. The system applies the customer class of business to accounts that you import for a customer. You can change individual accounts in the Account Miscellaneous Information window under Account Type.

Latitude uses class of business codes to group customers for certain system settings, such as:
- Settings to link accounts.
- Settings to report to credit bureaus (see Credit Bureau Reporting Console).

**To add or modify a class of business code**

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.
2. In the Navigation pane, do one of the following:
   - To add a class of business code, right-click the Class of Business folder and then click New Class of Business. The Class of Business Properties dialog box appears without any values.
   - To modify a class of business code, right-click the class of business code and then click Properties. The Class of Business Properties dialog box appears with the current values.
3. Complete the information and then click **OK**.

**Court Codes**

**Court Codes**

Use the *Latitude Maintenance* window to search for or delete court codes. Use the **Court Properties** dialog box to add or modify court codes. You can assign debtor accounts to a court from the **Work Form** in the **Legal View** dialog box. You can merge this information into legal documents using Letter Console.

**To add or modify a court code**

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The *Latitude Maintenance* window appears.

2. In the **Navigation** pane, do one of the following:

   - To add a court code, right-click the **Court** folder and then click **New Court**. The **Court Properties** dialog box appears without any values.

   - To modify a court code, right-click the court code and then click **Properties**. The **Court Properties** dialog box appears with the current values.
3. Complete the information and then click **OK**.

**Court Case Status Codes**

**Court Case Status Codes**

Use the **Latitude Maintenance** window to search for or delete court case status codes. Use the **Court Case Status Properties** dialog box to add or modify court case status codes.

**To add or modify a court case status code**

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.

2. In the **Navigation** pane, do one of the following:
   - To add a court case status code, right-click the **Court Case Status** folder and then click **New Court Case Status**. The **Court Case Status Properties** dialog box appears without any values.
   - To modify a court case status code, right-click the court case status code and then click **Properties**. The **Court Case Status Properties** dialog box appears with the current values.

3. Complete the information and then click **OK**.
Credit Card Type Codes

Credit Card Type Codes

Use the Latitude Maintenance window to search for or delete credit card type codes. Use the Credit Card Type Properties dialog box to add or modify credit card type codes that your agency accepts for debtor payments. Credit cards are available for selection in the Work Form when entering a credit card payment. The algorithm for the credit card determines whether the system recognizes the credit card in the Arrangements wizard (version 8.0 and later).

To add or modify a credit card type code

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.
2. In the Navigation pane, do one of the following:
   - To add a credit card type code, right-click the Credit Card Types folder and then click New Credit Card Type. The Credit Card Type Properties dialog box appears without any values.
   - To modify a credit card type code, right-click the credit card type code and then click Properties. The Credit Card Type Properties dialog box appears with the current values.

3. Complete the information and then click OK.

Crystal Reports

Crystal Reports

Use the Latitude Maintenance window to search for or delete Crystal Reports. You can also export one or more Crystal Reports from Latitude, or import new or modified Crystal Reports into Latitude. Latitude includes all standard reports stored in the database as *.rpt files.

Import a New Report

Use the Import Crystal Report dialog box to import a new Crystal Report.
To import a new report

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.

2. In the **Navigation** pane, double-click the **Crystal Reports** folder, or right-click the **Crystal Reports** folder and then click **Import Single Report**. The **Import Crystal Report** dialog box appears.

3. Select the report and then click **Open**. The system imports the report.

**Import a Modified Report from the Navigation Pane**

Use the **Import Crystal Report** dialog box to import a modified Crystal Report from the **Navigation** pane.

**To import a modified report from the Navigation pane**

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.

2. In the **Navigation** pane, right-click the **Crystal Reports** folder and then click **Import Single Report**. The **Import Crystal Report** dialog box appears.
3. Select the report and then click **Open**. The **Confirm File Replace** dialog box appears.

4. Click **Yes**. The system imports the report.

**Import a Modified Report From the Information Pane**

Use the **Import Crystal Report** dialog box to import a modified Crystal Report from the **Information** pane.

**To import a modified report from the Information pane**

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.

2. In the **Navigation** pane, click the **Crystal Reports** folder and then, in the **Information** pane, double-click the report to import. The **Crystal Report Properties** dialog box appears.

3. Click **Import**. The **Import Crystal Report** dialog box appears.
4. Select the report and then click **Open**. The **Confirm File Replace** dialog box appears.
5. Click **Yes**. The system imports the report.

**Import a Group of Reports**

Use the **Browse for Folder** dialog box to import a group of Crystal Reports.

**To import a group of reports**

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.

2. In the **Navigation** pane, double-click the **Crystal Reports** folder, or right-click the **Crystal Reports** folder and then click **Import Single Report**. The **Browse for Folder** dialog box appears.

3. Select the folder where your organization saved the reports and then click **OK**. The system imports the report.

**Add a Custom Report to the Reports Menu**

Use the **Crystal Report Properties** dialog box to add a custom report to the **Reports** menu.

**To add a custom report to the Reports menu**

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.

2. In the **Navigation** pane, click the **Crystal Reports** folder and then, in the **Information** pane, double-click the report. The **Crystal Report Properties** dialog box appears.
3. Select the **Custom Report** check box and then click **OK**. The system adds the report to the **Reports > Custom** menu. For more information, see Custom Reports.

**Export a Report**

Use the **Export Crystal Report To** dialog box to export a Crystal Report.

**To export a report**

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.

2. In the **Navigation** pane of the **Latitude Maintenance** window, click the **Crystal Reports** folder.

3. In the **Information** pane, right-click the report to export and then click **Export**. The **Export Crystal Report To** dialog box appears.
4. Click **Save**. The **Confirm Save As** dialog box appears.

5. Click **Yes**. The system exports the report.

**Customers**

Use the **Latitude Maintenance** window to search for or delete customers. Use the **Customer Properties** dialog box to add or modify customers. You can also add customers to and remove customers from a parent customer.

**Note:** The **Credit Bureau** tab no longer exists in the **Customer Properties** dialog box. To create default settings, class of business settings, or specific customer settings, use Credit Bureau Reporting Console.

**Search for a Customer**

Use the **Latitude Maintenance** window to search for a customer.

**To search for a customer**

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.

2. In the **Navigation** pane, click the **Customers** folder.
3. In the **Information** pane, type search criteria into one or more boxes and then click **Find Now**. All records that match the search criteria appear beneath the search criteria.

The following example shows the search results for all customers who have a portion of their name that starts with "de."

![Search Results Screenshot]

**Maintain a Customer**

**Maintain a Customer**

Use the **Customer Properties** dialog box to add or modify customers. You can specify general information, account information, fees, invoice settings, services, desk distributions, comments, and custom information.

**Maintain General Customer Information**

Use the **General** tab in the **Customer Properties** dialog box to maintain general information for a customer.

**To maintain general customer information**

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.

2. In the **Navigation** pane, click the **Customers** folder.

3. Do one of the following:
   - To add a customer, in the **Navigation** pane, double-click the **Customers** folder, or right-click the **Customers** folder and then click **New Customer**.
   - To modify a customer, in the **Information** pane, double-click the customer, or right-click the customer and then click **Properties**.

   The **Customer Properties** dialog box appears.

4. Click the **General** tab.
**Code:** Numeric code that Latitude assigns to the customer automatically. You can modify the number but it must be unique for each customer.

**Status:** Status of the account.

**Alpha Code:** Generic code used for conversions from other systems. Allows your agency to reference by any code previously associated to the customer.

**Default Interest:** Interest rate to assign to new accounts imported for this customer. You can override the rate in Exchange or using manual new business entry.

**Priority:** Sets the priority when spreading payments across linked accounts. Generally, you use values 1-10 (with 10 being the highest priority). You can assign customers the same priority. Maximum settings allow up to 255 priorities.

5. Complete the information and then click **OK**.

**Maintain Customer Account Information**

Use the **Account** tab in the **Customer Properties** dialog box to maintain customer account information.

**To maintain customer account information**

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.

2. In the **Navigation** pane, click the **Customers** folder.
3. Do one of the following:
   - To add a customer, in the Navigation pane, double-click the Customers folder, or right-click the Customers folder and then click New Customer.
   - To modify a customer, in the Information pane, double-click the customer, or right-click the customer and then click Properties.

The Customer Properties dialog box appears.

4. Click the Account tab.

Account Structure: Determines how to structure debtor accounts for this customer. You can only select one option for the customer (and cannot modify it later). The first option is for standard accounts broken down into money buckets that your agency defines. The second option is for POD accounts that use the ‘particulars of debt’ structure, which contain one or more invoices indicating debt segments of principle balances.

First Letter: First letter to generate for new accounts. Use Letter Console to create, modify, and send letters.

Letter Pool: Click to select the first letter. For a letter to appear for selection, in Letter Console, set the time restriction for the letter to either "Allow Always" or "Only Allow in First 30 Days."

Letter Delivery Method: Preferred method for delivering letters to the customer.

Bank: If your agency prints checks for the customer using Latitude, this value is the trust account your agency uses for this customer. Use the Invoices add-on module to set up trust accounts and print checks.

Salesman: Salesman handling this customer account. Use the Salesman folder within the Maintenance window to add salesmen for your agency.
**Class of Business:** Class of business to assign to this customer account. Use the **Class of Business** folder within the **Maintenance** window to add new class categories for your agency.

**CBR Setup:** Credit Bureau Reporting method.

**Is Principle Customer:** If selected, this customer record holds accounts that your agency owns, as opposed to accounts your agency holds for collection purposes only.

**Acknowledge new placements:** If selected, the system includes this customer's accounts when generating acknowledgment reports for all customers.

5. Complete the information and then click **OK**.

**Maintain Customer Fees**

Use the **Fees** tab in the **Customer Properties** dialog box to maintain customer fees.

**To maintain customer fees**

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.

2. In the **Navigation** pane, click the **Customers** folder.

3. Do one of the following:
   - To add a customer, in the **Navigation** pane, double-click the **Customers** folder, or right-click the **Customers** folder and then click **New Customer**.
   - To modify a customer, in the **Information** pane, double-click the customer, or right-click the customer and then click **Properties**.

The **Customer Properties** dialog box appears.

4. Click the **Fees** tab.
**Use Fee Schedule:** Customer's fee schedule to use.

**Legal Fee Schedule:** Legal fee schedule to use for accounts assigned to an attorney/forwarder.

**Collector Fee Schedule:** Fee to display to users who do not have permissions to view fees.

**Collection Cost %:** Percent to add to accounts for collection costs.

**Money Bucket:** Money bucket for collection cost. The system can calculate the collection cost percentage automatically and add it to the bucket when you add accounts manually.

**Note:** When using ImportExcel for new business, use Collection Charge to add this amount.

**Free Demand Days:** Number of "grace" days granted to a customer when a customer receives new business.

**Applies to PU, PC, and PA:** If you select a payment type, the system doesn't apply fees to that payment type for the number of Free Demand Days specified.

**Blanket SIF %:** Percentage the customer requires to consider a debtor account as settled in full.

**Fee Cap %** and **Fee Cap $:** Fee caps cause fees to stop applying to applicable buckets after reaching the fee cap. Select the check box to set and apply a Fee Cap % or Fee Cap $ amount.

**Note:** If you specify a Fee Cap % and a Fee Cap $ amount, or the account’s fee schedule has a Fee Cap, the fee cap falls to the lowest cap amount. Fee caps cause fees to stop applying to the principal bucket after reaching the fee cap. If the customer has a fee cap amount (see the Fees tab on the Customer Properties dialog box), the system applies the lower of the two amounts toward an individual account.

5. To select the fee schedule to use, do the following:
   a. Click **Select** next to **Use Fee Schedule**. The Fee Schedules window appears.
   b. In the **Select Fee Schedule** list box, click the fee schedule and then click **Save**.

6. To select the legal fee schedule to use, do the following:
   a. Click **Select** next to **Use Fee Schedule**. The Fee Schedules window appears.
   b. In the **Select Fee Schedule** list box, click the fee schedule and then click **Save**.

7. To select the collector fee schedule to use, do the following:
   a. Click **Select** next to **Use Fee Schedule**. The Fee Schedules window appears.
   b. In the **Select Fee Schedule** list box, click the fee schedule and then click **Save**.

8. Complete the remaining information and then click **OK**.

**Maintain Customer Invoice Settings**

Use the Invoice tab in the Customer Properties dialog box to maintain invoice settings for a customer.

**To maintain customer invoice settings**

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.
2. In the Navigation pane, click the Customers folder.
3. Do one of the following:
   - To add a customer, in the **Navigation** pane, double-click the **Customers** folder, or right-click the **Customers** folder and then click **New Customer**.
   - To modify a customer, in the **Information** pane, double-click the customer, or right-click the customer and then click **Properties**.

The **Customer Properties** dialog box appears.

4. Click the **Invoice** tab.

![Image of Customer Properties dialog box]

**Parent Customer:** If you bill the customer as part of a parent company, click the folder to select a customer group.

**Invoice Type:** Determines how to invoice payment types.

- **Combined:** Creates one invoice for all payment types (PA, PC, PU, PAR, PCR, and PUR).
- **Separate:** Creates one invoice for PC and PCR, one invoice for PA and PU, and one invoice for PAR and PUR payment types.
- **Separate Direct:** Creates one invoice for PC and PCR payment types and a separate invoice for PA, PAR, PU, and PUR payment types.

**Invoice Frequency:** Determines how often to send invoices to the customer.

**Invoice Method:** Method for invoicing the customer.

- **Net:** Subtracts your fee from the customer invoice. Customer invoices exclude your agency’s fee.
- **Gross:** Sends customer invoices with all monies included. The customer pays your fee based on the invoice information.
Invoice Sort: Order to sort the invoices.

Remit Method: Determines how to remit invoices.
- Manual: Your agency manually generates checks for the customer.
- Check: Your agency uses Latitude Invoices to print checks for the customer.
- ACH Transfer: Your agency uses Latitude Invoices to create ACH wire transfers for the customer.

Number of days to allow payments to clear before including on invoice: Number of days to wait before including debtor payments on a customer invoice. Use this option to avoid sending payment information to a customer when the debtor’s check does not clear.

Show [check boxes]: If selected, the corresponding information prints on the customer's invoices.

Invoice Report: Crystal Reports file to use when creating invoices for the customer. This option allows you to use custom invoices for each customer. The default file is BasicInvoice.rpt. Import the reports into Latitude to make them available for selection from the list box.

5. Complete the information and then click OK.

Maintain Customer Services

Use the Services tab in the Customer Properties dialog box to maintain services for a customer.

To maintain customer services

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.
2. In the Navigation pane, click the Customers folder.
3. Do one of the following:
   - To add a customer, in the Navigation pane, double-click the Customers folder, or right-click the Customers folder and then click New Customer.
   - To modify a customer, in the Information pane, double-click the customer, or right-click the customer and then click Properties.

   The Customer Properties dialog box appears.
4. Click the Services tab.
5. Select the services that are available to the customer and clear the services that are no longer available to the customer.

6. Click the **Sweep** tab.

**Enable Sweep:** If selected, allows you to move certain accounts to a specified desk or queue.

**Sweep days:** Number of days old to require an account before sweeping the account.

**Sweep days paid:** Number of days past the payment date to begin the sweep.
Sweep minimum balance: Minimum balance allowed on accounts that the system sweeps into the desk (queue).

Sweep desk: Desk (queue) that holds all swept accounts.

7. Complete the information and then click OK.

Maintain Customer Information

Use the Info tab in the Customer Properties dialog box to maintain customer information. The information you type in these boxes displays to collectors when working an account. You can type an unlimited amount of free-form text into these boxes.

To maintain customer information

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.

2. In the Navigation pane, click the Customers folder.

3. Do one of the following:
   - To add a customer, in the Navigation pane, double-click the Customers folder, or right-click the Customers folder and then click New Customer.
   - To modify a customer, in the Information pane, double-click the customer, or right-click the customer and then click Properties.

The Customer Properties dialog box appears.

4. Click the Info tab.

![Customer Properties Dialog Box](image)

**Work Plan Info:** Displays information on how to work the account. You can access this information from Info menu in the Work Form.
Settlement Info: Displays information on how to settle the account. You can access this information from Info menu in the Work Form and when creating or modifying a payment or promise.

Misc. Info: Display miscellaneous information to collectors, such as special customer requirements. You can access this information from Info menu in the Work Form.

5. Complete the information and then click OK.

Desk Distributions

Desk Distributions

Use the Desk Distribution tab in the Customer Properties dialog box to set up desks to hold accounts to disburse using the Desk Mover tool. You can distribute customer accounts to multiple desks, based on the State (address) and account balance. You can add multiple desks to a customer account, based on the State (address) and account balance.

| Note: You can only select inventory desks on the Desk Distribution tab. Use the Account Mover tool to distribute accounts to collectors or other personnel. |

To add, modify, or delete a customer comment

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.

2. In the Navigation pane, click the Customers folder.

3. Do one of the following:
   - To add a customer, in the Navigation pane, double-click the Customers folder, or right-click the Customers folder and then click New Customer.
   - To modify a customer, in the Information pane, double-click the customer, or right-click the customer and then click Properties.

   The Customer Properties dialog box appears.

4. Click the Desk Distribution tab.
5. To add a desk distribution, do the following:
   a. In the Default Desk list box, click the default inventory desk to receive the customer’s accounts.
   b. Click the New icon . The Latitude - Desk Distribution Detail Properties dialog box appears.
   c. In the State list box, click a state.
   d. Type a range for account balances and then, in the Desk list box, click the desk to receive the accounts.
e. To activate the next line for further account distribution, click **Off/On** and repeat the previous step. You can modify the balance ranges on any active line.

f. When finished, click **OK**.

6. To modify a desk distribution, do the following:
   
a. To modify the default desk, in the **Default Desk** list box, click the default inventory desk to receive the customer’s accounts.

b. In the data grid, click the desk and then click the Open icon 📊. The **Latitude - Desk Distribution Detail Properties** dialog box appears.

![Latitude - Desk Distribution Detail Properties](image)

   c. Modify the assignment and then click **OK**.

7. To remove a state from a desk distribution, click the state and then click the Delete icon ✗. A confirmation dialog box appears. Click **Yes**.

8. To remove a desk from a desk distribution, in the data grid, click the desk and then click the Delete icon ✗. A confirmation dialog box appears. Click **Yes**.

9. On the **Desk Distribution** tab, click **OK**.

**Customer Comments**

Customer Comments

Use the **Comments** tab in the **Customer Properties** dialog box to add and view comments regarding changes to the information on the tabs in the **Customer Properties** dialog box. The system creates the comments for changes made to customer information and marks the comments as "Created by AUDIT." The most recent comment appears first in the data grid.

**Note:** Only administrators can delete a comment that a user created. Users and administrators cannot delete system-generated comments.
You can also view these customer comments in the **Work Form**. For more information, see View Customer Notes.

**To add, modify, or delete a customer comment**

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.

2. In the **Navigation** pane, click the **Customers** folder.

3. Do one of the following:
   - To add a customer, in the **Navigation** pane, double-click the **Customers** folder, or right-click the **Customers** folder and then click **New Customer**.
   - To modify a customer, in the **Information** pane, double-click the customer, or right-click the customer and then click **Properties**.

   The **Customer Properties** dialog box appears.

4. Click the **Comments** tab.

5. Do one of the following:
   - To add a comment, click the **New** icon . The **Latitude: Add Customer Comment** dialog box appears. Add a comment and then click **OK**.
To modify a comment, in the data grid, click the comment and then click the Open icon. The **Latitude: View Comment** dialog box appears. Modify the comment and then click **OK**.

To delete a comment, in the data grid, click the comment and then click the Delete icon. A confirmation dialog box appears. Click **Yes**.

6. On the **Comments** tab, click **OK**.
**Maintain Custom Data**

Use the **Custom** tab in the **Customer Properties** dialog box to add or modify custom data.

If you set up custom labels in the **Control File Properties** dialog box, you can do the following on the **Custom** tab:

- Add or modify up to nine pre-defined dates (in MM/DD/CCYY format).
- Select up to nine pre-defined check box options
- Add or modify up to nine pre-defined numeric values
- Add or modify up to five pre-defined alphanumeric values (for example, numbers, letters, characters)

Data on the **Text** tab is available for selection when using Letter Console to create merge letters.

**To maintain custom data**

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.

2. In the **Navigation** pane, click the **Customers** folder.

3. Do one of the following:
   - To add a customer, in the **Navigation** pane, double-click the **Customers** folder, or right-click the **Customers** folder and then click **New Customer**.
   - To modify a customer, in the **Information** pane, double-click the customer, or right-click the customer and then click **Properties**.

   The **Customer Properties** dialog box appears.

4. Click the **Custom** tab

5. To add custom dates, do the following:
   a. Click the **Dates** tab. The following example shows a custom label for "Contract Date."
b. In the **Date1** box, type a date and then click **Apply**.

6. To select up to nine pre-defined check box options, do the following:

   a. Click the **Options** tab. The following example shows a custom label for "Filed Bankruptcy."

   b. In the **Option1** check box, select the check box to indicate a true statement or clear the check box to indicate a false statement and then click **Apply**.
7. To add or modify up to nine pre-defined numeric values, do the following:
   a. Click the **Values** tab. The following example shows a custom label for "Number of Bankruptcies Filed."

   ![Image of Latitude - Customer Properties: New Customer window]

   b. In the **Value1** box, type a numeric value and then click **Apply**.

8. To add or modify up to five pre-defined alphanumeric values, do the following:
   a. Click the **Custom** tab and then click the **Text** tab. The following example shows a custom label for "Bankruptcy Status."
b. In the **Text1** box, type an alphanumeric value and then click **Apply**.

9. Click **OK**.

**Copy a Customer**

Use the **Customer Properties** dialog box to copy properties from an existing customer record to set up a new customer record.

**To copy a customer**

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.

2. In the **Navigation** pane, right-click the **Customers** folder and then click **New Customer from Existing**. The **Select a Customer** dialog box appears.
3. Click the customer to copy and then click OK. The **Latitude - Customer Properties** dialog box appears.

4. Modify the information and then click **OK**.

**Delete a Customer**

Use the **Customer Properties** dialog box to delete a customer. Only Administrators can delete customers.

**To delete a customer**

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.

2. In the **Navigation** pane, click the **Customers** folder.

3. Do the steps to **Search for a Customer**.
4. In the **Information** pane, in the search results, right-click the record and then click **Delete**. A confirmation dialog box appears.

5. Click **Yes**.

**Assign a Customer to a parent Customer**

Use the **Customer Properties** dialog box to assign a customer to a parent customer. Use parent customers to combine invoices for multiple customers under one invoice. For example, your agency can hold accounts for a major company that has several subsidiaries. Assign the subsidiary name to the account and reference it when working those debtor accounts. You can "roll up" invoicing to the parent company by assigning the subsidiaries to the parent customer account.

**Important!** Once you assign customers to a parent customer, you can no longer invoice the customers separately. To create the invoices, select the parent customer.

**To assign a customer to a parent customer**

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.

2. In the **Navigation** pane, click the **Customers** folder.

3. Do the steps to **Search for a Customer** to locate and open the parent customer record.

4. Click the **Invoice** tab. The system sets the **Parent Customer** to "None."

5. Click the **Open** icon 📄. The **Customer Groups** dialog box appears.
6. In the **Parent Customer** list box, click the parent customer.

7. In the **Available Customers** list box, click the customer to add to the parent customer and then click the right arrow to move the customer to the **Members** list box.

8. Repeat the previous step to add any additional customers to the parent customer and then click **OK**.

**Remove a Customer from a Parent Customer**

Use the **Customer Properties** dialog box to remove a customer from a parent customer. Use parent customers to combine invoices for multiple customers under one invoice. To invoice a subsidiary (child) customer separately, remove the customer from the parent customer group.

**To remove a customer from a parent customer**

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.
2. In the **Navigation** pane, click the **Customers** folder.
3. Do the steps to [Search for a Customer](#) to locate and open the parent customer record.
4. Click the **Invoice** tab.
5. Click the Open icon 📏. The **Customer Groups** dialog box appears.
6. In the **Members** list box, click the customer to remove and then click the left arrow to move the customer to the **Available Customers** list box.

7. Repeat the previous step to remove any additional customers and then click **OK**.

**Debtor Asset Type Codes**

**Debtor Asset Type Codes**

Use the **Latitude Maintenance** window to search for or delete debtor asset type codes. Use the **Debtor Asset Type Properties** dialog box to add or modify debtor asset type codes. Asset types are available on the **Assets** tab of the **More Info** window accessed from the **Work Form**.

**To add or modify a debtor asset type code**

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.

2. In the **Navigation** pane, do one of the following:
   - To add a debtor asset type code, right-click the **Debtor Asset Type** folder and then click **New Debtor Asset Type**. The **Debtor Asset Type Properties** dialog box appears without any values.
   - To modify a debtor asset type code, right-click the debtor asset type code and then click **Properties**. The **Debtor Asset Type Properties** dialog box appears with the current values.

3. Complete the information and then click **OK**.
Latitude Printable Help for Administrators

**Department Codes**

**Department Codes**

Use the **Latitude Maintenance** window to search for or delete department codes. Use the **Department Properties** dialog box to add or modify department codes. Assign departments to a specific branch and use the departments to define permissions and as a category within the Management Dashboard.

**To add or modify a department code**

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.

2. In the **Navigation** pane, do one of the following:
   - To add a department code, right-click the **Department** folder and then click **New Department**. The **Department Properties** dialog box appears without any values.
   - To modify a department code, right-click the department code and then click **Properties**. The **Department Properties** dialog box appears with the current values.

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

**Desk Codes**

**Desk Codes**

Use the **Latitude Maintenance** window to search for, copy, or delete desks, and reset credit bureau request limits. Use the **Desk Properties** dialog box to add or modify desks. You assign users to desks and then assign desks to accounts. Users assigned to the desks work the accounts assigned to the desks.

**Add or modify a desk code**

**To add or modify a desk code**

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.

2. In the **Navigation** pane, do one of the following:
   - To add a desk code, right-click the **Desk** folder and then click **New Desk**. The **Desk Properties** dialog box appears without any values.
   - To modify a desk code, right-click the desk code and then click **Properties**. The **Desk Properties** dialog box appears with the current values.
**Code**: Unique code that identifies the desk.

**Name**: Name of the desk.

**Team**: Used to determine the department and branch assigned to the desk.

**Desk Type**: The type of desk assigned is for information purposes only unless you create the desk as an inventory type. Inventory desks are for receiving new business for the agency. Once you import accounts or assign them to the inventory desk, you can distribute them to collectors using the Account Mover tool. Valid values are:

- **Administrator**: Not used
- **Clerical**: Not used
- **Supervisor**: Not used
- **AIM**: Used only for holding accounts forwarded to outside agencies using the add-on Agency Interface Module (AIM).
- **Collector**: Holds accounts for a particular user or collector.
- **Inventory**: Repository for new accounts, used when importing new business. Once you import accounts to an inventory desk, you can distribute them to collector desks using the Desk Mover tool.

**General tab**

- **Alias**: Collector name inserted in letters where you insert the Alias merge field.
- **Extension**: Phone extension used for collector inserted in letters where you insert the Extension merge field.
- **Email**: Email address for the collector inserted in letters where you insert the Email merge field.
Include this desk in queue report: If selected, includes account information for the desk on the Collector Queue and Monthly Collections reports.

Allow accounts in this desk to be linked: If selected, the desk does not allow you to link accounts assigned to it to other accounts. This option only applies when importing accounts linked automatically using Link Console. Manual data entry does not respect the "no link to desk" rule.

Unlimited: If selected, you can assign an unlimited number of accounts to a desk.

Set Limit: If selected, type the maximum number of accounts that you can assign to a desk.

Work Flow tab

Accounts should be worked every __ days: Number of days an account is idle before the system prompts you to work it again while assigned to the desk. Follow-up date defaults this number of days ahead automatically. After reaching the maximum days, the system bumps it to the next day.

Work new business for __ days: Number of days to work new business while assigned to the desk. Once you work the new business for this number of days, the system moves it to the 0-30 day queue (020).

Daily Work Limit: Number of accounts the desk can set for follow-up work for any 24 hour period.

Maximum days for future reminders: Maximum number of days ahead a user can set a reminder for an account assigned to this desk.

Maximum days for future follow-up: Maximum number of days ahead a user can set a follow-up date for an account assigned to this desk.

Credit Bureau tab

Monthly Limit: Maximum number of credit bureau reports the desk can request per month. You cannot set this number higher than 32,000.

Requests Remaining: For a new desk, the number of requests allowed for the desk for the rest of the current month. For example, if the monthly limit is "50" and the desk has already requested "20" reports this month, type "30" in this box. The system tracks this number after creating the desk. You can reset Credit Bureau Reporting for all desks manually at any time. See Reset Credit Bureau Request Limits.

Min Balance: Minimum balance a debtor holds that allows the desk to send a credit report request.

Goals tab

Monthly Goal (1): Number of credit bureau reports the desk strives to attain each month.

Monthly Goal (2): Number of credit bureau reports the desk strives to attain each alternative month.

Special (1): Number of special request goals for the desk.

Special (2): Number of special request goals for the desk.
**Special (3):** Number of special request goals for the desk.

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

**Reset credit bureau request limits**

Use the **Latitude Maintenance** window to reset the number of credit bureau requests remaining for each desk to the maximum allowed at any time. Latitude resets the number of credit requests remaining for each desk to the maximum allowed number for each new month so this option allows you to reset the limit.

**To reset credit bureau request limits**

1. In the **Navigation** pane, right-click the **Desk** folder and then click **Reset CBR Limits**. The **Reset Desk CBR Limits** dialog box appears.

2. Click **Yes**.

**Copy a desk code**

You can copy properties from an existing desk to create a desk.

**To copy a desk code**

1. In the **Navigation** pane, right-click the **Desk** folder and then click **New Desk from Existing**. The **Select a Desk** dialog box appears.

2. Click the desk code to copy and then click **OK**. The **Desk Properties: New Desk** dialog box appears.

3. Modify the information and then click **OK**.

**Extra Data Codes**

- Extra Data Codes
Use the Latitude Maintenance window to search for or delete extra data codes. Use the Extra Data Properties dialog box to add or modify extra data codes. A major strength of Latitude is the ability to create custom user fields, which you assign as Extra Data. You can add extra data codes to the Work Form to hold extra information based on your agency’s criteria.

To add or modify an extra data code

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.
2. In the Navigation pane, do one of the following:
   • To add an extra data code, right-click the Extra Data folder and then click New Extra Data. The Extra Data Properties dialog box appears without any values.
   • To modify an extra data code, right-click the extra data code and then click Properties. The Extra Data Properties dialog box appears with the current values.

### Extra Data Code
- **Extra Data Code**: Unique two-character code that identifies the extra data.

### Description
- **Description**: Description that appears next to the extra data code when adding extra data to a debtor Work Form.

### Lines 1 through 5
- **Lines 1 through 5**: You can assign up to five lines of information to associate to the code. Provide a title for the information and text that displays when a user mouse’s over the title.

3. Complete the information and then click OK.

### Fee Schedule Codes

#### Fee Schedule Codes

Use the Latitude Maintenance window to search for or delete fee schedule codes. Use the Fee Schedules dialog box to add or modify fee schedule codes. You can set up fee schedules to establish fee rates that your agency uses. Fee rates have a unique numeric code for selection.

#### Add a Fee Schedule Code

Use the Fee Schedules dialog box to add a fee schedule code.
To add a fee schedule code

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.

2. In the **Navigation** pane, click the **Fee Schedules** folder.

3. In the **Information** pane, double-click a fee schedule. The **Fee Schedules** dialog box appears.

4. Click **New**. The **Create New Fee Schedule** dialog box appears. The information displayed depends on whether the fee is **Age Based**, **Balance Based** or **Liquidation Based**. For information about fee schedules, see **Fee Code Schedule - Age Based**, **Fee Code Schedule - Balance Based**, or **Fee Code Schedule - Liquidation Based**.
Fee Schedule Code: Unique number that identifies the fee schedule. The system assigns this number.

Fee Schedule Name: 30-character maximum description of the fee schedule to assist during fee selection for an account or client.

Fee Schedule Type: Used to calculate how to add fees to the account. If you selected Age Based, specify the date range to use to calculate the fee.

From Date

Received Date: Calculate fees starting on the date you placed the debtor account.

Client DLP: Calculate fees starting on the date of the last payment made to the client.

Client DLC: Calculate fees starting on the date of the last charge made to the account.

Our DLP: Calculate fees starting on the date of the last payment made to your organization.

[Blank]: Calculate fees starting from a user-defined date. These options represent the user-defined date fields from your organization's control file. The option names are based on how you set up your control file.

To Date

Entered Date: Calculate fees up to the payment entry date.
**Received Date:** Calculate fees up to the date you placed the account.

**Client DLP:** Calculate fees up to the date of the last payment made to the client.

**Client DLC:** Calculate fees up to the date of the last charge made to the account.

**Our DLP:** Calculate fees up to the date of the last payment made to your organization.

**[Blank]:** Calculate fees up to the user-defined date. These options represent the user-defined date fields from your organization’s control file. The option names are based on how you set up your control file.

5. Complete the information and then click **OK**. The Fee Schedules dialog box appears.

6. Complete the information and then click **OK**.

**Modify a Fee Schedule Code**

Use the Fee Schedules dialog box to modify a fee schedule code.

**To modify a fee schedule code**

1. In the Main Menu window, from the Maintenance menu, click **System Codes and Settings**. The Latitude Maintenance window appears.

2. In the Navigation pane, click the Fee Schedules folder.

3. In the Information pane, double-click a fee schedule code. The Fee Schedules dialog box appears.

4. Modify the information and then click **OK/Exit**.

**Fee Code Schedule – Age Based**

Accounts set up with age-based fee schedules accumulate collection fees based on an account date range. Calculations increase or decrease percentages charged for collections on debtor accounts at specified aging intervals. For example, you can set a certain percentage of the amounts collected to charge for the first 30 days of holding the account, while setting another percentage to use for the next 30-60 days.
Once you create the fee schedule, you can modify the schedule used to calculate fees for debtor payments. For more information about creating fee schedules, and viewing and modifying fee codes, see Fee Schedules Maintenance.

Select Fee Schedule: Fee schedule to use.

New: Opens the Fee Schedules dialog box to allow you to add a fee schedule code. For more information, see Add a Fee Schedule Code.

From: Date to use to start calculating fees.

- Received Date: Calculate fees starting on the account placement date.
- Client DLP: Calculate fees starting on the date of the last payment made to the client.
- Client DLC: Calculate fees starting on the date of the last charge made to the account.
- Our DLP: Calculate fees starting on the date of the last payment made to your organization.
- [Blank]: Calculate fees starting from a user-defined date. These three options represent the user-defined values from your organization's control file.

To: Date to use to stop calculating fees.

- Entered Date: Calculate fees up to the payment entry date.
- Received Date: Calculate fees up to the account placement date.
- Client DLP: Calculate fees up to the date of the last payment made to the client.
- Client DLC: Calculate fees up to the date of the last charge made to the account.
- Our DLP: Calculate fees up to the date of the last payment made to your organization.
- [Blank]: Calculate fees up to the user-defined date. These three options represent the user defined date fields from your organization's control file. The option names are based on how your control file is set up.

Fee Cap Percent: Percent of the original balance at which to stop applying fees to the principal bucket once you recover that amount.
**Fee Cap Amount**: Amount of the original balance at which to stop applying fees to the principal bucket once you recover that amount.

**Note**: If the customer has a fee cap amount (see the Fees tab on the Customer Properties dialog box), the system uses the lesser of the two fee cap amounts.

**Money Buckets**: List of money buckets set up for your agency. These buckets group dollar amounts associated to an account (for example, principal, interest, collection costs).

**Alloc%**: Percentage of the payment amount, or remaining payment amount in the case that the system allocates other buckets first, to allocate toward collection costs for each money bucket.

**Invoice PU**: If selected, the system includes on the customer's invoice payments that debtors send to your organization.

**Invoice PC**: If selected, the system includes on the customer's invoice payments that debtors send to your organization for accounts that an outside collection agency or attorney holds.

**Invoice PA**: If selected, the system includes on the customer's invoice payments that debtors send to outside collection agencies or attorneys that hold the accounts.

**Apply Priority**: Determines the order in which to apply payments. The system applies payments received to the money bucket with a priority of "1" first and subsequent buckets in numerical order.

**To**: The first To column is always active, and indicates the first (or only) date range to use for the specified fee. For example, if the fee is based on the Received Date and Payment Entry date and the range is 0 to 29, the fees apply during the first thirty (30) days that your agency holds the account. If this fee is the only fee that applies, accept the default of 0 to 100000000 (no other fee schedule columns are active).

**Off/On**: Turns on or off the ability to set up a subsequent column of fees to apply. To set up more fees, click Off/On and specify the next range of days to use for applying fees. Based on the To example, the next date range starts at 30.

**Percent**: Percentage to use as the fee for each money bucket for each active date range column. For example, if you specify 50%, all payments received that apply toward the Principal and Interest buckets generate an agency fee of 50% of the money collected.

**Fee Code Schedule – Balance Based**

Accounts set up with balance-based (dollar) fee schedules accumulate collection fees based on account balances. For example, you can set a certain percentage to charge for accounts with a balance of $1,000, while setting another percentage to use for accounts with balances greater than $1,000 but less than $1,500.

Once you create the fee schedule, you can add or modify the schedule used to calculate fees for debtor payments. For more information about creating fee schedules, and viewing and modifying fee codes, see Fee Schedules Maintenance.
Select Fee Schedule: Fee schedule to use.

New: Opens the Fee Schedules dialog box to allow you to add a fee schedule code. For more information, see Add a Fee Schedule Code.

Fee Cap Percent: Percent of the original balance at which to stop applying fees to the principal bucket once you recover that amount.

Fee Cap Amount: Amount of the original balance at which to stop applying fees to the principal bucket once you recover that amount.

**Note:** If the customer has a fee cap amount (see the Fees tab on the Customer Properties dialog box), the system uses the lesser of the two fee cap amounts.

|MONEY BUCKETS| List of money buckets set up for your agency. These buckets group dollar amounts associated to an account (for example, principal, interest, collection costs).
|Alloc%| Percentage of the payment amount, or remaining payment amount in the case that the system allocates other buckets first, to allocate toward collection costs for each money bucket.

Invoice PU: If selected, the system includes on the customer's invoice payments that debtors send to your organization.

Invoice PC: If selected, the system includes on the customer's invoice payments that debtors send to your organization for accounts that an outside collection agency or attorney holds.

Invoice PA: If selected, the system includes on the customer's invoice payments that debtors send to outside collection agencies or attorneys that hold the accounts.

Apply Priority: Determines the order in which to apply payments. The system applies payments received to the money bucket with a priority of "1" first and subsequent buckets in numerical order.

To: The first To column is always active, and indicates the first (or only) dollar range to use for the specified fee. For example, if the fee is set to apply for account balances from $0 to $999.99, the fee code applies for balances up to $1000. If this fee is the only fee that applies, accept the default of 0 to 100000000 (no other fee schedule columns are active).
**Off/On**: Turns on or off the ability to set up a subsequent column of fees to apply. To set up more fees, click **Off/On** and type the next dollar range to use for applying fees. Based on the **To** example, the next dollar range starts at $1000.00.

**[Percent]**: Percentage to use as the fee for each money bucket for each active dollar range column. For example, if you specify 50%, all payments received that apply toward the **Principal** and **Interest** buckets generate an agency fee of 50% of the money collected.

**Fee Code Schedule – Liquidation Based**

Liquidation fees allow a sliding fee percentage based on the percentage paid per account. Percentages are retroactive once the next bracket is reached. For example, if an account pays 50%, the fee is 30%, but if the account pays 90% the fee increases to 40%. Multiple payments increase the fee, as the percentage paid increases and moves the account into the next fee bracket. New fee brackets are retroactively applied to increase fees on prior payments, so the total fee on the account indicates the higher fee amount.

Accounts set up with balance-based (dollar) fee schedules accumulate collection fees based on account balances. For example, you can set a certain percentage to charge for accounts with a balance of $1,000, while setting another percentage to use for accounts with balances greater than $1,000 but less than $1,500.

Once you create the fee schedule, you can add or modify the schedule used to calculate fees for debtor payments. For more information about creating fee schedules, and viewing and modifying fee codes, see **Fee Schedules Maintenance**.

**Example:**

50% paid = 30% fee and 90% paid = 40% fee, using an account where the balance is $1000.00.

1. The debtor pays $750.00 (75% of the balance) with a fee of 30% = $225.00.
2. Another payment is made for $200.00, which brings the total paid amount to $950.00, or 95% of the balance.
3. The fee is increased to 40% or $100.00 for that one payment, but that 40% also applies retroactively to previous payments.
4. An additional $75.00 fee for the $750.00 payment is added, bringing the total fee for the second payment to $175.00.

A breakdown of this example is shown below:

<table>
<thead>
<tr>
<th>Original Balance</th>
<th>Current Balance</th>
<th>Paid</th>
<th>Fee</th>
<th>Additional Fee</th>
<th>Total Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1000</td>
<td>$250</td>
<td>$750</td>
<td>$225</td>
<td>$0</td>
<td>$225</td>
</tr>
<tr>
<td>$1000</td>
<td>$50</td>
<td>$200</td>
<td>$80</td>
<td>$75</td>
<td>$380</td>
</tr>
</tbody>
</table>
Select Fee Schedule: Fee schedule to use.

New: Opens the Fee Schedules dialog box to allow you to add a fee schedule code. For more information, see Add a Fee Schedule Code.

Fee Cap Percent: Percent of the original balance at which to stop applying fees to the principal bucket once you recover that amount.

Fee Cap Amount: Amount of the original balance at which to stop applying fees to the principal bucket once you recover that amount.

**Note:** If the customer has a fee cap amount (see the Fees tab on the Customer Properties dialog box), the system uses the lesser of the two fee cap amounts.

Money Buckets: List of money buckets set up for your agency. These buckets group dollar amounts associated to an account (for example, principal, interest, collection costs).

Alloc%: Percentage of the payment amount, or remaining payment amount in the case that the system allocates other buckets first, to allocate toward collection costs for each money bucket.

Invoice PU: If selected, the system includes on the customer’s invoice payments that debtors send to your organization.

Invoice PC: If selected, the system includes on the customer’s invoice payments that debtors send to your organization for accounts that an outside collection agency or attorney holds.

Invoice PA: If selected, the system includes on the customer’s invoice payments that debtors send to outside collection agencies or attorneys that hold the accounts.

Apply Priority: Determines the order in which to apply payments. The system applies payments received to the money bucket with a priority of "1" first and subsequent buckets in numerical order.

To: The first To column is always active, and indicates the first (or only) percentage range to use for the specified fee. For example, if the fee is set to apply for percentages from 0 to 39.99, the fee code applies for total payment amounts that comprise less than 40% of the balance. If this fee is the only fee that applies while your agency holds the account, accept the default of 0 to 100000000 (no other fee schedule columns are active).
**Off/On:** Turns on or off the ability to set up a subsequent column of fees to apply. To set up more fees, click **Off/On** and type the next percentage range to use for applying fees. Based on the **To** example, the next percentage range starts at 40%.

**[Percent]:** Percentage to use as the fee for each money bucket for each active percentage column. For example, if you specify 18%, the system applies an 18% fee to accounts where all combined payments are less than 40% (based on the example for **To**) of the balance.

**Language Codes**

Use the **Latitude Maintenance** window to search for or delete language codes. Use the **Language Code Properties** dialog box to add or modify language codes. You can assign language codes in the **More Information** area of the **Work Form**. You can select or move accounts based on the assigned language code.

**To add or modify a language code**

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.

2. In the **Navigation** pane, do one of the following:
   - To add a language code, right-click the **Language Codes** folder and then click **New Language Code**. The **Language Code Properties** dialog box appears without any values.
   - To modify a language code, right-click the language code and then click **Properties**. The **Language Code Properties** dialog box appears with the current values.

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

**Law List Codes**

**Law List Codes**

Use the **Latitude Maintenance** window to search for or delete law list codes. Use the **Law List Properties** dialog box to add or modify law list codes. You can associate law list codes to attorneys.

**To add or modify a law list code**
1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.

2. In the **Navigation** pane, do one of the following:
   - To add a law list code, right-click the **Law Lists** folder and then click **New Law List**. The **Law List Properties** dialog box appears without any values.
   - To modify a law list code, right-click the law list code and then click **Properties**. The **Law List Properties** dialog box appears with the current values.

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

**Legal Ledger Type Codes**

**Legal Ledger Type Codes**

Use the **Latitude Maintenance** window to search for or delete legal ledger type codes. Use the **Legal Ledger Type** dialog box to add or modify legal ledger type codes. Legal ledger type codes are available for debits and credits in the **Accounting** tab of the **Legal View** dialog box accessed from the **Work Form**. The system migrates codes used previously upon upgrade.

**To add or modify a legal ledger type code**

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.

2. In the **Navigation** pane, do one of the following:
   - To add a legal ledger type code, right-click the **Legal Ledger Type** folder and then click **New Legal Ledger Type**. The **Legal Ledger Type** dialog box appears without any values.
   - To modify a legal ledger type code, right-click the legal ledger type code and then click **Properties**. The **Legal Ledger Type** dialog box appears with the current values.
**Is a Debit**: If selected, the system applies the transaction as a debit. If cleared, the system applies the transaction as a credit. These transactions do not apply to the Latitude balance, only reflected within the Legal Accounting tab.

**Is Invoiceable**: If selected, the system includes the billable expense in a separate Exchange/AIM Invoice client. This item does NOT appear in Latitude standard invoices.

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

**Letter Type Codes**

**Letter Type Codes**

Use the Latitude Maintenance window to search for or delete letter type codes. Use the Letter Type dialog box to add or modify letter type codes. User-defined letters have no functionality associated to them and the system has no way of determining what type of letter it is. If you need specific functionality associated to a letter, use a system-defined letter. For example, if you want to send a settlement letter, use the system-defined settlement letter.

**To add or modify a letter type code**

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.

2. In the Navigation pane, do one of the following:
   - To add a letter type code, right-click the Letter Types folder and then click New Letter Type. The Letter Type dialog box appears without any values.
   - To modify a letter type code, right-click the letter type code and then click Properties. The Letter Type dialog box appears with the current values.

![Latitude - Letter Type: Attorney Letter, Letter containing debtor information to send to your a...](image)

**Note**: For system-level letter type codes, you can modify the description but not the code.

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

**Outside Services Codes**

**Outside Services Codes**

Use the Latitude Maintenance window to search for outside services codes. Use the Service Properties dialog box to add or modify outside services codes. You send files to, and receive files from, outside services using Latitude Fusion. You cannot delete outside service codes.

**To add or modify an outside services code**

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.
2. In the Navigation pane, do one of the following:
   - To add an outside services code, right-click the Outside Services folder and then click New Service. The Service Properties dialog box appears without any values.
   - To modify an outside services code, right-click the outside service code and then click Properties. The Service Properties dialog box appears with the current values.

![Service Properties Dialog Box](image)

3. Complete the information and then click OK.

Payment Methods Codes

Payment Method Codes

Use the Latitude Maintenance window to search for or delete payment method codes. Use the Payment Method Properties dialog box to add or modify payment method codes. You assign payment method codes during payment entry in Latitude.

To add or modify a payment method code

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.
2. In the Navigation pane, do one of the following:
   - To add a payment method code, right-click the Payment Methods folder and then click New Payment Method. The Payment Method Properties dialog box appears without any values.
   - To modify a payment method code, right-click the payment method code and then click Properties. The Payment Method Properties dialog box appears with the current values.
Payment Method: Name of the payment method.

Post Dated: If selected, this payment method is for post-dated entries. You can use this payment method when adding post-dated check information for an account.

Surcharge Amount: Amount your agency adds to the debtor account for payments received using this method (not applied to MA accounts). This amount displays in the Surcharge box on the Calculate Arrangements page in the Payment Arrangements Wizard and in money bucket 10 when you add a payment.

Surcharge Percent: Percentage your agency adds to the debtor account for payments received using this method (not applied to MA accounts). The system adds this money to money bucket 10 when you add a payment.

Calculate surcharge percentage from the gross payment amount: If selected, the system calculates the surcharge percentage based on the gross payment amount.

Invoice Hold Days: Number of days to wait before posting payments received to the customer's invoice using this method.

NITD Letter Code: Notice of Intent to Deposit letter. Select a letter code to generate when adding payments for debtor accounts using this method. Use Letter Console to create, modify, and send letters.

3. Complete the information and then click OK.

Queue Level Codes

Queue Level Codes

Use the Latitude Maintenance window to search for or delete queue level codes. Use the Queue Level Properties dialog box to add or modify queue level codes. Queue level codes are three-digit numbers used to sort and prioritize accounts. Every account in your system has a queue level. Users can reassign queue levels manually or the system can change them immediately or during end-of-day processing (based on account age and other criteria). For an overview of queue levels, see Queue_Level_Overview.

Latitude releases with several standard queue level codes. For more information, see Standard Queue Levels.

To add or modify a queue level code
1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.

2. In the **Navigation** pane, do one of the following:
   - To add a queue level code, right-click the **Queue Levels** folder and then click **New Queue Level**. The **Queue Level Properties** dialog box appears without any values.
   - To modify a queue level code, right-click the queue level code and then click **Properties**. The **Queue Level Properties** dialog box appears with the current values.

   ![Queue Level Properties Dialog](image)

   **Queue Level**: Unique three-digit code that identifies the queue level.

   **Should appear in Collector's Desk queue**: If selected and the queue level is between 600-799 (clerical or supervisor), accounts assigned to these queues appear in the collector's queue. If the user has the **Accounts – Change Continue Queuing** permission, you can override this setting when assigning an account to a support queue.

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

**Queue Level Overview**

Queue levels manage workflow to ensure the most efficient routing and working of accounts. Every account in Latitude has a queue level. Queue levels change based on account activity or condition. Queue logic doesn't force a queue level change when business logic prevents it. For example, when a user creates a promise payment arrangement on the account, Latitude assigns queue level 820 (future promise). When the credit bureau returns a requested credit report for the account, the queue level remains at 820 instead of changing to 200 (returned with credit report) because the business logic has priority.

**Queue level code management**

Users with the **System Control Codes Permission** can add, modify, and delete queue level codes. The system reserves queue levels 425-499, 600-699, and 700-799 to allow you to create queues for accounts that require special attention. Though allowed, we don't recommend the following actions without consulting with Latitude by Genesys Support:

- Modifying the descriptions for system- and user-defined queue levels.
• Modifying the "should queue" setting for system- and user-defined queue levels.
• Deleting system- and user-defined queue levels.

Queue level assignment
Automated queue level assignment is based on account activity and condition. When certain events occur or conditions exist on an account, Latitude or Custodian changes the queue level accordingly. For example, when a user sets a follow-up date on an account or a supervisor dismisses an account from the Supervisor queue. Users can move accounts manually to Custom, Clerical, or Supervisor queues. For a list of queue levels and their description, see Standard Queue Levels.

Latitude updates some account queue levels immediately while others update during Custodian processing. Your organization can change the queue levels on accounts as needed using Custodian, WorkFlow, Job Manager, Exchange, or an SSIS package. For more information about Custodian; WorkFlow; Job Manager; or Exchange, see the corresponding documentation. If you need assistance, contact Latitude by Genesys Support.

Work queues
There are four work queues in Latitude that are available based on your permissions. Each queue contains accounts assigned to a specific queue level.

• **Collector queue:** Contains accounts assigned to a queue level that is less than 599.
• **Custom queue:** Contains accounts assigned to queue levels 425-499 that require a specific type of work (for example, skip tracing).
• **Clerical queue:** Contains accounts assigned to queue levels 600-699 that require clerical support (for example, verification of a direct payment).
• **Supervisor queue:** Contains accounts assigned to queue levels 700-799 that require supervisor support (for example, approval of a payment arrangement).

Queue level issues and challenges
Queue levels present certain issues and challenges. For example:

• **Workflow:** Some queue levels determine the workflow priority for presenting accounts to users in work queues. The smaller the queue level number, the higher the priority for working those accounts.
• **Work queues:** Some queue levels identify a group of accounts that require special processing, after-hours work, clerical support, or supervisor support.
• **Immediate assignment:** Latitude assigns accounts to queue levels immediately based on account activities and conditions.
• **Nightly assignment:** Custodian assigns accounts to queue levels during nightly processing when accounts qualify.
• **Planned assignment:** Your organization can change queue level assignments at any time using Custodian, WorkFlow, Job Manager, Exchange, or an SSIS package.
• **User-defined assignment:** Users can assign accounts to user-defined queue levels that define the Custom, Clerical, and Supervisor queues.
**Standard Queue Levels**

Latitude releases with several queue level codes. Most queue levels represent events or conditions that trigger a queue level change. The queue levels flagged with an asterisk (*) in the following table represent repositories for accounts that require special attention.

*Note:* The names associated to the queue levels may differ, depending on how you or Latitude by Genesys configured your system. The remaining information applies regardless of the queue level name.

<table>
<thead>
<tr>
<th>Queue Level</th>
<th>Name</th>
<th>Assignment</th>
<th>Queues for Work?</th>
<th>Reassignment</th>
</tr>
</thead>
</table>
| 000         | Reminder | Latitude assigns this queue level when a user creates a reminder or follow-up on an account.  
*Note:* If an account has a reminder set, the reminder appears for the desk at the designated date and time.  
If an account has a follow-up set, the account appears in the Work Form on the designated day when a user attempts to move to the next account in a work queue. | No               | For a follow-up, when a user works the account, Latitude reassigns the account to the queue level that applies based on account activity or condition.  
For a reminder, when a user dismisses the reminder, Latitude reassigns the account to the queue level that applies based on account activity or condition.  
*Note:* If a user doesn’t dismiss a reminder, accounts can remain at this queue level indefinitely. To avoid or correct this issue, do one of the following:  
• At the desk level, set the maximum number of days ahead that a user can set a reminder. After the number of days pass and a user hasn’t dismissed the reminder, Custodian reassigns the account to the previous queue level.  
• Use a Custodian task to identify accounts assigned to queue level 000 for more than a specific number of days. Set the task to force dismissal of the reminders and reassign the accounts to the previous queue level.  
• Use the Account Analysis tool to identify accounts assigned to queue level 000. When users...
<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Custodian Assigns This Queue Level When</th>
<th>Does Custodian Reassign the Account to the Queue Level That Applies Based on Account Activity or Condition</th>
<th>Custodian Reassigns the Account to the Queue Level That Applies Based on Account Activity or Condition</th>
</tr>
</thead>
<tbody>
<tr>
<td>010</td>
<td>Broken Promise</td>
<td>Custodian assigns this queue level when an account has a promise arrangement due on the current day but no payment posted to the account. Custodian places future payments on hold. <strong>Note:</strong> If a grace period exists for the account, Custodian delays assigning this queue level and placing payments on hold until the grace period expires without a payment posting on the account.</td>
<td>Yes</td>
<td>After a user receives a payment or negotiates a new payment arrangement, Custodian reassigns the account to the queue level that applies based on account activity or condition. Custodian also removes the hold on future payments.</td>
</tr>
<tr>
<td>011</td>
<td>No More Postdated Checks</td>
<td>Custodian assigns this queue level when an account completes a post-dated payment arrangement successfully but a balance remains on the account.</td>
<td>Yes</td>
<td>After a user negotiates a new payment arrangement or otherwise works the account, Custodian reassigns the account to the queue level that applies based on account activity or condition.</td>
</tr>
<tr>
<td>012</td>
<td>Bounced Checks</td>
<td>Custodian assigns this queue level when an account has a payment reversal because the check bounced and there are no future payments in the arrangement.</td>
<td>Yes</td>
<td>After a user receives payment or negotiates a new payment arrangement, Custodian reassigns the account to the queue level that applies based on account activity or condition.</td>
</tr>
<tr>
<td>013</td>
<td>No More Promises</td>
<td>Custodian assigns this queue level when an account completes a promise payment arrangement successfully but a balance remains on the account.</td>
<td>Yes</td>
<td>After a user negotiates a new payment arrangement, Custodian reassigns the account to the queue level that applies based on account activity or condition.</td>
</tr>
<tr>
<td>014</td>
<td>Incomplete Link Arrangement</td>
<td>Custodian assigns this queue level to the link driver account when an account in the link</td>
<td>Yes</td>
<td>Custodian reassigns the link driver account to the queue level that applies based on the account activity or condition.</td>
</tr>
<tr>
<td>Code</td>
<td>Description</td>
<td>Notes</td>
<td>User Actions</td>
<td></td>
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<td>-----------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------</td>
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<tr>
<td>015</td>
<td>New Accounts</td>
<td>Custodian assigns this queue level when you import a new account into</td>
<td>If a user accesses but doesn't work the account, Custodian reassigns the</td>
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<td></td>
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<td>Latitude that is either not a linked account or is the link driver.</td>
<td>account to queue level 016.</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>If the new account is not the link driver, Custodian assigns the</td>
<td>If a user accesses and works the account, Custodian reassigns the account</td>
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<td>account to queue level 875.</td>
<td>to queue level 599.</td>
<td></td>
</tr>
<tr>
<td>016</td>
<td>NewBiz Followup</td>
<td>Custodian assigns this queue level when a user accesses but doesn't</td>
<td>After a user works the account the same day or the set number of days</td>
<td></td>
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<td></td>
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<td>work a new account that is either not a linked account or is the link</td>
<td>allowed, Custodian reassigns the account to the queue level that applies</td>
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<td></td>
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<td>driver.</td>
<td>based on the account activity or condition.</td>
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<td><strong>Note:</strong> If your organization configured the desk to allow users to work</td>
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<td>a new account for a specific number of days, the account remains at this</td>
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<td>queue level until that time passes.</td>
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</tr>
<tr>
<td>018</td>
<td>PDC over $500</td>
<td>Latitude assigns this queue level when an account has a post-dated</td>
<td>After a user contacts the customer regarding the upcoming deduction of</td>
<td></td>
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<tr>
<td></td>
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<td>check or ACH payment arrangement with payments that are $500 or</td>
<td>funds, Custodian reassigns the account to the queue level that applies</td>
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<tr>
<td></td>
<td></td>
<td>more each.</td>
<td>based on the account activity or condition.</td>
<td></td>
</tr>
<tr>
<td>019</td>
<td>NSF Still Has PDCs on</td>
<td>Custodian assigns this queue level when an account has a payment</td>
<td>After a user receives a payment or renegotiates the payment arrangement,</td>
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<tr>
<td></td>
<td>File</td>
<td>reversal because the check bounced and there are future payments in</td>
<td>Custodian reassigns the account to the queue level that applies based on</td>
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<td>the payment arrangement.</td>
<td>account activity or condition. Custodian also removes the hold on future</td>
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<td>payments.</td>
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<tr>
<td>Code</td>
<td>Description</td>
<td>Custodian Instruction</td>
<td>Condition</td>
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<tr>
<td>020</td>
<td>Accounts 0 - 30 Days Old</td>
<td>Custodian assigns this queue level when an account has been in Latitude less than 31 days since the date received.</td>
<td>If a user works the account before 30 days pass, Custodian reassigns the account to the queue level that applies based on account activity or condition.</td>
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<td>If 30 days pass and a user hasn't worked the account, Custodian reassigns the account to queue level 030.</td>
<td></td>
</tr>
<tr>
<td>025</td>
<td>Accounts W Payment</td>
<td>No longer in use.</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>030</td>
<td>Accounts 30 – 60 Days Old</td>
<td>Custodian assigns this queue level when an account has been in Latitude between 30 and 60 days since the date received.</td>
<td>If a user works the account before 60 days pass, Custodian reassigns the account to the queue level that applies based on account activity or condition.</td>
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<td></td>
<td>If 60 days pass and a user hasn't worked the account, Custodian reassigns the account to queue level 060.</td>
<td></td>
</tr>
<tr>
<td>060</td>
<td>Accounts 60 – 90 Days Old</td>
<td>Custodian assigns this queue level when an account has been in Latitude between 60 and 90 days since the date received.</td>
<td>If a user works the account before 90 days pass, Custodian reassigns the account to the queue level that applies based on account activity or condition.</td>
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<td>If 90 days pass and a user hasn't worked the account, Custodian reassigns the account to queue level 090.</td>
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</tr>
<tr>
<td>090</td>
<td>Accounts 90 – 120 Days Old</td>
<td>Custodian assigns this queue level when an account has been in Latitude between 90 and 120 days since the date received.</td>
<td>If a user works the account before 120 days pass, Custodian reassigns the account to the queue level that applies based on account activity or condition.</td>
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<td>If 120 days pass and a user hasn't worked the account, Custodian reassigns the account to queue level 120.</td>
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</tr>
<tr>
<td>100</td>
<td>Account Reassigned</td>
<td>Custodian assigns this queue level when an account that is not new business moves from one desk to another.</td>
<td>Yes</td>
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<td></td>
<td>After a user works the account, Custodian reassigns the account to the queue level that applies based on account activity or condition. }</td>
<td></td>
</tr>
<tr>
<td>Queue Level</td>
<td>Description</td>
<td>Custodian Assignment</td>
<td>Action After Working</td>
<td>Custodian Reassignment</td>
</tr>
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</tr>
<tr>
<td>120</td>
<td>Over 120 Days Old</td>
<td>Custodian assigns this queue level when an account has been in Latitude for more than 120 days since the date received.</td>
<td>Yes</td>
<td>After a user works the account, Custodian reassigns the account to the queue level that applies based on account activity or condition.</td>
</tr>
<tr>
<td>200</td>
<td>Returned With Credit Report</td>
<td>Latitude assigns this queue level when a user receives a requested credit report and adds it to an account.</td>
<td>Yes</td>
<td>After a user updates the account to reflect the information in the credit report, Custodian reassigns the account to the queue level that applies based on account activity or condition.</td>
</tr>
<tr>
<td>400*</td>
<td>Late Night Queue EST</td>
<td>Users assign this queue level initially when an account requires after-hours follow-up. Custodian assigns this queue level when an account reaches queue level 403 without a user working it.</td>
<td>Yes</td>
<td>If a user works the account on the current day, Custodian reassigns the account to the queue level that applies based on account activity or condition. If a user doesn't work the account on the current day, Custodian reassigns the account to queue level 401.</td>
</tr>
<tr>
<td>401*</td>
<td>Late Night Queue CST</td>
<td>Custodian assigns this queue level when a user didn't work an account while it was at queue level 400.</td>
<td>Yes</td>
<td>If a user works the account on the current day, Custodian reassigns the account to the queue level that applies based on account activity or condition. If a user doesn't work the account on the current day, Custodian reassigns the account to queue level 402.</td>
</tr>
<tr>
<td>402*</td>
<td>Late Night Queue MST</td>
<td>Custodian assigns this queue level when a user didn't work an account while it was at queue level 401.</td>
<td>Yes</td>
<td>If a user works the account on the current day, Custodian reassigns the account to the queue level that applies based on account activity or condition. If a user doesn't work the account on the current day, Custodian reassigns the account to queue level 403.</td>
</tr>
<tr>
<td>403*</td>
<td>Late Night Queue PST</td>
<td>Custodian assigns this queue level when a user didn't work an account while it was at queue level 402.</td>
<td>Yes</td>
<td>If a user works the account on the current day, Custodian reassigns the account to the queue level that applies based on account activity or condition. If a user doesn't work the account on the current day, Custodian assigns the account to queue level 400.</td>
</tr>
<tr>
<td>425-499*</td>
<td>Custom Queue Levels</td>
<td>Users can assign accounts to Custom queues. Custom queues are work queues that your organization can create to hold accounts that require special follow-up work (for example, skip tracing; probate activity, bankruptcy). For more information, see Queue Levels.</td>
<td>Yes</td>
<td>After a user removes an account from a Custom queue, Custodian reassigns the account to the queue level that applies based on account activity or condition.</td>
</tr>
<tr>
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<td>-------------------------------------------------------------------------------------------------</td>
<td>-----</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>599</td>
<td>Account Worked</td>
<td>Latitude assigns this queue level when a user works an account on the current day.</td>
<td>No</td>
<td>Accounts remain at this queue level until the end of the day to ensure compliance with Federal and State collection laws. Custodian reassigns the account to the queue level that applies based on account activity or condition.</td>
</tr>
<tr>
<td>600-699*</td>
<td>Clerical Queue</td>
<td>Users and Latitude can assign accounts to Clerical queues. For example, when a user requests a letter for an account and the user doesn't have permissions to print letters, Latitude assigns the account to a Clerical queue. Clerical queues are work queues that your organization can create to hold accounts that require clerical support (for example, direct payment verification with a customer). For more information, see Queue Levels.</td>
<td>Yes</td>
<td>After a user removes an account from a Clerical queue, Custodian reassigns the account to the queue level that applies based on account activity or condition.</td>
</tr>
<tr>
<td>700-799*</td>
<td>Supervisor Queue</td>
<td>Users and Latitude can assign accounts to Supervisor queues. For example, when a user creates a payment arrangement on an account but doesn't have permissions to approve payment arrangements, Latitude assigns the account to a Supervisor queue.</td>
<td>Yes</td>
<td>After a user removes an account from a Supervisor queue, Custodian reassigns the account to the queue level that applies based on account activity or condition.</td>
</tr>
</tbody>
</table>
Supervisor queues are work queues that organization can create to hold accounts that require supervisor action (for example, payment arrangement approval). For more information, see Queue Levels.

<table>
<thead>
<tr>
<th>Code</th>
<th>Queue Description</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>800</td>
<td>Account on Hold</td>
<td>Latitude assigns this queue level when an account has a customer-level or account-level hold.</td>
<td>No</td>
</tr>
<tr>
<td>820</td>
<td>Future Promise - PPA</td>
<td>Latitude assigns this queue level when an account has a new promise payment arrangement.</td>
<td>No</td>
</tr>
<tr>
<td>830</td>
<td>Post-dated Checks Under $500</td>
<td>Latitude assigns this queue level when an account has a post-dated check or ACH payment arrangement with payments that are less than $500 each.</td>
<td>No</td>
</tr>
<tr>
<td>840</td>
<td>Post-dated Credit Card</td>
<td>Latitude assigns this queue level when an account has a post-dated credit card payment arrangement with payments that are less than $500 each.</td>
<td>No</td>
</tr>
<tr>
<td>875</td>
<td>Linked Account</td>
<td>Custodian assigns this queue level when an account is a linked account but isn't the link driver account. Users work these accounts when the link driver account queues for work.</td>
<td>No</td>
</tr>
<tr>
<td>998</td>
<td>Closed Account</td>
<td>Latitude assigns this queue level when an account has a closed status.</td>
<td>No</td>
</tr>
</tbody>
</table>
Latitude assigns this queue level when an account has a closed and returned status. If a user reopens the account, Custodian reassigns the account to the queue level that applies based on account activity or condition.

### Responsible Party Codes

**Responsible Party Codes**

Use the Latitude Maintenance window to search for or delete responsible party codes. Use the Responsible Party Properties dialog box to add or modify responsible party codes. Responsible party codes allow you to set the Relationships available for selection from the More Info dialog box in the Work Form for each debtor. The tab name for the debtor or co-debtors reflects the Relationship currently selected.

**To add or modify a responsible party code**

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.
2. In the Navigation pane, do one of the following:
   - To add a responsible party code, right-click the Responsible Party Codes folder and then click New Responsible Party. The Responsible Party Properties dialog box appears without any values.
   - To modify a responsible party code, right-click the responsible party code and then click Properties. The Responsible Party Properties dialog box appears with the current values.
3. Complete the information and then click OK.

### Result Codes

**Result Codes**

Use the Latitude Maintenance window to search for or delete result codes. Use the Result Code Properties dialog box to add or modify result codes. Result codes are up to five-character codes used to classify events. You attach result codes to notes to classify your work on an account. Latitude releases
with several standard result codes; however, your agency can customize this list. Use result codes to count the number of accounts worked and contacted by each collector.

**Note:** Certain Latitude system processes require specific result codes. See the standard result code list in the **Work Form** section for system-dependent codes.

### To add or modify a result code

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.

2. In the **Navigation** pane, do one of the following:
   - To add a result code, right-click the **Result Code** folder and then click **New Result Code**. The **Result Code Properties** dialog box appears without any values.
   - To modify a result code, right-click the result code and then click **Properties**. The **Result Code Properties** dialog box appears with the current values.

#### Result Code: Unique (up to) five-character code that identifies an event.

#### Quick Note Text: Default information to appear in the note. You can add this information to a note you create using the result code.

#### Consider As Worked: If selected, the result code counts as work on the account.

#### Consider As Contacted: If selected, the result code counts as a debtor contact.

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

### Salesman Codes

**Salesman Codes**

Use the **Latitude Maintenance** window to search for or delete salesman codes. Use the **Salesman Properties** dialog box to add or modify salesman codes. You can assign an individual salesman to each customer to track the number and dollar volume of accounts placed. You can also track the dollars collected and fees placed against accounts for each salesman in your office.

**To add or modify a salesman code**
1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.

2. In the **Navigation** pane, do one of the following:
   - To add a salesman code, right-click the **Salesman** folder and then click **New Salesman**. The **Salesman Properties** dialog box appears without any values.
   - To modify a salesman code, right-click the salesman code and then click **Properties**. The **Salesman Properties** dialog box appears with the current values.

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

**State Codes**

**State Codes**

Use the **Latitude Maintenance** window to search for or delete state codes. Use the **State Properties** dialog box to add or modify state codes. State codes control how to handle accounts within specific states. For example, letter restrictions, printed advisories, pop-up warnings for collectors, and surcharge permission. This information is also in Letter Console.

**To add or modify a state code**

1. In the **Main Menu** window, from the **Maintenance** menu, click **System Codes and Settings**. The **Latitude Maintenance** window appears.

2. In the **Navigation** pane, do one of the following:
   - To add a state code, double-click the **States** folder. The **State Properties** dialog box appears without any values.
   - To modify a state code, right-click the state code and then click **Properties**. The **State Properties** dialog box appears with the current values.
Abbreviation: State abbreviation.

Name: State name.

License Status: Optional place to store licensing information.

Restrict Letters: If selected, the system doesn't send letters to debtors who reside in the state.

Advisory: Advisory information to print on letters for debtors residing in the state. The system inserts this information in letters where you place the State_Legal_Advisory merge field in the letter body.

Warning: This information displays in the Warnings dialog box when the account first appears for debtors who reside in the state.

Permit Surcharge: If selected, the state allows collection of surcharges for debtors residing in the state. If cleared (to indicate that the state doesn't allow surcharges), the surcharge option does NOT appear on the Calculate Arrangements page in the Payment Arrangements Wizard.

3. Complete the information and then click OK.

Status Codes

Use the Latitude Maintenance window to search for or delete status codes. Use the Status Code Properties dialog box to add or modify status codes. Status codes are three-character codes used to indicate the state of an account and whether it is active or closed. You can change the status codes assigned to an account, based on your permissions. Latitude releases with several standard status codes. For more information, see Standard Status Codes.

Note: Certain Latitude system processes require specific status codes. See the standard status code list in the Work Form section for system-dependent codes.
To add or modify a status code

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.

2. In the Navigation pane, do one of the following:
   - To add a status code, right-click the Status Code folder and then click New Status Code. The Status Code Properties dialog box appears without any values.
   - To modify a status code, right-click the status code and then click Properties. The Status Code Properties dialog box appears with the current values.

   ![Status Code Properties](image)

   **Status Code**: Unique code that identifies the status.

   **Description**: Description of the status code.

   **Status Type**: The type of status. Valid values are:
   - **Active**: Latitude users can work accounts assigned an active status code. Text for accounts assigned an active status code appear in blue in the Work Form.
   - **Closed**: The system doesn’t schedule accounts assigned a closed status code into a collector’s work queue. Text for accounts assigned a closed status code appear in red in the Work Form.

   **Return Days**: Number of days to hold an account assigned to this status before returning the account to the customer.

   **This status code will reduce customer placement Statistics**: If selected, the system subtracts accounts assigned to this status code from customer account placements (in Statistics Console).

   **Include in case counts**: If selected, the Desk Mover tool counts accounts having this status against the Desk’s case limit. The system includes accounts with this status in the Case Counts report.

   **Note**: To configure credit bureau reporting options for a status code, use Credit Bureau Reporting Console. For more information, see the Credit Bureau Reporting Console documentation.

3. Complete the information and then click OK.

**Surcharge Type Codes**

**Surcharge Type Codes**

Use the Latitude Maintenance window to search for or delete surcharge type codes. Use the Surcharge Type Properties dialog box to add or modify surcharge type codes and their associated dollar or percent amounts.

To add or modify a surcharge type code

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.
2. In the Navigation pane, do one of the following:
   - To add a surcharge type code, right-click the Surcharge Type folder and then click New Surcharge Type. The Surcharge Type Properties dialog box appears without any values.
   - To modify a surcharge type code, right-click the surcharge type code and then click Properties. The Surcharge Type Properties dialog box appears with the current values.
3. Complete the information and then click OK.

Team Codes

Use the Latitude Maintenance window to search for or delete team codes. Use the Team Properties dialog box to add or modify team codes. You assign teams to a specific Department and use them for defining permissions and as a category within the Management Dashboard.

To add or modify a team code

1. In the Main Menu window, from the Maintenance menu, click System Codes and Settings. The Latitude Maintenance window appears.
2. In the Navigation pane, do one of the following:
   - To add a team code, right-click the Team folder and then click New Team. The Team Properties dialog box appears without any values.
   - To modify a team code, right-click the team code and then click Properties. The Team Properties dialog box appears with the current values.
3. Complete the information and then click OK.

**Custom Customer Groups**

**Custom Customer Groups**

Use the **Customer Groups** window to add and modify customer groups. Customer Groups represent general types of collection business given to your agency and allow you to categorize customers for invoicing and statistics. You can place individual customers into one or more groups (or none).

1. **Menu bar**: Displays submenus and commands for managing customer groups.

2. **Navigation pane**: Displays the customer groups and their associated customers. If you click a customer group in the Navigation pane, the customers assigned to that customer group appear in the Information pane. If you expand a customer group and double-click a customer in the Navigation pane, the customer record appears in the Information pane to allow you to modify the information.

3. **Information pane**: If you click a customer group in the Navigation pane, the customers assigned to that customer group appear in the Information pane. If you double-click a customer in the Navigation pane, the customer record appears in the Information pane to allow you to modify the information.

**Add a Customer Group**

Use the **New Custom Group** dialog box to add a customer group.

**To add a customer group**
1. In the **Main Menu** window, from the **Maintenance** menu, click **Custom Customer Groups**. The **Customer Groups** window appears.

2. From the menu bar, click **New Group**. The **New Custom Group** dialog box appears.

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

4. To assign a customer to the customer group, see [Add a Customer to a Customer Group](#).

### Modify a Customer Group

Use the **Edit Customer Group** dialog box to modify a customer group.

#### To modify a customer group

1. In the **Main Menu** window, from the **Maintenance** menu, click **Custom Customer Groups**. The **Customer Groups** window appears.

2. In the **Navigation** pane, right-click the customer group to modify and then click **Edit**. The **Edit Custom Group** dialog box appears.

### Custom Group's ID (30 Char):

Unique code that identifies the customer group. The ID can be up to 30 characters in length.

### Custom Group's Description (100 Char - Optional):

Description of the customer group. The description can be up to 100 characters in length and is optional.
3. Modify the information as necessary and then click **Save**.

**Delete a Customer Group**

Use the **Customer Groups** window to delete a customer group.

**To delete a customer group**

1. In the **Main Menu** window, from the **Maintenance** menu, click **Custom Customer Groups**. The **Customer Groups** window appears.
2. In the **Navigation** pane, right-click the customer group and then click **Delete Group**. The **Delete Custom Group** dialog box appears.
3. Click **Yes** and in the next dialog box, click **OK**. The system removes the customer group. Customers associated to the group remain in the system.

**Modify Customer Group Settings**

Use the **Customer Groups** window to modify customer group settings.

**To modify customer group settings**

1. In the **Main Menu** window, from the **Maintenance** menu, click **Custom Customer Groups**. The **Customer Groups** window appears.
2. In the **Navigation** pane, click a customer group. The customer group settings appear in the **Information** pane.

![Customer Groups Window]

**Display Group on Statistics Console**: If selected, the customer group is available for selection in Statistics Console.
Display Group in Invoice application: If selected, the customer group is available for selection in Latitude Invoices.

3. In the **Information** pane, complete the information. The system saves your changes automatically.

**Add a Customer to a Customer Group**

Use the **Customer Groups** window to add a customer to a customer group.

**To add a customer to a customer group**

1. In the **Main Menu** window, from the **Maintenance** menu, click **Custom Customer Groups**. The **Customer Groups** window appears.

2. In the **Navigation** pane, click **All Customers**. All customers in the system appear in the **Information** pane.

3. In the **Information** pane, click a customer, and then drag and drop it onto a customer group in the **Navigation** pane.

   **Tip**: You can select multiple customers to drag and drop onto a customer group.

   - To select contiguous customers, click the first customer to select, hold down the **Shift** key and click the last customer to select. Drag and drop the customers to the customer group.
   - To select non-contiguous customers, click the first customer to select, hold down the **Ctrl** key and click each additional customer to select. Drag and drop the customers to the customer group.

**Modify a Customer in a Customer Group**

Use the **Customer Groups** window to modify a customer.

**To modify a customer in a customer group**

1. In the **Main Menu** window, from the **Maintenance** menu, click **Custom Customer Groups**. The **Customer Groups** window appears.

2. In the **Navigation** pane, click a customer. The customer information appears in the **Information** pane.
3. Modify the information as necessary and then click **OK**.

   **Note:** You can also modify customer information in the **Latitude - Customer Properties** dialog box. For more information, see **Customer Codes**.

## Remove a Customer from a Customer Group

Use the **Customer Groups** window to remove a customer from a customer group.

**To remove a customer from a customer group**

1. In the **Main Menu** window, from the **Maintenance** menu, click **Custom Customer Groups**. The **Customer Groups** window appears.

2. In the **Navigation** pane, right-click the customer and then click **Remove Customer**. The system removes the customer from the customer group. The customer remains in the system.

## Manage Latitude

### New Business

Management functionality includes linking and unlinking debtor accounts, flagging invalid debtor account addresses, setting up new debtor accounts, and recording debtor payments.

Use the **New Business** window to add debtor accounts to a customer.
Specify Customer Options

Use the Options tab to select a customer and desk for the debtor account and specify options for the other tabs in the New Business window. Select a customer before you enter information on any of the other tabs. Assign a desk to receive new accounts before you save the information.

To specify customer options

1. In the Main Menu window, from the Data Entry menu, click New Business. The New Business window appears.
2. Click the Options tab.

3. To select a customer, do the following:
   a. Click the ellipsis (…) next to the Customer box. The Select Customer dialog box appears.
b. Click a folder to expand it, double-click the customer, or click the customer and then click **Select**. Latitude populates the **New Business** window with the selected customer's information and displays more information on the **Options** tab.
**Date Received:** Date your agency received the new business from the customer. The **Date Received** defaults to the current date.

**Initial Letter:** Initial letter to send to debtor accounts associated to the customer.

**Note:** The dunning-type letters available for the customer are based on how your agency defined the letters in Letter Console.

**Letter Series:** Series of letters to send to debtor accounts associated to the customer.

**Notes:**

- The letter series available for the customer are based on how your agency defined the letter series in Letter Console.
- Once you save the debtor account, the letter or letter series is available for printing from the **Account Letters** window in the **Work Form** or using Letter Console.

**Auto zipcode:** If selected, Latitude populates the **City** and **State** boxes when you specify a ZIP Code.

**Link on SSN:** If selected, Latitude asks if you want to link new debtor accounts to existing debtor accounts that have the same Social Security Number. If cleared, Latitude links the accounts without your approval.

**Allow dupe customer accounts:** If selected, you can add more than one debtor account for the same customer account number (specified on the **Debtor Information** tab). If cleared, you can only add one debtor account for a customer account number.
Skip dates tab: If selected, when you click Next (or press the Alt key plus the right arrow key), the system skips the Dates tab.

Skip extra data tab: If selected, when you click Next (or press the Alt key plus the right arrow key), the system skips the Extra Data tab.

Disable automatic collection fees: If selected, the system doesn't add collection fees set up for the customer (in the Customer Properties - Fees tab) to the account when entering balance information.

(Check all): Select to have Latitude select all check boxes in the Field Options section. Clear to have Latitude clear all check boxes in the Field Options section.

Work phone: If selected, allows you to specify a work phone number on the Debtor Information tab.

Fax: If selected, allows you to specify the debtor's fax number on the Debtor Information tab.

Email: If selected, allows you to specify the debtor's email address on the Debtor Information tab.

Pager: If selected, allows you to specify the debtor's pager number on the Debtor Information tab.

Driver license: If selected, allows you to specify the debtor's driver's license number on the Debtor Information tab.

SSN: If selected, allows you to specify the debtor's Social Security Number on the Debtor Information tab.

DOB: If selected, allows you to specify the debtor's date of birth on the Debtor Information tab.

Last three boxes in the first column: The labels for these check boxes are based on settings on the Account Titles tab of the Latitude - Control File Properties dialog box. If you set a value on the Account Titles tab, that value displays as a label on this tab. If you didn't set a value on the Account Titles tab, the label appears as either "User 1", "User 2", or "User 3." If any of these check boxes have a label other than "User 1", "User 2", or "User 3" and you select the check box, it allows you to specify a value on the Dates tab.

For example, "Date First Billed" displays instead of "User 1" if the User Date Title 1 box on the Account Titles tab of the Latitude - Control File Properties dialog box has a value of "Date First Billed." If you select the Date First Billed check box, you can specify the date that you first billed the account in the Date First Billed box on the Dates tab.

Delinquency date: If selected, allows you to specify the date you first noted the debtor account as delinquent (by the customer) on the Debtor Information tab.

Interest rate / date: If selected, allows you to specify your agency's interest rate and date of last interest on the Dates tab.

Interest: If selected, allows you to specify the interest amount for the debtor account.
Last seven boxes in the second column: The labels for these check boxes are based on settings on the Money Titles tab of the Latitude - Control File Properties dialog box. If you set a value on the Money Titles tab, that value displays as a label on this tab. If you didn't set a value on the Money Titles tab, the label appears as either "Bucket 3," "Bucket 4," "Bucket 5," "Bucket 6," "Bucket 7," "Bucket 8," or "Bucket 9." If any of these check boxes have a label other than "Bucket" plus a number and you select the check box, it allows you to specify a value on the Balance tab.

For example, "Collection Costs" displays instead of "Bucket 1" if the Money1 box on the Money Titles tab of the Latitude - Control File Properties dialog box has a value of "Collection Costs." If you select the Collection Costs check box, you can specify a collection cost amount in the Collection Costs box on the Balance tab.

4. To select a desk, do the following:

a. Click the ellipsis (…) next to the Desk box. The Select Desk dialog box appears.

b. Do one of the following:

- If your agency has multiple branches and you want to display desks associated to a branch, in the Branch list box, click the branch. The desks associated to the branch appear in the search results.
- To search for a desk by desk name, in the Find box, type at least one character and then click Find. Desks that match the search criteria appear in the search results.
c. Do one of the following:

- To sort the search results by desk name, click **Order by desk name**.
- To sort the results by desk code, click **Order by desk code**.
- In the search results, double-click the desk, or click the desk and then click **Select**. Latitude populates the **Desk** and **Branch** boxes in the **New Business** window.

**Note:** Many agencies assign new business to an inventory desk, then use the Account Mover tool to distribute accounts among collector desks after performing new business actions on the accounts. For example, after running credit reports.

5. When finished with this tab, do one of the following:

- To save the information and display the next tab, click **Next>>**.
- To save the information and close the **New Business** window, click **Accept**.

**Add Debtor Information**

Use the **Debtor Information** tab to specify debtor information.

**To add debtor information**

1. In the **Main Menu** window, from the **Data Entry** menu, click **New Business**. The **New Business** window appears.
2. Click the **Debtor Information** tab.
Account: Customer’s account (reference) number for the debtor account.

Delinq. date: Date you first noted the debtor account as delinquent (from customer).

Original Creditor: (optional) First customer for the account. This information displays at the top of the Work Form beneath the customer name.

Debtor 1 tab: This tab is for the primary debtor on the account. If you didn’t select an option on the Options tab, that option isn’t available on this tab.

Name: Debtor's name. For an individual, the debtor name format is last name, first name, and middle initial (for example, Doe, John J). For a business, use the standard format (for example, ABC Bicycles).

Other name: Any other name the debtor uses.

SSN: The debtor's nine-digit Social Security Number, formatted as 999999999.

DOB: The debtor’s date of birth, formatted as MM/DD/CCYY.

Address: The debtor’s house number and street. The second line is for information such as an apartment or P.O. box number.

City/State/Zip: The debtor’s city, state, and ZIP Code. If you selected Auto zipcode on the Options tab, the City and State boxes are unavailable. When you specify a ZIP Code, Latitude populates the City and State boxes for you.

Bad address: If selected, the debtor’s address is invalid.
Home phone: The debtor's home phone number.
Work: The debtor’s work phone number.
Fax: The debtor's fax number.
Email: The debtor's email address.
Pager: The debtor’s pager number.
DL #: The debtor's driver's license number.

3. Complete the information.

4. To add another debtor to the account, click Add Debtor. The Debtor2 tab appears. Complete the information as indicated for the Debtor 1 tab. Add more debtors as needed.

5. When finished with this tab, do one of the following:
   - To save the information and display the next tab, click Next>>.
   - To save the information and close the New Business window, click Accept.

Add Debtor Account Dates

Use the Dates tab to specify debtor account date information.

To add debtor account dates

1. In the Main Menu window, from the Data Entry menu, click New Business. The New Business window appears.
2. Click the Dates tab.
First three boxes: The labels for these boxes are based on settings on the Account Titles tab of the Latitude - Control File Properties dialog box. If you set a value on the Account Titles tab, that value displays as a label on this tab. If you didn't set a value on the Account Titles tab, the label appears as either "User1," "User2," or "User3."

For example, "Date First Billed" displays instead of "User1" if the User Date Title 1 box on the Account Titles tab of the Latitude - Control File Properties dialog box and has a value of "Date First Billed." In this example, specify the date you first billed the account in the Date First Billed box.

Customer date last changed: Last date the customer charged the debtor account.

Customer date last paid: Last date the customer indicated receipt of a payment on the debtor account.

Date of last interest: Date to begin calculating simple interest. Latitude Custodian uses this date to calculate initial simple interest to add to the account.

Rate: Rate used to calculate simple interest for the account. The system adds accumulated interest to the Interest bucket each time the End of Day program runs. The format is 00.00 (for example, type 15.5 in the box to indicate a 15.5% interest rate).

Note: You can view or modify the interest rate for the account by selecting Info – Debtor Misc Info in the Work Form.
3. Complete the information and then do one of the following:
   - To save the information and display the next tab, click Next>>.
   - To save the information and close the New Business window, click Accept.

Add Extra Data

Use the Extra data tab to specify information such as contact information for the debtor's landlord.

To add extra data

1. In the Main Menu window, from the Data Entry menu, click New Business. The New Business window appears.

2. Click the Extra Data tab.

3. To add information such as contact information for the debtor's landlord, do the following:
   a. Click in one of the Extra data boxes. The Extra Data dialog box appears.
   b. In the Code list box, click a code. Boxes for that code appear. For example, if you select "LL," boxes appear to allow you to specify contact information for the debtor's landlord.
c. Complete the information and then click OK. The selected code appears in the Extra Data box on the Extra Data tab. You can add information for up to five codes.

| Note: to modify a code, in the Extra Data box, click the code and follow the previous steps. |

4. To add information not available on any of the other tabs in the New Business window, do the following:

   a. In the Title box, type a title to represent the information (for example, Lease Agreement Number).
   b. In the Data box, type a value to associate to the title (for example, type the lease agreement number).
   c. Click Add Data. The title and data appear in the data grid. Add more titles and data as needed.

| Note: To remove an item from the data grid, double-click the item. |

5. When finished with this tab, do one of the following:

   a. Click Next>> to save the information and display the next tab.
   b. Click Accept to save the information and close the New Business window.

Copy a Debtor Account

Use the File menu to copy an account so you can add accounts quickly.

To copy a debtor account

1. In the Main Menu window, from the Data Entry menu, click New Business. The New Business window appears.
2. Click File in the menu bar and then click Create Duplicate Account from...
3. Click one of the following options:
**Number:** Copies the account that matches the Latitude account number associated to an account.

**Account:** Copies the account that matches the customer account number associated to an account.

**ID 1:** Copies the account that matches the ID for the primary debtor associated to an account.

**ID 2:** Copies the account that matches the ID for the secondary debtor associated to an account.

The Create Duplicate Account dialog box appears.

4. In the Number, Account, ID 1, or ID 2 box, type the corresponding number and then click **OK**. The system copies the account and displays the information in the New Business window.

5. Modify the information on the tabs in the New Business window as needed and then click **Accept**.

**Note:** Change the customer account number to a unique number or check Allow dupe customer accounts on the General tab before saving the new account information.

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**Add Balance Information for a Standard Structure Account**

Use the **Balance tab** to specify account balance information for a standard structure based on "money buckets." The information displayed on the **Balance** tab depends on the customer's account structure.

**To add balance information for a standard structures account**

1. In the **Main Menu** window, from the **Data Entry** menu, click **New Business**. The New Business window appears.

2. Click the **Balance** tab.
Principal: Amount the debtor owes. The system uses this amount to calculate simple interest and collection costs.

Interest: Interest amount for the debtor account. The system adds any simple interest calculated during end-of-day processing to this amount.

Next seven boxes: The labels for these boxes are based on settings on the Money Titles tab of the Latitude - Control File Properties dialog box. If you set a value on the Money Titles tab, that value displays as a label on this tab. If you didn't set a value on the Money Titles tab, the label appears as either "Bucket 3," "Bucket 4," "Bucket 5," "Bucket 6," "Bucket 7," "Bucket 8," or "Bucket 9." If any of these check boxes have a label other than "Bucket" plus a number and you select the check box, it allows you to specify a value on the Balance tab.

For example, "Collection Costs" displays instead of "Bucket 1" if the Money1 box on the Money Titles tab of the Latitude - Control File Properties dialog box with a value of "Collection Costs." If you select the Collection Costs check box, you can specify a collection cost amount in the Collection Costs box on the Balance tab.

Note: For more information about how your agency uses each money bucket, see your administrator.

Trans surcharges: Amount to add to the debtor account as a transaction fee.

Total balance placed: Sum of all amounts on this tab.
**Use customer default fee schedule:** If selected, the system uses the customer's default fee schedule. If cleared, select a fee schedule from the list box. The fee schedule remains selected until you close the New Business window.

3. Click **Accept**.

### Add Balance Information for a POD Structured Account

Use the **Balance tab** to specify account balance information for a Particulars of Debt (POD) account structure. The information displayed on the **Balance** tab depends on the customer’s account structure.

**To add balance information for a POD structured account**

1. In the **Main Menu** window, from the **Data Entry** menu, click **New Business**. The **New Business** window appears.
2. Click the **Balance** tab.

![New Business window with balance tab](image)

**Use customer default fee schedule:** If selected, the system uses the customer's default fee schedule. If cleared, select a fee schedule from the list box. The fee schedule remains selected until you close the New Business window.

**PODs total:** Sum of all invoices in the data grid.

3. To add an invoice, click **Add...** The **POD Editor** dialog box appears.
4. Complete the information and then click **OK**. Add invoices as needed.

5. To edit an invoice, on the **Balance** tab in the data grid, select the invoice and click **Edit...** The **POD Editor** dialog box appears. Modify the information and then click **OK**.

6. To remove an invoice, on the **Balance** tab in the data grid, select the invoice and click **Remove...**

7. Click **Accept**.

**Link or Unlink Accounts**

**Link or Unlink Accounts**

Use the **Link Maintenance** window to link and unlink debtor accounts. Linked accounts are separate debtor accounts for the same responsible party that your agency holds. Linked accounts can belong to the same customer or different customers. You can view combined balances for linked accounts in the **Work Form** by clicking the **Links** button.

**Note:** Latitude links accounts automatically for the same debtor, based on SSN or other criteria (depending on your agency's import, new business, and Latitude Custodian settings).

**Search for an Account to Link or Unlink**

Use the **Search / Add other Accounts** tab in the **Link Maintenance** window to search for an account to link or unlink.

**To search for an account to link or unlink**

1. In the **Main Menu** window, from the **Data Entry** menu, click **Link/Unlink**. The **Link Maintenance** window appears.

2. Click the **Search / Add other Accounts** tab.
3. Select an option to search by Latitude Account ID, (debtor) Name, Customer Account number, or SSN.

4. In the Search box, type your search criteria and then click Search. Debtor accounts that match the search criteria appear in the Search Results pane.
Create a Link Between Accounts

Use the **View / Create Links** tab in the **Link Maintenance** window to create a link between accounts.

**To create a link between accounts**

1. In the **Main Menu** window, from the **Data Entry** menu, click **Link/Unlink**. The **Link Maintenance** window appears.
2. Click the **View / Create Links** tab and then click **New Link**. Latitude populates the **Link Number** box with the next sequential unique link number.
3. Click the **Search / Add other Accounts** tab.
4. If you haven't already searched for accounts to link, perform the steps for **Search for an Account to Link or Unlink**.
5. In the **Search Results** pane, click the account to link and then click **Add to Link**. The link number appears in the **Link** column.
6. Continue linking accounts that are currently displayed in the **Search Results** pane, enter new search criteria to locate other accounts to link, or close the **Link Maintenance** window.
Add an Account to a Link

Use the View / Create Links tab in the Link Maintenance window to add an account to a link.

To add an account to a link

1. In the Main Menu window, from the Data Entry menu, click Link/Unlink. The Link Maintenance window appears.
2. Click the View / Create Links tab.
3. In the Link Number box, type the link number to add accounts to and then click Get Link. The accounts associated to the link appear in the Accounts in this Link pane.
4. Click the Search / Add other Accounts tab.
5. If you haven’t already searched for accounts to link, perform the steps for Search for an Account to Link or Unlink.
6. In the Search Results pane, click the account to link and then click Add to Link. The link number appears in the Link column.
7. Continue linking accounts that are currently displayed in the Search Results pane, enter new search criteria to locate other accounts to link, or close the Link Maintenance window.

Remove an account from a link

Use the View / Create Links tab in the Link Maintenance window to remove an account from a link.

To remove an account from a link

1. In the Main Menu window, from the Data Entry menu, click Link/Unlink. The Link Maintenance window appears.
2. Click the View / Create Links tab.
3. In the Link Number box, type the link number to remove accounts from and then click Get Link. The accounts associated to the link appear in the Accounts in this Link pane.
4. Click the account to remove and then click Remove from Link.

Note: If the account is part of an active payment arrangement, you cannot remove the account from the link.

Auto Mail Return

Auto Mail Return

Auto Return allows you to flag accounts as having a bad address when the post office returns mail as undeliverable. You use a pen scanner to read a barcode that identifies an account in Latitude. Once the system matches the barcode to an account, Latitude flags it as having a bad address.

Latitude supports a PC keyboard wedge and stainless steel wand scanner. For more information about the latest hardware requirements, see the Latitude Premises-based System Requirements Technical Reference at help.genesys.com/latitude/10/desktop/pdfs/latitudepremisesbasedsystemrequirementstr.pdf.
Insert a Barcode Into a Letter

Use Letter Console to create or edit a letter and insert a barcode. You can create a barcode using the Latitude account number or the Latitude debtor ID. If you use the Latitude account number, the system only flags the primary debtor’s address as bad when the post office returns the letter as undeliverable and you scan it. If you use the Latitude debtor ID, the system flags all debtor addresses associated to the account as bad when the post office returns the letter as undeliverable and you scan it.

Requirements

- We recommend that you use a barcode font size that is 10 points or higher. Some pen scanners cannot read smaller font sizes.
- Install the "3 Of 9" barcode font on the workstation that prints or generates letters. If you use a letter service, provide them with the font to install on their equipment.

To insert a barcode into a letter

1. In the Main Menu window, from the Apps menu, click Letter Console.

2. Click the Letter Pool tab.
3. In the **Letter Templates** pane, click the letter and then click **Edit Template**. The letter template opens in Microsoft Word. If you are modifying a new template, the document is blank.

   **Note:** These instructions are for Microsoft Word 2010. For instructions using your version of Word, see the Microsoft Word documentation.

4. Click in the document where you want to insert the merge field.

5. On the **Mailings** tab, click **Insert Merge Field**. The **Insert Merge Field** dialog box appears.
6. Do one of the following:
   - To insert the Latitude account number to update the primary debtor's account only, do the following:
     a. Click Number and then click Insert. The Latitude account number merge field appears in the document and in brackets as follows: <<Number>>.
     b. Type an asterisk before and after the Number merge field so that it looks like the following: *
        *<<Number>>*.
   - To insert the debtor ID to update multiple debtor addresses, do the following:
     a. Click DebtorID and then click Insert. The Latitude debtor ID merge field appears in the document in brackets as follows: <<DebtorID>>.
     b. Type a "D" before the Debtor ID merge field and an asterisk before and after the merge field so that it looks like the following: *D<<DebtorID>>*.

7. Use your mouse to select the account number or debtor ID merge field, including the asterisks, and apply the 3 of 9 barcode font. A barcode appears in place of the merge fields.

8. When finished modifying the letter, click Save. A confirmation dialog box appears.

9. Click Yes.

Scan Returned Mail

Use the AutoReturn window to scan the barcode on letters that the post office returned as undeliverable. The system matches the barcode to an account in Latitude and flags the account as having a bad address.

To scan returned mail

1. On a workstation with a pen scanner attached, in the Main Menu window, from the Apps menu, click Auto Mail Return. The AutoReturn window appears.
2. Pass the pen scanner over the barcode (in either direction). The associated debtor name and address in Latitude appear.

3. Do one of the following:
   - If the information matches the name and address on the returned envelope, scan the next returned letter. The system flags the account as having a bad address.
   - If the information doesn't match the name and address on the returned envelope, press Esc. The account is not flagged; scan the next returned letter.

4. When finished processing mail returns, click X to close the window.

Process Returned Mail

Use the Mail Returns window to process mail that the post office returned as undeliverable or update an address that changed when you receive documents that indicate such.

To process returned mail
1. In the **Main Menu** window, from the **Data Entry** menu, click **Mail Returns**. The **Mail Returns** window appears.

![Mail Returns window]

2. To display an account, do one of the following:
   - In the account number box, type the account number and then click **Get Account**.
   - If your agency uses a pen scanner, scan the barcode on the returned mail.
   - Perform a search by doing the following:
     a. Click **Search**. The **Latitude Search - Search for Account** window appears.
     b. Enter search criteria and click **Search**.
     c. On the **Search Results** tab, click the account and then click **Select**.

   The account information appears in the **Mail Returns** window.
3. Do one of the following:
   - To flag the address as bad, click Set Mail Return or Good Address.
   - To change the address, in the address boxes, type the new address.
   - To view the account in the Work Form, click Display in Work Form.

4. To process returned mail for other debtors associated to the account, click the Co-Debtor tab and perform the previous step.

Credit Reports with SmartALX™

Credit Reports with SmartALX™
Latitude interfaces with SmartALX™, a third-party software product used to pull credit reports from three major credit reporting companies. Collectors and skip tracers can request credit reports for a debtor account or groups of debtor accounts that meet specific criteria. Once you request the credit reports and retrieve them in SmartALX™, you can import the information. The system attaches credit reports to their corresponding debtor account automatically to allow easy access while collectors work the accounts.

Request a Credit Report for an Account
Collectors and skip tracers can request a credit report for a debtor account. Requests are queued and processed in batches.

To request a credit report for an account
1. Do one of the following:
   - In the Main Menu window, click Work.
• Press Alt + W.
  
The Work Form appears.

2. Display the account in the Work Form using search, account history, or a work queue.

3. From the Skip menu, click Request Credit Report, and then click the credit bureau. The [Credit Bureau Name] Credit Report dialog box appears. The following example is for the Equifax credit bureau.

![Equifax Credit Report](image)

4. Select the type of report to request. The available report types vary based on the specified credit bureau.

5. Correct the information as necessary, omitting spaces and dashes in the ZIP Code and SSN.

   **Note:** Your changes apply to the credit report request only and the system doesn't save them to the Work Form.

6. Click Accept. The system generates the report request and places it in a queue. SmartALX™ processes the queue when sending the next batch of requests to the specified credit bureau.

**Request a Batch of Credit Reports**

You can use Credit Report Requester to request credit bureau reports for accounts that meet specific criteria. For more information, see Request a Credit Report.

**Create a Credit Report Request Export File**

Once you've requested individual and groups of credit reports, you're ready to create the export file that SmartALX™ uses to process requests and retrieve credit reports.

**To create a credit report request export file**

1. In the Main Menu window, from the File menu, click Export, and then click SmartALX/Credit Bureau Requests. The Export CBR Requests dialog box appears.
2. Click **Begin Export**. The **Save CBR Requests** dialog box appears.

3. Specify a location and type a name for the export file, and then click **Save**. The system creates the export file and displays a confirmation dialog box.

4. Click **OK**. The system populates the **Total Selected** box in the **Export CBR Requests** dialog box with the total number of accounts in the export file.

5. Click **Exit**.

**Process Credit Bureau Report Requests Using SmartALX**

Once you’ve created the credit report export file, you’re ready to process and request credit bureau reports using SmartALX™. You install this program on a workstation set up to exchange files with credit bureaus. This workstation needs a working modem. Also, Latitude by Genesys Support or your internal IS department must configure the workstation for each credit bureau.

**To process credit bureau report requests using SmartALX**

1. Start SmartALX™ on the designated workstation.

2. Provide your password and then click **OK**.
3. Click the workstation to log on to and then click **OK**.

4. To delete old data residing in SmartALX™, do the following:
   
a. From the **Activities** menu, click **Enter Data**.
   
b. Click the data grid icon. A window appears, which displays the data that was request previously.
   
c. In the lower section of the window, click **All** and then click the trash can icon. The system deletes the selected files.
   
d. Close the window.
   
5. From the **Activities** menu, click **Import**. The **Import** dialog box appears.
6. In the **Control Record Name** list box, click the credit bureau to send the credit report request to.

7. In the **File Name** box, type the name of the credit bureau report file to import or click **Browse** to locate it.

   **Note:** This file is the exported credit report requests. For more information, see [Create a Credit Report Request Export File](#). If you...

8. Click **Start**. If you imported this file previously, a dialog box appears.

9. Do one of the following:
   - To replace the data in the existing file with the data in the new file, click **Overwrite**.
   - To add the data from the new file to the existing file, click **Append**.

   If you chose to continue with the import, at completion, a message appears in the lower section of the window that shows the number of records saved and rejected, and the number of errors. The errors are normal and indicate that account records have incorrect or missing data. For the reports with errors, collectors can request a report for each of the accounts and correct the missing credit report or erroneous data.

10. In the toolbar, click the telephone icon to begin requesting reports from the credit bureau. A confirmation dialog box appears.

11. Click **Yes**. When the system receives the reports, it displays a message dialog box indicating the number of reports received.

12. Click **OK**.

13. From the **Activities** menu, click **Reports**. The **Bureau Reports Received** pane appears. It lists all the credit reports pulled based on the credit report request file.
14. In the lower section of the window, in the Print to list box, click Disk File. This file is the one you use to import the information into Latitude.

15. In the toolbar, click the print icon. The Save Report to File dialog box appears.

16. In the File name box, type a name for the file and then click OK. The File Already Exists dialog box appears.

17. Click Overwrite. A confirmation dialog box appears.

18. Click OK.

**Import SmartALX Credit Reports**

Once you've processed the credit report requests and created the import file, you're ready to import the credit reports. Latitude attaches the credit reports to their corresponding debtor accounts so agents can view them when working accounts. For more information about creating the import file, see [Process Credit Bureau Report Requests Using SmartALX](#).

**To import SmartALX credit reports**

1. In the Main Menu window, from the File menu, click Import, and then click SmartALX/Credit Reports. The Import Credit Reports dialog box appears.
2. Click in the **Input File Name** box. The **Open** dialog box appears.

3. Click the file to import and then click **Open**. The system populates the **Input File Name** box with the path to the import file.

4. Click **Process**. After importing, a message dialog box appears that indicates the number of accounts updated (credit reports attached).

5. Click **OK**.

**Query Tools**

Latitude contains a set of powerful tools that allow managers or other senior collection personnel to perform advanced SQL tasks using a customizable user interface. These query tools include the following:

- **Account Analysis**: Retrieves accounts that meet specific criteria and then sorts, groups, or summarizes the information for review. Creates a queue for working account groups on the fly.
- **Condition Builder**: Modifies selection criteria that is available for use in query tools.
- **Credit Report Requester**: Requests credit bureau reports for multiple accounts, based on customized selection criteria.
- **Custom Queue Manager**: Creates custom queues using specified selection criteria.
- **Desk Mover**: Moves accounts to specific desks based on specified selection criteria.
- **Letter Requester**: Requests letters for multiple accounts based on specified selection criteria.
- **Pool Queue Manager**: Creates pools of work for collectors based on specified selection criteria.
- **SQL Author**: Creates and stores custom SQL statements for use in other query tools or programs.
- **Status Changer**: Changes the status for groups of accounts based on specified selection criteria.

**Queries**

Use a query tool to create and run queries so you can perform actions on multiple accounts at once, based on criteria you specify. For more information, see **Query Tools**.

**Create a Query**

Use the panes in a query tool window to create a query.

**To create a query**

1. Open a query tool window.

2. To exclude duplicate records from the query results, select **Exclude Duplicate Records**. For example, if you created a condition for SSN, the system only includes one account with that SSN in the results.
3. To limit the query results to a specific number of records, select **Maximum Records** and then, in the box, type the maximum number of records to include in the results.

4. If there is a **Select Columns** pane, do the following as necessary:
   - Add one or more columns to the query.
   - Delete one or more columns from the query.
   - Modify the order of the columns.
   - Rename any columns.

5. In the **Conditions** pane, do the following as necessary:
   - Create one or more conditions for the query.
   - Modify one or more conditions.
   - Modify the order of the conditions.
   - Group conditions for evaluation.

6. In the **Order** pane, do the steps to **Specify the Sort Order for Query Results**.

7. To count the number of records that match the selection criteria, in the toolbar, click **Count**. The results appear in the **Query Designer** dialog box. Click **OK**.

8. To run the query, in the toolbar, click **Run**. The results appear on the **Results** tab. For more information, see **Query Results**.

9. To save the query, do the following:

   a. In the toolbar, click **Save**. The **Save Query Dialog** box appears.

   b. In the **Query Name** box, type a name for the query and then click **Save**.

   **Tip:** To overwrite an existing query, in the **Name** column, click the query to overwrite and then click **Save**.
Open an Existing Query

Use a query tool window to open an existing query. You can modify the query and save it under the same query name, which overwrites existing query. You can also save the query under a new name, which creates a query and leaves the original query as it was.

To open an existing query

1. Open a query tool window.
2. In the toolbar, click Open. The Open Query Dialog box appears.
3. Click the query and then click Open. The query appears in the query tool window.
4. To modify the query, change the settings as necessary.
5. To count the number of records that match the selection criteria, in the toolbar, click Count. The results appear in the Query Designer dialog box. Click OK.
6. To run the query, in the toolbar, click Run. The results appear on the Results tab. For more information, see Query Results.
7. To save the query, do the following:
   a. In the toolbar, click Save. The Save Query Dialog box appears.
b. In the Name column, click the query name and then click **Save**.

**Tip:** To create a query from the existing query, in the Query Name box, type a name for the query and then click **Save**. The original query remains unchanged.

**Select Columns Pane**

**Select Columns Pane**

Use the **Select Columns** pane in a query tool window to specify the data columns to include in the query result. A default set of columns displays in the **Select Columns** pane when you first open a query tool window.

**Note:** Not all query tool windows have a **Select Columns** pane.

**Add a Query Column**

Use the **Select Columns** pane in a query tool window to specify the columns to include in the query results.

**Note:** Not all query tool windows have a **Select Columns** pane.

**To add a query column**

1. Create a Query or Open an Existing Query.
2. In the Data Selection pane, click the plus sign (+) next to a folder to expand it.
3. Click the data to include as a column in the query results and drag and drop it in the **Select Columns** pane.
4. Drag and drop more data as necessary.

**Modify the Order of a Query Column**

Use the **Select Columns** pane in a query tool window to change the order in which columns of data appear in the query results.
To modify the order of a query column

1. Create a Query or Open an Existing Query.
2. In the Select Columns pane, do the following:
   - To move up a column in the list, click the column and then click the up arrow.
   - To move down a column in the list, click the column and then click the down arrow.

Modify the Name of a Query Column

Use the Select Columns pane in a query tool window to modify the name of a column in the query results.

To modify the name of a query column

1. Create a Query or Open an Existing Query.
2. In the Select Columns pane, click the column and then click the Rename icon. The system clears the column name and displays it as a box to allow you to modify it.
3. In the box, type the new name for the column and then press Enter. The original column name appears with the new name appended. For example, if you changed the Customer column to Client, the column name changes to Customer as Client.

Delete a Query Column

Use the Select Columns pane in a query tool window to delete a column to exclude it from the query results.

To delete a query column

1. Create a Query or Open an Existing Query.
2. In the Select Columns pane, right-click the column and then click Delete. A confirmation dialog box appears.
3. Click Yes.

Assign an Aggregate Function to a Column

Use the Select Columns pane in Account Analysis or SQL Author window to assign an aggregate function to a column. When you run the query, the aggregated values display in the column instead of the actual value. Non-aggregated columns create the groups that the aggregate data represents.

To assign an aggregate function to a column

1. Do one of the following:
   - Create an Account Analysis Query or Modify an Account Analysis Query.
   - Create a SQL Statement or Modify a SQL Statement.
2. In the **Select Columns** pane, click the column and then, in the toolbar, click the Aggregate icon.

3. Click a function. The original column name appears with the aggregate function name appended. For example, if you selected the “average” function for the **Current Balance** column, the **Current Balance** column name changes to **Average of Current Balance**.

4. To delete an aggregated function, click the column name and then click the Aggregate icon.

### Aggregate Functions

The following table describes the functions that are available when aggregating data. The functions available for an item are based on the item's data type.

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Count</td>
<td>Counts the number of records for the grouping.</td>
</tr>
<tr>
<td>Sum</td>
<td>Totals the values within the grouping.</td>
</tr>
<tr>
<td>Average</td>
<td>Averages the values within the grouping.</td>
</tr>
<tr>
<td>Maximum</td>
<td>Calculates the highest value within the grouping.</td>
</tr>
<tr>
<td>Minimum</td>
<td>Calculates the lowest value within the grouping.</td>
</tr>
<tr>
<td>Standard Deviation</td>
<td>Averages the difference from the mean value of the entire set of accounts included.</td>
</tr>
</tbody>
</table>
### Population Standard Deviation
Averages the difference from the mean value within the grouping.

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Variance</td>
<td>Squares the standard deviation.</td>
</tr>
<tr>
<td>Population Variance</td>
<td>Squares the standard deviation within the grouping.</td>
</tr>
<tr>
<td>Eliminate Duplicates</td>
<td>Changes the equation to add the &quot;distinct&quot; clause. You can use this function with any aggregate after the initial selection.</td>
</tr>
<tr>
<td>Remove Aggregate</td>
<td>Deletes the aggregate function and returns the column to its literal value.</td>
</tr>
</tbody>
</table>

#### Conditions Pane

#### Conditions Pane
Use the **Conditions** pane in query tool windows to specify the criteria for data to include in the result set.

#### Create a Query Condition

Use the **Conditions** pane in a query tool window to specify the criteria for which data to include in the query results.

#### To create a query condition

1.  Create a Query or Open an Existing Query.
2.  In the **Data Selection** pane, click the plus sign (+) next to a folder to expand it.
3.  Drag and drop a data item into the **Conditions** pane. A dialog box appears, which allows you to specify the criteria. The title of the dialog box and the information displayed depend on the condition selected.

    The following example shows the **Desk** dialog box that appears when you drag and drop the **Desk** data item into the **Conditions** pane.
4. In the dialog box, specify the criteria and then click **Okay**. The condition appears in the **Conditions** pane. In the following example, the condition indicates that you want to include in the query results accounts assigned to the "Collector 1 Desk."

5. Drag and drop more data items as necessary.

6. To modify the order of the conditions, do the steps to **Modify the Order of Query Conditions**.

7. To group conditions for evaluation, do the steps to **Group Conditions for Evaluation**.

8. To specify if a condition is optional or required, do the steps to **Set a Query Condition to Optional or Required**.

**Modify a Query Condition**

Use the **Conditions** pane in a query tool window to modify a query condition.

**To modify a query condition**

1. **Create a Query** or **Open an Existing Query**.

2. In the **Conditions** pane, do one of the following:
• Double-click a condition.
• Right-click a condition and then click Edit.

A dialog box appears, which allows you to modify the criteria. The title of the dialog box and the information displayed depends on the condition selected.

3. In the dialog box, modify the criteria and then click Okay. The system updates the condition in the Conditions pane.

Copy a Query Condition

Use the Conditions pane in a query tool window to copy a query condition.

To copy a query condition

1. Create a Query or Open an Existing Query.
2. In the Conditions pane, right-click a condition and then click Copy. The system copies the condition to the Clipboard.
3. In the Conditions pane, right-click where you want to copy the condition and then click Paste. The system pastes the condition in the specified location.

Group Query Conditions for Evaluation

Use the Conditions pane in a query tool window to separate conditions into groups when you require complex data mining.

To group query conditions for evaluation

1. Create a Query or Open an Existing Query.
2. In the Conditions pane, select the conditions to group.

   Tip: To select multiple sequential conditions, press and hold the Shift key and click the first and last sequential condition. To select multiple non-sequential conditions, press and hold the Ctrl key and click each individual condition. To select all conditions, right-click and then click Select All.

3. Right-click and then click Group. The system groups the selected conditions and flags the beginning and ending of the group.

4. Continue grouping conditions as necessary. The following example shows a complex grouping of conditions.
Modify the Order of Query Conditions

Use the **Conditions** pane in a query tool window to modify the order in which the system evaluates conditions.

**To modify the order of query conditions**

1. Create a Query or Open an Existing Query.
2. In the **Conditions** pane, do one of the following:
   - To move up a condition in the list, click the condition and then click the up arrow.
   - To move down a condition in the list, click the condition and then click the down arrow.

Set a Query Condition to Optional or Required

Use the **Conditions** pane in a query tool window to use Boolean operators (OR, AND) to set a query condition to optional or required. The system sets conditions "required" by default. If a query has a single condition, the system requires that condition and you cannot set it to optional. If the query has more than one condition, you can set each condition that follows the first condition in the list to required or optional. For more information about Boolean operators, see [Boolean Operators](#).

**To set a query condition to optional or required**

1. Create a Query or Open an Existing Query.
2. Do one of the following:
   - To change the query so that only one condition has to be true for an account to appear in the query results, click the second condition and then, in the toolbar, click the OR icon. The condition changes from "and" to "or."
   - To change the query to require both conditions for an account to appear in the query results, click the second condition and then, in the toolbar, click the AND icon. The condition changes from "or" to "and."

Delete a Query Condition

Use the **Conditions** pane in a query tool window to delete a condition from a query.

**To delete a query condition**
1. **Create a Query** or **Open an Existing Query**.

2. In the **conditions** pane, right-click the condition and then click **Delete**. A confirmation dialog box appears.

3. Click **Yes**.

**Boolean Operators**

Boolean operators allow you to set a query condition to optional or required.

**AND condition**

In the following example, both conditions must be true for an account to appear in the query results. So, if an account contract date is "February 7, 2013" and the Desk is "Collect 1 Desk," the system includes the account in the query results. If an account contract date is "February 7, 2013" but the Desk is not "Collect 1 Desk," the system excludes the account from the query results. If an account contract date is not "February 7, 2013" but the Desk is "Collect 1 Desk," the system excludes the account from the query results.

**OR condition**

In the following example, if an account contract date is "February 7, 2013" but the Desk is not "Collect 1 Desk," the system includes account in the query results. If an account contract date is not "February 7, 2013" but the Desk is "Collect 1 Desk," the system includes the account in the query results. If an account contract date is "February 7, 2013" and the Desk is "Collect 1 Desk," the system includes the account in the query results. If an account contract date is not "February 7, 2013" or the Desk is not "Collect 1 Desk," the system excludes the account from the query results.

**Query Condition Types**

You use query conditions when creating and running queries. For each condition 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:

- **Dates**
- **Single option**
- **Multiple option**

**Dates**
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 is list box, and whether you select the Relative check box.

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

<table>
<thead>
<tr>
<th>Value is</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equal To</td>
<td>Retrieves accounts where the date matches a specific date.</td>
</tr>
<tr>
<td>Not Equal To</td>
<td>Retrieves accounts where the date does not match a specific date.</td>
</tr>
<tr>
<td>Later Than or Equal To</td>
<td>Retrieves accounts where the date matches or comes after a specific date.</td>
</tr>
<tr>
<td>Earlier Than or Equal To</td>
<td>Retrieves accounts where the date matches or comes before a specific date.</td>
</tr>
<tr>
<td>Later Than</td>
<td>Retrieves accounts where the date comes after a specific date.</td>
</tr>
<tr>
<td>Earlier Than</td>
<td>Retrieves accounts where the date comes before a specific date.</td>
</tr>
</tbody>
</table>

In the following example, the system retrieves accounts where the Closed Date is 01/01/2012.

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

<table>
<thead>
<tr>
<th>Value is</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Between</td>
<td>Retrieves accounts where the date falls between two specific dates.</td>
</tr>
<tr>
<td>Not Between</td>
<td>Retrieves accounts where the date comes before a specific start date or after a specific end date, but not between the two dates.</td>
</tr>
</tbody>
</table>

In the following example, the system retrieves accounts where the Closed Date falls on or between 01/01/2012 and 02/01/2012.

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

<table>
<thead>
<tr>
<th>Value is</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Value</td>
<td>Retrieves accounts where the date is blank.</td>
</tr>
<tr>
<td>Any Value</td>
<td>Retrieves accounts where the date is any date or blank.</td>
</tr>
</tbody>
</table>

In the following example, the system retrieves accounts where the **Closed Date** is blank (doesn't contain a value).

![Closed Date](image)

**Relative date**

Use the relative date option to evaluate 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 evaluate accounts based on the calculated relative date:

<table>
<thead>
<tr>
<th>Value is</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equal To</td>
<td>Retrieves accounts where the date matches the relative date.</td>
</tr>
<tr>
<td>Not Equal To</td>
<td>Retrieves accounts where the date does not match the relative date.</td>
</tr>
<tr>
<td>Later Than or Equal To</td>
<td>Retrieves accounts where the date matches or comes after the relative date.</td>
</tr>
<tr>
<td>Earlier Than or Equal To</td>
<td>Retrieves accounts where the date matches or comes before the relative date.</td>
</tr>
<tr>
<td>Later Than</td>
<td>Retrieves accounts where the date comes after the relative date.</td>
</tr>
<tr>
<td>Earlier Than</td>
<td>Retrieves accounts where the date comes before the relative date.</td>
</tr>
</tbody>
</table>

In the following example, the system retrieves accounts where the **Closed Date** is two days before the current date.

![Closed Date](image)

**Single option**

Single option conditions allow you to retrieve accounts that match a single option in a group of options. In the following example, the system retrieves accounts that are the parent link to other accounts.
Multiple option

Multiple option conditions allow you to retrieve accounts that match one or more options in a group of options. In the following example, the system retrieves accounts assigned to the POD desk and accounts assigned to the POOL desk.

Query Results

Query Results

Use the Results tab in a query tool window to view the results of a query, and change the view.

Run a Query

Use a query tool window to run a query.

To run a query

1. Create a Query or Open an Existing Query.
2. To see how many records the query returns before running the query, do the following:
   a. In the toolbar, click Count. The Query Designer dialog box appears.
b. Click OK.

3. In the toolbar, click Run. The results appear on the Results tab. For more information, see Query Results. The following example shows the Results tab in the Account Analysis window.

Specify the Sort Order for Query Results

Use the Order pane in a query tool window to specify the sort order for the data returned in the query results. For example, if desk and customer display in the Order pane, the system sorts the query results by desk and then by customer within the desk.

To specify the sort order for query results

1. Create a Query or Open an Existing Query.
2. In the Data Selection pane, click the plus sign (+) next to a folder to expand it.
3. Drag and drop a data item to use to sort the query results into the Order pane.
4. Drag and drop more data as necessary.
Note: If the query tool window has a Select Columns pane, you can sort by aggregate data by dragging the aggregated column from the Select Columns pane and dropping it into the Order pane. For more information about aggregating data, see Assign an Aggregate Function to a Column.

5. To delete a data item from the sort, in the Order pane, click the data item and then click the Delete icon. A confirmation dialog box appears. Click Yes.

6. To change the sort order for data items, in the Order pane, click the data item and then click the up or down arrows to move the item in the list.

7. To set the data item to sort in ascending order, in the Order pane, click the data item and then click the Ascending icon.

8. To set the data item to sort in descending order, in the Order pane, click the data item and then click the Descending icon.

Arrange Query Column Headings

Use the Results tab in a query tool window to change the order in which columns appear in the query results.

To arrange query column headings

1. Create a Query or Open an Existing Query.

2. In the toolbar, click Run. The results appear on the Results tab. The following example shows the Results tab in the Account Analysis window.

3. Click a column heading and drag it to the new location.
4. When two red arrows appear in the location where you want to place the column, release your mouse.

Pin a Query Column

Use the Results tab in a query tool window to pin a column in the query results so that it remains stationary when you scroll horizontally.

To pin a query column

1. Create a Query or Open an Existing Query.
2. In the toolbar, click Run. The results appear on the Results tab. The following example shows the Results tab in the Account Analysis window.

3. In the column heading, click the pushpin . The pushpin points down to indicate a pinned column.
4. Scroll horizontally in either direction and the pinned column remains stationary.

Sort Query Results

Use the Results tab in a query tool window to sort the query results.

To sort query results
Latitude Printable Help for Administrators

1. Create a Query or Open an Existing Query.
2. In the toolbar, click Run. The results appear on the Results tab. The following example shows the Results tab in the Account Analysis window.

![Account Analysis window with query results](image)

3. Click a column heading. An arrow appears and points up to indicate that the column is in ascending order.

   ![File Number column](image)

4. To sort the column in descending order, click the column heading again. The arrow points down to indicate that the column is in descending order.

**Group Accounts in the Query Results**

Use the Results tab in a query tool window to group accounts in the query results.

**To group accounts in the query results**

1. Create a Query or Open an Existing Query.
2. In the toolbar, click Run. The results appear on the Results tab. The following example shows the Results tab in the Account Analysis window.
3. Click a column heading, drag it into the space above the column headings, and drop it. The system groups the accounts on the specified column. The following example shows accounts grouped by customer.
4. To view the accounts in a group, click the plus sign (+) next to the group to expand it.

5. To add a group within a group, do the following:
   a. Click the plus sign (+) next to the group to expand it.
   b. Click a column heading, drag it into the space above the column headings, and drop it.

6. To change the sort for a group, click the group heading. The system sorts the groups in ascending order by default.

7. To remove a group, click the group heading and drag and drop it back into the query results space.

Summarize Query Data

Use the Results tab in a query tool window to summarize query results.

To summarize query results

1. Create a Query or Open an Existing Query.

2. In the toolbar, click Run. The results appear on the Results tab. The following example shows the Results tab in the Account Analysis window.
Latitude Printable Help for Administrators

3. In the column heading, click the Sigma icon 🖼️. The **Select Summaries** dialog box appears. The options available depend on the item's data type.

4. Select the calculations to perform on the data and then click **OK**. The result appears in the last row of the data grid. If you grouped data, the system calculates the data for each group and displays the results in the last row for each group.

### Export Query Results

Use the **Results** tab in a query tool window to export the results of a query.
To export query results

1. Create a Query or Open an Existing Query.
2. In the toolbar, click Run. The results appear on the Results tab. The following example shows the Results tab in the Account Analysis window.

3. To export the results, do one of the following:
   - To export the query results to an Excel file, in the toolbar, click Export to Excel.
   - To export the query results to a comma-separated value (CSV) file, in the toolbar, click Export to Comma Separated File. The file includes a heading row, with values contained in quotes and separated by commas.
   - To export the query results to an XML file, in the toolbar, click Export to XML. In the file, the column names display as the element tags.

   The corresponding Export Results to dialog box appears.

4. In the File name box, type a name for the file and then click Save.

Filter Query Results

Use the Results tab in a query tool window to filter query results.

To filter query results

1. Create a Query or Open an Existing Query.
2. In the toolbar, click Run. The results appear on the Results tab. The following example shows the Results tab in the Account Analysis window.
3. In the column heading of the column to filter, click the Funnel icon 📊. A list of options for the specified column appears.

(All): If selected, the system doesn't filter the results.
(Custom): If selected, allows you to set custom filtering conditions.
(Blanks): If selected, the system limits the results to accounts with a blank or null value in the specified column.
(NonBlanks): If selected, the system limits the results to accounts that don't have a blank or null value in the specified column.

4. Click any value other than (Custom). The system closes the list and limits the query results to the records that match the specified filter.

5. To set custom filter criteria, do the steps to Set Custom Filter Criteria.

Set Custom Filter Criteria
Use the **Enter Filter Criteria for...** dialog box to customize selection criteria for any column in the query results. You can combine selection criteria (or conditions) to create more complex filters.

**To set custom filter criteria**

1. [Create a Query](#) or [Open an Existing Query](#).
2. In the toolbar, click **Run**. The results appear on the **Results** tab. The following example shows the **Results** tab in the **Account Analysis** window.

3. In the column heading of the column to filter, click the Funnel icon \(\text{\textbullet}\). A list of options for the specified column appears.

4. Click **(Custom)**. The **Enter Filter Criteria for...** dialog box appears. The following example shows the dialog box for the **Customer** column.
5. In the **Operand** list box, click an operator. For more information, see Custom Filter Operators.

6. In the **Operand** list box, click or type an operand. In the previous example, the operator is "= Equals" and the operand is "0000001 - CUSTOMER ONE." The condition appears in the lower portion of the dialog box.

7. To add conditions, click **Add a condition**. The system adds a blank row.

8. To delete a condition, click the condition and then click **Delete Condition**.

9. If you set multiple conditions, do one of the following:
   - To set the filter so that all the conditions have to be true for an account to appear in the query results, click **And conditions**. For example, customer doesn't equal "0000001 - CUSTOMER ONE" and customer does not equal "0000002 - CUSTOMER TWO" means to select accounts for all customers except Customer One and Customer Two.
   - To set the filter so that only one condition has to be true for an account to appear in the query results, click **Or conditions**. For example, customer equals "0000001 - CUSTOMER ONE" or customer equals "0000002 - CUSTOMER TWO" means to select accounts for Customer One or Customer Two.

10. When finished creating the custom filter, click **OK**.

**Custom Filter Operators**

The following table describes the operators that are available when setting custom filter criteria for query results. The operators available for a data item are based on the item's data type.

<table>
<thead>
<tr>
<th>Operator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equals</td>
<td>Include accounts in the query results where the data matches the specified value.</td>
</tr>
<tr>
<td>Does not equal</td>
<td>Include accounts in the query results where the data does not match the specified value.</td>
</tr>
<tr>
<td>Operator</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------</td>
<td>--------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Less than</td>
<td>Include accounts in the query results where the data is less than the specified value.</td>
</tr>
<tr>
<td>Less than or equal To</td>
<td>Include accounts in the query results where the data is less than or equal to the specified value.</td>
</tr>
<tr>
<td>Greater than</td>
<td>Include accounts in the query results where the data is greater than the specified value.</td>
</tr>
<tr>
<td>Greater than or equal To</td>
<td>Include accounts in the query results where the data is greater than the specified value.</td>
</tr>
<tr>
<td>Like</td>
<td>Includes accounts in the query results where data matches the specified pattern.</td>
</tr>
<tr>
<td>Matches Regular Expression</td>
<td>Includes accounts in the query results where data is in the specified format.</td>
</tr>
<tr>
<td></td>
<td>^[A-Z] finds all values in uppercase character format only.</td>
</tr>
<tr>
<td></td>
<td>^[a-z] finds all values in lowercase character format only.</td>
</tr>
<tr>
<td></td>
<td>^[0-9] finds all values in numeric format only.</td>
</tr>
<tr>
<td></td>
<td>^[A-Za-z] finds all values in mixed case character format.</td>
</tr>
<tr>
<td></td>
<td>^[A-Za-z] finds all values in mixed case character format.</td>
</tr>
<tr>
<td></td>
<td>^[^0-9]+$ finds all values with a numeric format and dollar sign.</td>
</tr>
<tr>
<td></td>
<td>^[A-Za-z0-9] [A-Za-z0-9_]*$ finds all values of mixed case and currency.</td>
</tr>
<tr>
<td>Starts with</td>
<td>Includes accounts in the query results where data starts with the specified character or characters.</td>
</tr>
<tr>
<td>Contains</td>
<td>Includes accounts in the query results where data contains the specified character or characters.</td>
</tr>
<tr>
<td>Ends with</td>
<td>Includes accounts in the query results where data ends with the specified character or characters.</td>
</tr>
<tr>
<td>Does not start with</td>
<td>Includes accounts in the query results where data does not start with the specified character or characters.</td>
</tr>
<tr>
<td>Does not contain</td>
<td>Includes accounts in the query results where data does not contain the specified character or characters.</td>
</tr>
</tbody>
</table>
Does not end with
Includes accounts in the query results where data does not end with the specified character or characters.
This operator is for alphanumeric data types only.

Does not match
Includes accounts in the query results where data does not match the specified character or characters.
This operator is for alphanumeric data types only.

Not like
Includes accounts in the query results where data is not like the specified pattern.
This operator is for alphanumeric data types only.

Account Analysis

Account Analysis

Use Account Analysis to create queries to retrieve accounts that meet specific criteria. You can sort, group, and summarize the information for review. You can also use this window to create a queue so users can view or work accounts that meet specific criteria.

**Note:** You cannot use portfolio conditions to query accounts in Latitude as portfolios and groups related to portfolios (for example, buyers, sellers, and investors) aren't at the account level. You can only use portfolio conditions to search for portfolios and groups in Portfolio Manager.
1. **Toolbar:** Provides options for clearing, opening, saving, and running selection criteria, and counting the query results.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Clear" /></td>
<td>Clears all query settings currently displayed in the window.</td>
</tr>
<tr>
<td><img src="image" alt="Open" /></td>
<td>Clears the query settings currently displayed in the window and opens a saved query.</td>
</tr>
<tr>
<td><img src="image" alt="Save" /></td>
<td>Saves the query settings currently displayed in the window.</td>
</tr>
<tr>
<td><img src="image" alt="Count" /></td>
<td>Sums the number of records that match the selection criteria.</td>
</tr>
<tr>
<td><img src="image" alt="Run" /></td>
<td>Runs the query and displays the results on the Results tab.</td>
</tr>
</tbody>
</table>

2. **Data Selection pane:** Provides a list of data you can select to create a query.

3. **Select Columns pane:** Allows you to select and arrange the columns of data to display in the query results.

4. **Conditions pane:** Allows you to set the conditions for retrieving data.

5. **Order pane:** Allows you to set the order for displaying or running data.

**Create an Account Analysis Query**

Use the Account Analysis window to query accounts based on specific criteria and analyze the results. You can also use this window to create a queue for viewing and working specific accounts. For more information, see View or Work Accounts in a Virtual Queue.

**To create an account analysis query**

1. In the Main Menu window, from the Tools menu, click Account Analysis. The Account Analysis window appears.
2. To exclude duplicate records from the query results, select **Exclude Duplicate Records**.

3. To limit the query results to a specific number of records, select **Maximum Records** and then, in the box, type the maximum number of records to include in the results.

4. In the **Select Columns** pane, do the following as necessary:
   - **Add one or more columns to the query**.
   - **Delete one or more columns from the query**.
   - **Modify the order of the columns**.
   - **Rename any columns**.
5. In the **Conditions** pane, do the following as necessary:
   - Create one or more conditions for the query.
   - Modify one or more conditions.
   - Modify the order of the conditions.
   - Group conditions for evaluation.

6. In the **Order** pane, do the steps to **Specify the Sort Order for Query Results**.

7. To count the number of records that match the selection criteria, in the toolbar, click **Count**. The results appear in the **Query Designer** dialog box. Click **OK**.

8. To save the query, do the following:
   a. In the toolbar, click **Save**. The **Save Query Dialog** box appears.
   
      ![Save Query Dialog]

      b. In the **Query Name** box, type a name for the query and then click **Save**.

      **Tip**: To overwrite an existing query, in the **Name** column, click the query to overwrite and then click **Save**.

9. To run the query, do the steps to **Run an Account Analysis Query**.

**Modify an Account Analysis Query**

Use the **Account Analysis** window to modify a query for analyzing accounts.

**To modify an account analysis query**

1. In the **Main Menu** window, from the **Tools** menu, click **Account Analysis**. The **Account Analysis** window appears.
2. In the toolbar, click **Open**. The **Open Query Dialog** box appears.
3. In the **Name** column, click the query and then click **Open**. The query appears in the **Account Analysis** window.

4. Modify the query as necessary.

5. To save the query, do the following:
   a. In the toolbar, click **Save**. The **Save Query Dialog** box appears.

   b. In the **Name** column, click the query name and then click **Save**.

   **Tip:** To create a query from the existing query, in the **Query Name** box, type a name for the query and then click **Save**. The original query remains unchanged and the system creates a new query.

6. To run the query, do the steps to **Run an Account Analysis Query**.
**Run an Account Analysis Query**

Use the **Account Analysis** window to run an account analysis query.

**To run an account analysis query**

1. [Create an Account Analysis Query](#) or [Modify an Account Analysis Query](#).

2. In the toolbar, click **Run**. The results appear on the **Results** tab. For more information, see **Query Results**.
View or Work Accounts in a Virtual Queue

Use the Account Analysis window to specify the accounts to display in a virtual queue in the Work Form. You can view and work these accounts just as you would for any other queue. However, the system doesn't change the queue levels or display the Account Follow-up dialog box automatically.

To view or work accounts in a virtual queue

1. In the Main Menu window, click Work or press Alt + W. The Work Form appears. The Work Form appears.
2. In the Main Menu window, from the Tools menu, click Account Analysis. The Account Analysis window appears.
3. Do the steps to Run a Query. The results appear on the Results tab.
4. Leave the Account Analysis window open and click the open Work Form. The Work Form appears.
   Tip: The Work Form is either behind other windows or it's minimized in your taskbar.
5. Click Next Queue. The first account on the Results tab in the Account Analysis window appears in the Work Form. The system removes the account from the Results tab.
6. View or work the account as necessary and then click **Next Queue**. The next account on the **Results** tab in the **Account Analysis** window appears in the **Work Form**. The system removes the account from the **Results** tab.

7. You can continue working the queue as long as the **Account Analysis** window is open. After working the queue, close the **Account Analysis** window.

**Assign an Aggregate Function to a Column**

Use the **Select Columns** pane in **Account Analysis** or **SQL Author** window to assign an aggregate function to a column. When you run the query, the aggregated values display in the column instead of the actual value. Non-aggregated columns create the groups that the aggregate data represents.

**To assign an aggregate function to a column**

1. Do one of the following:
   - **Create an Account Analysis Query** or **Modify an Account Analysis Query**.
   - **Create a SQL Statement** or **Modify a SQL Statement**.

2. In the **Select Columns** pane, click the column and then, in the toolbar, click the Aggregate icon.
3. Click a function. The original column name appears with the aggregate function name appended. For example, if you selected the “average” function for the Current Balance column, the Current Balance column name changes to **Average of Current Balance**.

4. To delete an aggregated function, click the column name and then click the Aggregate icon.

### Aggregate Functions

The following table describes the functions that are available when aggregating data. The functions available for an item are based on the item’s data type.

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Count</td>
<td>Counts the number of records for the grouping.</td>
</tr>
<tr>
<td>Sum</td>
<td>Totals the values within the grouping.</td>
</tr>
<tr>
<td>Average</td>
<td>Averages the values within the grouping.</td>
</tr>
<tr>
<td>Maximum</td>
<td>Calculates the highest value within the grouping.</td>
</tr>
<tr>
<td>Minimum</td>
<td>Calculates the lowest value within the grouping.</td>
</tr>
<tr>
<td>Standard Deviation</td>
<td>Averages the difference from the mean value of the entire set of accounts included.</td>
</tr>
<tr>
<td>Population Standard Deviation</td>
<td>Averages the difference from the mean value within the grouping.</td>
</tr>
</tbody>
</table>
### Variance
Squares the standard deviation.

### Population Variance
Squares the standard deviation within the grouping.

### Eliminate Duplicates
Changes the equation to add the "distinct" clause. You can use this function with any aggregate after the initial selection.

### Remove Aggregate
Deletes the aggregate function and returns the column to its literal value.

---

**Condition Builder**

**Condition Builder**

Use Condition Builder to maintain the list of conditions users can select when creating queries using a query tool. You must have the Configure Query Designer Conditions permission.

![Condition Builder](image)

1. **Toolbar:** Provides options for configuring conditions.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Add Table" /></td>
<td>Opens the Add Table Wizard to allow you to map a Latitude database table or view to conditions.</td>
</tr>
<tr>
<td><img src="image" alt="Load Assembly" /></td>
<td>Adds a .dll assembly file containing conditions that Latitude by Genesys created for your organization.</td>
</tr>
<tr>
<td><img src="image" alt="Save" /></td>
<td>Saves the condition configuration.</td>
</tr>
<tr>
<td><img src="image" alt="Script" /></td>
<td>Allows you to create a SQL file that contains the specified conditions.</td>
</tr>
</tbody>
</table>
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| ![Create Folder] | Allows you to create a folder in the **Condition Selection** pane. |
| ![Move To Top] | Allows you to move a folder or condition. |
| ![Delete] | Allows you to delete a folder or condition. |
| ![Test] | Allows you to test a condition to ensure it's configured properly. |

2. **Condition Selection pane**: Provides a list of conditions that are available to users when they create queries. You can add, modify, and configure the conditions.

3. **Condition Types pane**: Allows you to add a condition type to the **Data Selection** pane.

4. **Properties pane**: Allows you to view and modify the configuration settings for the condition selected in the **Data Selection** pane.

### Add a Database Table

Use the **Add Table Wizard** to add columns from a Latitude database table or view to the **Condition Selection** pane in the **Configure Conditions** window.

**To add a database table**

1. In the **Main Menu** window, from the **Tools** menu, click **Condition Builder**. The **Configure Conditions** window appears.

2. In the toolbar, click **Add Table**. The **Add Table Wizard** appears.
3. Click **Next**. The **Select Table or View** page appears, which lists the Latitude database tables and views.

4. Click the table or view and then click **Next**. The **Select Key Reference** page appears.
**Key Column**: Field to use to match records to an account or debtor.

**Reference Field**: Field that ties the **Key Column** to the master, debtor, or service history table. The options are:

- **master.number**: Latitude account number in the master table.
- **Debtors.DebtorID**: Debtor number in the Latitude debtors table.
- **master.account**: Customer account number in the master table.
- **master.id1**: ID1 field in the master table.
- **master.id2**: ID2 field in the master table.
- **ServiceHistory.RequestID**: Unique request number for service information in the servicehistory table.

5. Specify the **Key Column** and **Reference Field** and then click **Next**. The **Select Column Conditions** page appears.
6. Clear the check box for each column to exclude from mapping.

7. To change the condition type for a column assigned the text condition type, click the column name and in the **Text Condition Type** list box, click the condition type.

8. Click **Next**. The **Add Table Wizard Completed** page appears.

9. Click **Finish**. The system adds the table or view to the **Condition Selection** pane in the **Configure Conditions** window.

**Create a Condition**

Use the **Conditions Type** pane to create a condition. This process requires familiarity with SQL and the Latitude database structure.
To create a condition

1. In the **Main Menu** window, from the **Tools** menu, click **Condition Builder**. The **Configure Conditions** window appears.

![Configure Conditions Window]({image_url})

2. In the **Condition Types** pane, click a condition type and drag and drop it onto a folder in the **Condition Selection** pane. For more information about condition types, see **Condition Types**.

![Condition Selection Pane]({image_url})

3. Type a name for the condition and press **Enter**.

4. In the **Properties** pane, specify the configuration settings for the condition. For more information, see **Condition Properties**.

5. If the condition has a **Joins** property and you want to copy the join to another condition, do the following:
   a. In the **Properties** pane, click **Copy Joins**.
   b. In the **Condition Selection** pane click the condition to copy the join to.
   c. In the **Properties** pane, click **Paste Joins**.

6. To arrange the properties in alphabetical order, click the Sort icon.

7. To arrange the properties by category, click the Categorize icon.
Add an Assembly File

Use the **Load Assembly** dialog box to add a .dll assembly file containing conditions that Latitude by Genesys created for your organization.

**To add an assembly file**

1. In the **Main Menu** window, from the **Tools** menu, click **Condition Builder**. The **Configure Conditions** window appears.

2. In the toolbar, click **Load Assembly**. The **Load Assembly** dialog box appears.
3. Click the assembly to add and then click Open. The system adds the assembly to the **Condition Selection** pane in the **Configure Conditions** window.

**Create a SQL File**

Use the **Script Conditions** dialog box to create a SQL file that contains the specified conditions. You can use the SQL file with other query tools or copy the SQL file contents directly into other programs.

**To create a SQL file**

1. In the **Main Menu** window, from the **Tools** menu, click **Condition Builder**. The **Configure Conditions** window appears.
2. In the toolbar, click **Script**. The **Script Conditions** dialog box appears.

3. Do one of the following:
   - To create a script of all the conditions, click **Script all conditions**. To recreate the conditions table, select **Recreate the conditions table**.
   - To create a script for specific conditions, click **Script the selected conditions** and then select the check box for each condition to include in the script.

4. Click **Okay**. The **Save Conditions Script** dialog box appears.
5. Type a name for the file and then click **Save**.

**Create a Folder**

Use the **Create Folder** option to create a folder for storing conditions. You can add new conditions or move existing conditions to the folder. You can also move the folder to the top tier so that it’s not embedded in another folder.

**To create a folder**

1. In the **Main Menu** window, from the **Tools** menu, click **Condition Builder**. The **Configure Conditions** window appears.
2. In the Condition Selection pane, click the place where you want to insert the folder.

3. In the toolbar, click Create Folder. The system adds a folder called New Folder to the Data Selection pane.

4. Type a name for the folder and press Enter.

5. To move existing conditions to the folder, in the Conditions Selection pane, click a condition and drag and drop it to the new folder.

6. To add a condition to the folder, do the steps to Add a Database Table or Create a Condition.

7. To move the folder to the top tier, do the steps to Move a Folder or Condition.

**Move a Folder or Condition**

Use the Move to Top option to move a folder or condition to the top tier so that it’s not embedded in another folder. You can also move a folder or condition to another folder.

**To move a folder or condition**

1. In the Main Menu window, from the Tools menu, click Condition Builder. The Configure Conditions window appears.
2. In the **Condition Selection** pane, click the folder or condition.

3. In the toolbar, click **Move to Top**. The system moves the selected folder or condition to the top tier.

4. To move a folder or condition to another folder, click the folder or condition and drag and drop it onto the folder where you want to move it.

**Delete a Folder or Condition**

Use the **Delete** option to delete a folder or condition.

**To delete a folder or condition**

1. In the **Main Menu** window, from the **Tools** menu, click **Condition Builder**. The **Configure Conditions** window appears.
2. In the **Condition Selection** pane, click the folder or condition.

3. In the toolbar, click **Delete**. A confirmation dialog box appears.

4. Click Yes.

**Test a Condition**

Use the **Move to Top** window to test a condition to ensure it's configured properly.

**To test a condition**

1. In the **Main Menu** window, from the **Tools** menu, click **Condition Builder**. The **Configure Conditions** window appears.
2. In the **Condition Selection** pane, click the condition.

3. In the toolbar, click **Test**. The **Condition Test Dialog** box appears and shows the progress as it tests each condition. If the system requires user input, the [condition name] dialog box appears. The information that appears in the [condition name] dialog box is based on the condition type.
4. If the [condition name] dialog box appears, keep the selected option or select a different option and then click **Okay**. A notification dialog box appears, which indicates whether the test was successful.

5. Click **OK**.

6. To display the SQL statement used to test a condition, in the **Condition Test Dialog** box, click the condition. The corresponding SQL statement appears in the lower section of the dialog box.

7. When finished viewing the test results, click **Close**.

**Condition Types**

The following condition types are available in Condition Builder.

<table>
<thead>
<tr>
<th>Condition Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom Queue Condition</td>
<td>Creates a condition for selecting a custom queue.</td>
</tr>
<tr>
<td>Date Condition</td>
<td>Creates a condition for selecting a date or a date and time.</td>
</tr>
<tr>
<td>Extra Data Condition</td>
<td>Creates a condition for selecting extra data.</td>
</tr>
<tr>
<td>Literal Condition</td>
<td>Packages a segment of SQL directly into a condition, requiring modification upon execution.</td>
</tr>
<tr>
<td>Misc. Extra Data Condition</td>
<td>Creates a condition for selecting miscellaneous extra data.</td>
</tr>
<tr>
<td>Multiple Choice Condition</td>
<td>Creates a condition for selecting values from a list of multiple options.</td>
</tr>
<tr>
<td>Numeric/Currency Condition</td>
<td>Creates a condition for selecting a numeric or currency value.</td>
</tr>
<tr>
<td>Queue Level Condition</td>
<td>Creates a condition for selecting a queue level.</td>
</tr>
<tr>
<td>Table Contains Condition</td>
<td>Creates a condition for looking up values in a Latitude database table or view.</td>
</tr>
<tr>
<td>Table Lookup Condition</td>
<td>Creates a condition for looking up values in a Latitude database table or view.</td>
</tr>
<tr>
<td>Text Condition</td>
<td>Creates a condition for selecting text.</td>
</tr>
</tbody>
</table>

**Condition Properties**

The following condition properties are available in Condition Builder, based on the condition type selected.
<table>
<thead>
<tr>
<th>Category</th>
<th>Condition Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appearance</td>
<td>Condition Type</td>
<td>Type of condition. The system populates this box when you create a condition and you cannot change it.</td>
</tr>
<tr>
<td></td>
<td>Description</td>
<td>Name of the condition.</td>
</tr>
<tr>
<td></td>
<td>Question</td>
<td>Question to ask when presenting a list of options in a multiple choice condition.</td>
</tr>
<tr>
<td>Behavior</td>
<td>Choices</td>
<td>Options available for selection in a multiple choice condition. Click the ellipsis to open the <strong>Choice Collection Editor</strong> dialog box and specify the options.</td>
</tr>
<tr>
<td></td>
<td>Data Type</td>
<td>Type of extra data or miscellaneous extra data. Valid values are:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• DateTime</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Numeric</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Text</td>
</tr>
<tr>
<td></td>
<td>Format</td>
<td>Data format to use for the numeric or currency condition. Valid values are:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Currency</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• None</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Percent</td>
</tr>
<tr>
<td>Data</td>
<td>Code</td>
<td>Code that identifies the extra data.</td>
</tr>
</tbody>
</table>
|          | Column | Column in the Latitude database table from which to get data. You can specify the column name or provide a SQL statement to indicate the column. **Column name example:** [master].[qlevel]  
**SQL statement example:** CASE ISDATE([master].[qdate]) WHEN 1 THEN CAST ([master].[qdate] AS DATETIME) ELSE NULL END |
|          | Joins | **Joined:** The system joins a key indexed column in the Latitude master database table to a column in another Latitude database table to get data.  
**Not Joined:** The data is in a column in the Latitude master database table.  
Click the ellipsis to open the **JoinTable Collection Editor** dialog box and specify the tables to join. |
|          | Line | Extra data line number from which to pull data. An extra data code can have up to five lines of data associated to it. |
| LookupExpression | Name of the Latitude database table or expression that yields the lookup values. The first column is the code value and the second column is the description. **Example:** SELECT [code].[QName] FROM [qlevel] WHERE [code] BETWEEN "600" AND "799"
| Select | SQL fragment used in the SQL statement SELECT clause.
| SelectColumn | Expression used to display the results of the lookup. **Example:** [SupportQueueItems].[QueueCode] + "-" +[SupportQueueLevel].[QName]
| SelectSubquery | Subquery expression to display as a list of values when using the condition as a select column. The subquery must return the field to display with an alias of [value] and cannot use an ORDER BY clause or any other SQL not permitted with a subquery.
| SQL | SQL fragment used in the SQL statement WHERE clause.
| Subquery | Subquery expression that yields the related data values.
| Title | Title of the miscellaneous extra data.

**Credit Report Requester**

**Credit Report Requester**

Use Credit Report Requester to create queries for requesting credit reports based on specific criteria. After creating the credit report requests, you can generate an export file in Latitude and transmit the file to specified CBR agencies using **SmartALX**.
1. **Toolbar**: Provides options for clearing, opening, saving, and running selection criteria, and counting the query results.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="clear.png" alt="Clear" /></td>
<td>Clears all query settings currently displayed in the window.</td>
</tr>
<tr>
<td><img src="open.png" alt="Open" /></td>
<td>Clears the query settings currently displayed in the window and opens a saved query.</td>
</tr>
<tr>
<td><img src="save.png" alt="Save" /></td>
<td>Saves the query settings currently displayed in the window.</td>
</tr>
<tr>
<td><img src="count.png" alt="Count" /></td>
<td>Sums the number of records that match the selection criteria.</td>
</tr>
</tbody>
</table>

2. **Data Selection pane**: Provides a list of data you can select to create a query.

3. **Conditions pane**: Allows you to set the conditions for retrieving data.

4. **Order pane**: Allows you to set the order for displaying or running data.

**Create a Credit Report Request Query**

Use the **Credit Report Requester** window to create a query to request credit bureau reports for accounts that meet specific criteria.

**To create a credit report request query**

1. In the **Main Menu** window, from the **Tools** menu, click **CBR Requester**. The **Credit Report Requester** window appears.
2. To limit the query results to a specific number of records, select **Maximum Records** and then, in the box, type the maximum number of records to include in the results.

3. In the **Conditions** pane, the **Debtor Type** condition is included by default. To modify the condition, do the following:

   a. Double-click the **Debtor Type** condition. The **Debtor Type** dialog box appears.

   b. Do one of the following:
      - To include a value, click **Value is one of the following**.
      - To exclude a value, click **Value is not one of the following**.
Select the debtors to include or exclude and then click **Okay**.

**Note:** To delete the condition, right-click the condition and then click **Delete**. In the confirmation dialog box, click **Yes**.

4. In the **Conditions** pane, do the following as necessary:
   - Create one or more conditions for the query.
   - Modify one or more conditions.
   - Modify the order of the conditions.
   - Group conditions for evaluation.

5. In the **Order** pane, do the steps to **Specify the Sort Order for Query Results**.

6. To count the number of records that match the selection criteria, in the toolbar, click **Count**. The results appear in the **Query Designer** dialog box. Click **OK**.

7. To save the query, do the following:
   a. In the toolbar, click **Save**. The **Save Query Dialog** box appears.

   ![Save Query Dialog](image)

   b. In the **Query Name** box, type a name for the query and then click **Save**.

   **Tip:** To overwrite an existing query, in the **Name** column, click the query to overwrite and then click **Save**.

8. To run the query to generate credit report requests, do the steps to **Generate Credit Report Requests**.

**Modify a Credit Report Request Query**

Use the **Credit Report Requester** window to modify a query for requesting credit reports.

**To modify a credit report request query**
1. In the Main Menu window, from the Tools menu, click CBR Requester. The Credit Report Requester window appears.

2. In the toolbar, click Open. A confirmation dialog box appears.

3. Click Yes. The Open Query Dialog box appears.

4. In the Name column, click the query and then click Open. The query appears in the Credit Report Requester window.

5. Modify the query as necessary.

6. To save the query, do the following:
   a. In the toolbar, click Save. The Save Query Dialog box appears.
b. In the **Query Name** box, type a name for the query and then click **Save**.

**Tip:** To overwrite an existing query, in the **Name** column, click the query to overwrite and then click **Save**.

7. To run the query to generate credit report requests, do the steps to [Generate Credit Report Requests](#).

**Generate Credit Report Requests**

Use the **Credit Report Requester** window to run a query to request credit bureau reports for accounts that meet specific criteria.

**To generate credit report requests**

1. [Create a Credit Report Request Query](#) or [Modify a Credit Report Request Query](#).
2. In the lower section of the **Credit Report Requester** window, in the **Credit Report Type** list box, click the type of report to request.

3. Click **Request**. The **CBR Requester** dialog box appears.

4. Click **Yes**. A notification dialog box appears, which indicates the requests are complete.

5. Click **OK**, and in the next dialog box, click **Close**.

6. When you are ready to transmit the requests to the specified credit bureau, do the steps to **Create a SmartALX Import File** and **Process Credit Bureau Report Requests Using SmartALX**.

### Custom Queue Manager

**Custom Queue Manager**

Use Custom Queue Manager to create custom queues of accounts that meet specific criteria. Users with the appropriate permissions can work the accounts without having to move them to another desk or queue level. You can also use Custom Queue Manager to maintain schedules for creating the custom queues. Latitude Custodian creates the queues at the specified time.
1. **Toolbar**: Provides options for clearing, opening, saving, and running selection criteria, and counting the query results.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Clear" /></td>
<td>Clears all query settings currently displayed in the window.</td>
</tr>
<tr>
<td><img src="image" alt="Open" /></td>
<td>Clears the query settings currently displayed in the window and opens a saved query.</td>
</tr>
<tr>
<td><img src="image" alt="Save" /></td>
<td>Saves the query settings currently displayed in the window.</td>
</tr>
<tr>
<td><img src="image" alt="Count" /></td>
<td>Sums the number of records that match the selection criteria.</td>
</tr>
</tbody>
</table>

2. **Data Selection pane**: Provides a list of data you can select to create a query.

3. **Conditions pane**: Allows you to set the conditions for retrieving data.

4. **Order pane**: Allows you to set the order for displaying or running data.
5. **Custom Queue Options section**: Allows you to set the options for creating the queue.

**Create a Custom Queue Query**

Use the **Build Custom Queue** window to create a query that creates a custom queue of accounts that meet specific criteria. Users with the appropriate permissions can work the accounts in the custom queue without having to move them out of their assigned desk and queue level.

**To create a custom queue query**

1. In the **Main Menu** window, from the **Tools** menu, click **Custom Queue Manager**. The **Custom Queue Manager** window appears.

2. In the toolbar, click **Build Queue**. The **Build Custom Queue** window appears.
Note: Exclude Duplicate Records is selected by default to prevent including the same account twice in the custom queue.

3. To limit the query results to a specific number of records, select Maximum Records and then, in the box, type the maximum number of records to include in the results.

4. In the Conditions pane, do the following as necessary:
   - Create one or more conditions for the query.
   - Modify one or more conditions.
   - Modify the order of the conditions.
   - Group conditions for evaluation.

Note: The system includes the following conditions by default. You can modify or remove them as necessary.

**Debtor has no restrictions**: You didn't select any restrictions on the Restrictions tab in the Debtor Details window.
Debtor has not filed bankruptcy: You didn’t provide any information on the Bankruptcy tab in the Debtor Details window.

Debtor is not represented by an attorney: You didn’t provide any information on the Attorney tab in the Debtor Details window.

5. In the Order pane, do the steps to Specify the Sort Order for Query Results.

6. To count the number of records that match the selection criteria, in the toolbar, click Count. The results appear in the Query Designer dialog box. Click OK.

7. To save the query, do the following:
   a. In the toolbar, click Save. The Save Query Dialog box appears.

   ![Save Query Dialog](image)

   b. In the Query Name box, type a name for the query and then click Save.

   Tip: To overwrite an existing query, in the Name column, click the query to overwrite and then click Save.

8. To run the query to create a custom queue, do the steps to Create a Custom Queue.

Modify a Custom Queue Query

Use the Build Custom Queue window to modify a query for creating custom queues.

To modify a custom queue query

1. In the Main Menu window, from the Tools menu, click Custom Queue Manager. The Custom Queue Manager window appears.
2. In the data grid, double-click the custom queue. The **Build Custom Queue** window appears.
3. In the toolbar, click **Open**. A confirmation dialog box appears.

4. Click **Yes**. The **Open Query Dialog** box appears.
5. In the Name column, click the query and then click Open. The query appears in the Build Custom Queue window.

6. Modify the query as necessary.

7. To save the query, do the following:
   a. In the toolbar, click Save. The Save Query Dialog box appears.

   b. In the Query Name box, type a name for the query and then click Save.

   Tip: To overwrite an existing query, in the Name column, click the query to overwrite and then click Save.

8. To run the query to create a custom queue, do the steps to Create a Custom Queue.
Create a Custom Queue

Use the **Build Custom Queue** window to create a custom queue based on a query of accounts that meet specific criteria.

**To create a custom queue**

1. **Create a Custom Queue Query** or **Modify a Custom Queue Query**.

2. In the **Custom Queue Options** section, do one of the following:

<table>
<thead>
<tr>
<th>To...</th>
<th>Then...</th>
</tr>
</thead>
</table>
   | **Append the query results to an existing queue...** | a. In the **Custom Queue** list box, click the queue name.  
   | | b. Click **Append selected accounts to the custom queue**.  
   | | **Note**: If the system placed accounts in the custom queue through multiple queries, it's possible that some accounts in the custom queue require follow-up and some don't. |
Overwrite an existing queue with the new query results...

| a. In the Custom Queue list box, click the queue name. |
| b. Click Overwrite the custom queue with the selected accounts. |

Save the query results to a new queue...

| In the Custom Queue list box, type a queue name. The name cannot contain spaces. |

3. To require follow-up on accounts in the custom queue, select the Require the user to set a follow up date on accounts worked in the custom queue check box. When the user deletes an account from the custom queue after working it, the system prompts the user to set the account follow-up date.

4. Click Build. The Build Custom Queue dialog box appears.

5. Click Yes. A message dialog box appears.

6. Click OK. Users with the appropriate permissions can select the custom queue from the Work Form and work the accounts in the queue.

Schedule a Custom Queue

Use the Schedule Custom Queue window to create a schedule for creating a custom queue. Custodian creates the custom queue at the specified time.

To schedule a custom queue

1. Create a Custom Queue Query or Modify a Custom Queue Query.
2. In the **Custom Queue Options** section, do one of the following:

<table>
<thead>
<tr>
<th>To...</th>
<th>Then...</th>
</tr>
</thead>
</table>
| Append the query results to an existing queue... | a. In the **Custom Queue** list box, click the queue name.  
b. Click **Append selected accounts to the custom queue**.  
**Note**: If the system placed accounts in the custom queue through multiple queries, it’s possible that some accounts in the custom queue require follow-up and some don’t. |
| Overwrite an existing queue with the new query results... | a. In the **Custom Queue** list box, click the queue name.  
b. Click **Overwrite the custom queue with the selected accounts**. |
| Save the query results to a new queue... | In the **Custom Queue** list box, type a queue name. The name cannot contain spaces. |
3. To require follow-up on accounts in the custom queue, select the **Require the user to set a follow up date on accounts worked in the customer queue** check box. When the user deletes an account from the custom queue after working it, the system prompts the user to set the account follow-up date.

4. Click **Schedule**. The **Schedule Custom Queue** window appears.

![Schedule Custom Queue Window]

5. In the **Schedule Title** box, type a name for the schedule that describes the custom queue to create.

6. Modify the query as necessary.

7. In the **Schedule** section, select the check box for each day you want Custodian to create the custom queue.

8. Click **OK**.

**Create a Custom Queue Schedule**

Use the **Schedule Custom Queue** window to create a schedule for creating a custom queue. Custodian creates the custom queue at the specified time.

**To create a custom queue schedule**

1. In the **Main Menu** window, from the **Tools** menu, click **Custom Queue Manager**. The **Custom Queue Manager** window appears.
2. In the toolbar, click **Modify Schedules.** The **Custom Queue Schedules** window appears.

3. In the toolbar, click **New Schedule.** The **Schedule Custom Queue** window appears.
4. In the **Schedule Title** box, type a name for the schedule that describes the custom queue to create.

5. Modify the query as necessary. For more information, see [Create a Custom Queue](#).

6. In the **Custom Queue Options** section, in the **Custom Queue** list box, click the custom queue to create.

7. In the **Schedule** section, select the check box for each day you want Custodian to create the custom queue.

8. Click **OK**.

**Modify a Custom Queue Schedule**

Use the **Custom Queue Schedules** window to modify a schedule for creating a custom queue. Custodian creates the custom queue at the specified time.

**To modify a custom queue schedule**

1. In the **Main Menu** window, from the **Tools** menu, click **Custom Queue Manager**. The **Custom Queue Manager** window appears.
2. In the toolbar, click **Modify Schedules**. The **Custom Queue Schedules** window appears.

3. In the data grid, click the schedule to modify.

4. In the toolbar, click **Edit Schedule**. The **Schedule Custom Queue** window appears.
5. Modify the schedule title, query, custom queue options, and schedule days as necessary.

6. Click OK.

Delete a Custom Queue Schedule

Use the Custom Queue Schedules window to delete a schedule for creating a custom queue.

To delete a custom queue schedule

1. In the Main Menu window, from the Tools menu, click Custom Queue Manager. The Custom Queue Manager window appears.
2. In the toolbar, click **Modify Schedules**. The **Custom Queue Schedules** window appears.

3. In the data grid, click the schedule to delete.

4. In the toolbar, click **Delete Schedule**. A confirmation dialog box appears.

5. Click **Yes**.

**Desk Mover**

**Desk Mover**

Use Desk Mover to create queries to move accounts to other desks based on specified selection criteria. This tool allows management to distribute accounts to collection agents for working.
The following options are available when moving accounts:

- Use desk case limits to control the number of accounts moved to a particular desk.
- Move linked accounts together, separately, or not at all.
- Change the queue level and queue date assigned to the moved accounts.

1. **Toolbar:** Provides options for clearing, opening, saving, and running selection criteria, and counting the query results.
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</tr>
<tr>
<td><img src="count.png" alt="Count" /></td>
<td>Sums the number of records that match the selection criteria.</td>
</tr>
</tbody>
</table>

2. **Data Selection pane**: Provides a list of data you can select to create a query.
3. **Conditions pane**: Allows you to set the conditions for retrieving data.
4. **Order pane**: Allows you to set the order for displaying or running data.
5. **Option tabs**: Allows you to set the options for moving desks.

**Create a Desk Mover Query**

Use the **Desk Mover** window to create a query for distributing accounts that meet specified criteria to other desks.

**To create a desk mover query**

1. In the **Main Menu** window, from the **Tools** menu, click **Desk Mover**. The **Desk Mover** window appears.
Note: The system selects the Exclude Duplicate Records check box to prevent including the same account twice in the query.

2. To limit the query results to a specific number of records, select Maximum Records and then, in the box, type the maximum number of records to include in the results.

3. In the Conditions pane, do the following as necessary:
   - Create one or more conditions for the query.
   - Modify one or more conditions.
   - Modify the order of the conditions.
• **Group conditions for evaluation.**

4. In the **Order** pane, do the steps to **Specify the Sort Order for Query Results.**

5. To count the number of records that match the selection criteria, in the toolbar, click **Count.** The results appear in the **Query Designer** dialog box. Click **OK.**

6. To save the query, do the following:

   a. In the toolbar, click **Save.** The **Save Query Dialog** box appears.

   b. In the **Query Name** box, type a name for the query and then click **Save.**

      **Tip:** To overwrite an existing query, in the **Name** column, click the query to overwrite and then click **Save.**

7. To run the query to distribute accounts to other desks, do the steps to **Distribute Accounts to Desks.**

**Modify a Desk Mover Query**

Use the **Desk Mover** window to modify a query for moving accounts to other desks.

**To modify a desk mover query**

1. In the **Main Menu** window, from the **Tools** menu, click **Desk Mover.** The **Desk Mover** window appears.
2. In the toolbar, click **Open**. The **Open Query Dialog** box appears.
3. In the **Name** column, click the query and then click **Open**. The query appears in the **Desk Mover** window.

4. Modify the query as necessary.

5. To save the query, do the following:
   a. In the toolbar, click **Save**. The **Save Query Dialog** box appears.

   b. In the **Query Name** box, type a name for the query and then click **Save**.

   **Tip:** To overwrite an existing query, in the **Name** column, click the query to overwrite and then click **Save**.

6. To run the query to distribute accounts to other desks, do the steps to **Distribute Accounts to Desks**.
Distribute Accounts to Desks

Use the Desk Mover window to distribute accounts that meet specified criteria to other desks. For example, your agency can assign new business to an inventory desk and then distribute the accounts to collectors using a saved query.

To distribute accounts to desks

1. Create a Desk Mover Query or Modify a Desk Mover Query.

Note: To sort the data grid, click a column heading.

Code: Code that identifies the desk.
**Name:** Name of the desk.

**Desk Type:** Type of desk.

**Case Count:** Number of accounts to distribute.

**Case Limit:** Maximum number of accounts that you can assign to a desk. If the value is "No Limit," you can assign an unlimited number of accounts to a desk.

**Distribute by number of accounts:** If selected, Desk Mover distributes the accounts to desks as equally as possible so that each desk receives about the same number of accounts.

**Distribute by account balance:** If selected, Desk Mover distributes the accounts as equally as possible based on the account balance so that each desk receives about the same account balance amount.

**Note:** Distribution is also based on the options you select on the Case Limitations and Linked Accounts tabs.

2. On the **Distribution** tab, select the check box for each desk to receive the accounts and then click a distribution option.

3. Click the **Case Limitations** tab.

   - **Use desk case limit as maximum accounts:** If selected, Desk Mover stops moving accounts to a desk once the desk reaches its case limit. Desk Mover either moves accounts to the next desk in the distribution that hasn't reached its case limit or, if there aren't any more desks in the distribution, stops moving the accounts.

   - **Impose no maximum accounts on selected desks:** If selected, Desk Mover ignores the case limits set for desks and distributes the accounts to desks equally.

4. Select an option and then click the **Linked Accounts** tab.
**Move the selected account and all linked accounts.** If selected, Desk Mover moves the accounts to another desk, along with all their linked accounts (even the ones that don't meet the query conditions).

**Move the selected account but not the unselected linked accounts.** If selected, Desk Mover moves the accounts to another desk, along with their linked accounts that meet the query conditions. It doesn’t move any of their linked accounts that don’t meet the query conditions.

**Do not move selected linked accounts.** If selected, Desk Mover doesn't move any linked accounts, even if they meet the query conditions.

5. Select an option and then click the **Queue** tab.

<table>
<thead>
<tr>
<th>Distribution</th>
<th>Case Limitations</th>
<th>Linked Accounts</th>
<th>Queue</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ] Change Queue Level:</td>
<td>000 - REMINDER</td>
<td>[ ] Change Queue Date:</td>
<td>2/29/2013</td>
</tr>
</tbody>
</table>

**Change Queue Level:** If selected, assigns a new queue level to the moved accounts.

[Queue Level]: Queue level to assign to the moved accounts.

**Change Queue Date:** If selected, assigns a new queue date (date to queue the account for work) to the moved accounts.

[Queue Date]: Queue date to assign to the moved accounts.

6. In the lower section of the Desk Mover window, click **Process**. The **Analyzing Accounts** dialog box appears.

7. Click **Process**. A confirmation dialog box appears.

8. Review the information and then click **Yes**. A notification dialog box appears, indicating the process is complete.

9. Click **OK**.

**Letter Requester**

**Letter Requester**

Use Letter Requester to create queries to request letters based on specified selection criteria.
1. **Toolbar**: Provides options for clearing, opening, saving, and running selection criteria, and counting the query results.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Clear Icon]</td>
<td>Clears all query settings currently displayed in the window.</td>
</tr>
</tbody>
</table>
Clears the query settings currently displayed in the window and opens a saved query.

Saves the query settings currently displayed in the window.

Sums the number of records that match the selection criteria.

Runs the query and displays the results on the Results tab.

2. **Data Selection pane**: Provides a list of data you can select to create a query.
3. **Conditions pane**: Allows you to set the conditions for retrieving data.
4. **Order pane**: Allows you to set the order for displaying or running data.
5. **Select Letter section**: Allows you to select the letter to request.
6. **Options section**: Allows you to set the letter selection options.

**Create a Letter Request Query**

Use the Letter Requester window to create a query to request letters.

**To create a letter request query**

1. In the **Main Menu** window, from the **Tools** menu, click **Letter Requester**. The Letter Requester window appears.
Note: The system selects the **Exclude Duplicate Records** check box to prevent including the same account twice in the letter request.

2. To limit the query results to a specific number of records, select **Maximum Records** and then, in the box, type the maximum number of records to include in the results.

3. In the **Conditions** pane, the **Debtor Type** condition is included by default. To modify the condition, do the following:
   a. Double-click the **Debtor Type** condition. The **Debtor Type** dialog box appears.
b. Do one of the following:
   - To include a value, click **Value is one of the following**.
   - To exclude a value, click **Value is not one of the following**.
   - Select the debtors to include or exclude and then click **Okay**.

   **Note**: To delete the condition, right-click the condition and then click **Delete**. In the confirmation dialog box, click **Yes**.

4. In the **Conditions** pane, do the following as necessary:
   - **Create one or more conditions for the query**.
   - **Modify one or more conditions**.
   - **Modify the order of the conditions**.
   - **Group conditions for evaluation**.

5. In the **Order** pane, do the steps to **Specify the Sort Order for Query Results**.

6. To count the number of records that match the selection criteria, in the toolbar, click **Count**. The results appear in the **Query Designer** dialog box. Click **OK**.

7. To save the query, do the following:
   a. In the toolbar, click **Save**. The **Save Query Dialog** box appears.
b. In the **Query Name** box, type a name for the query and then click **Save**.

**Tip**: To overwrite an existing query, in the **Name** column, click the query to overwrite and then click **Save**.

8. To run the query to generate letter requests, do the steps to [Generate Letter Requests](#).

**Modify a Letter Request Query**

Use the **Letter Requester** window to modify a query for requesting letters.

**To modify a letter request query**

1. In the **Main Menu** window, from the **Tools** menu, click **Letter Requester**. The **Letter Requester** window appears.
2. In the toolbar, click **Open**. A confirmation dialog box appears.

3. Click **Yes**. The **Open Query Dialog** box appears.
4. In the **Name** column, click the query and then click **Open**. The query appears in the **Letter Requester** window.

5. Modify the query as necessary.

6. To save the query, do the following:
   a. In the toolbar, click **Save**. The **Save Query Dialog** box appears.

   b. In the **Query Name** box, type a name for the query and then click **Save**.

   **Tip**: To overwrite an existing query, in the **Name** column, click the query to overwrite and then click **Save**.

7. To run the query to generate letter requests, do the steps to **Generate Letter Requests**.
Generate Letter Requests

Use the Letter Requester window to run a query to request letters for accounts that meet specific criteria.

To generate letter requests

1. Create a Letter Request Query or Modify a Letter Request Query.

2. In the Select Letter section, click the letter to request. The options that are available in the Options section are based on the letter type selected. For more information about a letter type, see the Letter Console documentation.
3. Complete the information in the **Options** section.

<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount Due</td>
<td>Use linked balance: If selected, the combined balance of all linked accounts displays as the debtor's account balance in the letter.</td>
</tr>
<tr>
<td>Settlement %</td>
<td>Settlement percent to include in the letter. To specify this amount, clear the <strong>Use customer blanket settlement</strong> check box.</td>
</tr>
<tr>
<td>Use customer blanket settlement</td>
<td>If selected, the system includes in the letter the blanket settled-in-full (SIF) percent specified on the <strong>Fees</strong> tab in the <strong>Customer Properties</strong> window.</td>
</tr>
<tr>
<td>Installments</td>
<td>Number of installments to indicate in a multi-part settlement letter. The system allows up to six installments.</td>
</tr>
<tr>
<td>Use account desk for sending user</td>
<td>If selected, the account desk displays as the letter sender.</td>
</tr>
<tr>
<td>Due Date(s) 1st through 6th</td>
<td>Due dates to include in the letter for the settlement or each multi-part settlement installment. To specify these dates, select the <strong>Include due dates on letter</strong> check box.</td>
</tr>
<tr>
<td>Include due dates on letter</td>
<td>If selected, the system includes in the letter the due date for the settlement or each multi-part settlement installment.</td>
</tr>
</tbody>
</table>

4. In the lower section of the **Letter Requester** window, click **Process**. The **Letter Request** dialog box appears.

5. Click **Process**. A confirmation dialog box appears.

6. Click **Yes**. A notification dialog box appears.

7. Click **OK**. Use Letter Console to print the letters. For more information, see the Letter Console documentation.
Pool Queue Manager

Use Pool Queue Manager to create a pool queue based on specified criteria and assign collectors to it. The system updates pool queues regularly as you add or modify data in Latitude. Multiple collectors can work the same pool queue; however, you can only assign collectors to one pool queue at a time.

1. **Pool Options section**: Allows you to set options for the pool queue.

2. **Toolbar**: Provides options for clearing, opening, saving, and running selection criteria, and counting the query results.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Clear icon]</td>
<td>Clears all query settings currently displayed in the window.</td>
</tr>
<tr>
<td>![Open icon]</td>
<td>Clears the query settings currently displayed in the window and opens a saved query.</td>
</tr>
<tr>
<td>![Save icon]</td>
<td>Saves the query settings currently displayed in the window.</td>
</tr>
</tbody>
</table>
Sums the number of records that match the selection criteria.

3. Data Selection pane: Provides a list of data you can select to create a query.
4. Conditions pane: Allows you to set the conditions for retrieving data.
5. Order pane: Allows you to set the order for displaying or running data.

Create a Pool Queue

Use the Create New Pool window to create a pool queue that assigned users can work.

To create a pool queue

1. In the Main Menu window, from the Tools menu, click Pool Queue Manager. The Pool Queue Manager window appears.

2. In the toolbar, click Create New Pool. The Create New Pool window appears.
3. In the **Pool Options** section, do the following:
   - In the **Name** box, type a name for the pool queue.
   - In the **Description** box, type a description for the pool queue.
   - In the **Queue Ahead** box, type or use the arrows to indicate the number of accounts to store in the pool queue. When the system reaches this number, it retrieves the next batch of accounts from the server and places them in the pool queue. Retrieving accounts in batches optimizes system performance.

4. In the **Conditions** pane, the system includes a condition by default to indicate that the system doesn’t restrict the pool queue to the users’ desk. If you only want collectors to work accounts assigned to their current desk that meet the specified criteria, right-click the condition and then click **Delete**. In the confirmation dialog box, click **Yes**.

5. Do the following as necessary:
   - **Create one or more conditions for the query.**
   - **Modify one or more conditions.**
   - **Modify the order of the conditions.**
• **Group conditions for evaluation.**

6. In the **Order** pane, do the steps to **Specify the Sort Order for Query Results**.

7. To count the number of records that match the selection criteria, in the toolbar, click **Count**. The results appear in the **Query Designer** dialog box. Click **OK**.

8. To save the query, do the following:

   a. In the toolbar, click **Save**. The **Save Query Dialog** box appears.

   ![Save Query Dialog](image)

   b. In the **Query Name** box, type a name for the query and then click **Save**.

   **Tip:** To overwrite an existing query, in the **Name** column, click the query to overwrite and then click **Save**.

9. Click **OK**. The system creates the pool queue and closes the **Create New Pool** window.

10. To assign users to the pool queue, do the steps to **Assign Users to a Pool Queue**.

**Modify a Pool Queue**

Use the **Modify Existing Pool** window to modify a pool queue.

**To modify a pool queue**

1. In the **Main Menu** window, from the **Tools** menu, click **Pool Queue Manager**. The **Pool Queue Manager** window appears.
2. In the data grid, click the pool queue.
3. In the toolbar, click **Modify Selected Pool**. The **Modify Existing Pool** window appears.

4. Modify the query as necessary.

5. To save the query, do the following:
   a. In the toolbar, click **Save**. The **Save Query Dialog** box appears.
b. In the **Query Name** box, type a name for the query and then click **Save**.

**Tip:** To overwrite an existing query, in the **Name** column, click the query to overwrite and then click **Save**.

6. Click **OK**. The system updates the pool queue and closes the **Modify Existing Pool** window.

7. To assign users to the pool queue, do the steps to **Assign Users to a Pool Queue**.

### Delete a Pool Queue

Use the **Pool Queue Manager** window to delete a pool queue.

**To delete a pool queue**

1. In the **Main Menu** window, from the **Tools** menu, click **Pool Queue Manager**. The **Pool Queue Manager** window appears.

2. In the data grid, click the pool queue to delete

3. In the toolbar, click **Delete Selected Pool**. A confirmation dialog box appears.
4. Click Yes.

Assign Users to a Pool Queue

Use the **Assign Users to Pool** window to assign users to a pool queue.

To assign users to a pool queue

1. In the **Main Menu** window, from the **Tools** menu, click **Pool Queue Manager**. The **Pool Queue Manager** window appears.

2. In the data grid, click the pool queue to assign users to.

3. In the toolbar, click **User Assignments**. The **Assign Users to Pool** dialog box appears.

4. Select the check box for each user to assign to the queue.

5. To assign all users not assigned to another pool queue to this pool queue, select **Set this pool to be the default pool for unassigned users**.

6. Click **OK**.
SQL Author

Use SQL Author to create and store custom SQL statements. The system generates SQL statements based on the settings you specify and displays them in the lower section of the SQL Author window. You can save these statements for use in other query tools or programs.

1. **Toolbar**: Provides options for clearing, opening, saving, and running selection criteria, and counting the query results.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Clear" /></td>
<td>Clears all query settings currently displayed in the window.</td>
</tr>
<tr>
<td><img src="image" alt="Open" /></td>
<td>Clears the query settings currently displayed in the window and opens a saved query.</td>
</tr>
<tr>
<td><img src="image" alt="Save" /></td>
<td>Saves the query settings currently displayed in the window.</td>
</tr>
<tr>
<td><img src="image" alt="Count" /></td>
<td>Sums the number of records that match the selection criteria.</td>
</tr>
</tbody>
</table>

2. **Data Selection pane**: Provides a list of data you can select to create a query.

3. **Select Columns pane**: Allows you to select and arrange the columns of data to display in the query results.

4. **Conditions pane**: Allows you to set the conditions for retrieving data.

5. **Order pane**: Allows you to set the order for displaying or running data.

6. **SQL statement section**: Displays the SQL statement based on the conditions, columns, and order specified.

**Create a SQL Statement**

Use the **SQL Author** window to create a custom SQL statement based on specified criteria.

**To create a SQL statement**

1. In the **Main Menu** window, from the **Tools** menu, click **SQL Author**. The **SQL Author** window appears.
2. To exclude duplicate records from the query results, select **Exclude Duplicate Records**.

3. To limit the query results to a specific number of records, select **Maximum Records** and then, in the box, type the maximum number of records to include in the results.

4. In the **Select Columns** pane, do the following as necessary:
   - **Add one or more columns to the query.**
   - **Delete one or more columns from the query.**
   - **Modify the order of the columns.**
   - **Rename any columns.**

5. In the **Conditions** pane, do the following as necessary:
   - **Create one or more conditions for the query.**
   - **Modify one or more conditions.**
   - **Modify the order of the conditions.**
• **Group conditions for evaluation.**

6. In the **Order** pane, do the steps to **Specify the Sort Order for Query Results**.

   | **Note:** As you create the query, the SQL statement appears in the SQL statement panel.

7. To count the number of records that match the selection criteria, in the toolbar, click **Count**. The results appear in the **Query Designer** dialog box. Click **OK**.

8. To save the query, do the following:

   a. In the toolbar, click **Save**. The **Save Query Dialog** box appears.

   ![Save Query Dialog](image)

   b. In the **Query Name** box, type a name for the query and then click **Save**.

   **Tip:** To overwrite an existing query, in the **Name** column, click the query to overwrite and then click **Save**.

   You can run the saved query using another query tool or copy and paste the SQL statement into another program.

9. To copy the SQL statement so you can paste it into another program, do the following:

   a. In the **SQL statement panel**, use your mouse to select all the content in the pane.

   b. Right-click on the selected content and click **Copy**. The system copies the statement to the Clipboard. You can now paste it into another program.

**Modify a SQL Statement**

Use the **SQL Author** window to modify a custom SQL statement.

**To modify a SQL statement**

1. In the **Main Menu** window, from the **Tools** menu, click **SQL Author**. The **SQL Author** window appears.
2. In the toolbar, click **Open**. The **Open Query Dialog** box appears.
3. In the **Name** column, click the query and then click **Open**. The query appears in the **SQL Author** window.

4. Modify the query as necessary.

5. To save the query, do the following:

   a. In the toolbar, click **Save**. The **Save Query Dialog** box appears.

   b. In the **Name** column, click the query name and then click **Save**.

   **Tip:** To create a query from the existing query, in the **Query Name** box, type a name for the query and then click **Save**. The system creates a query and leaves the original query unchanged.

You can run the saved query using another query tool or copy and paste the SQL statement into another program.
6. To copy the SQL statement so you can paste it into another program, do the following:
   a. In the SQL statement panel, use your mouse to select all the content in the pane.
   b. Right-click on the selected content and click **Copy**. The system copies the statement to the Clipboard. You can now paste it into another program.

**Assign an Aggregate Function to a Column**

Use the **Select Columns** pane in **Account Analysis** or **SQL Author** window to assign an aggregate function to a column. When you run the query, the aggregated values display in the column instead of the actual value. Non-aggregated columns create the groups that the aggregate data represents.

**To assign an aggregate function to a column**

1. Do one of the following:
   - Create an Account Analysis Query or Modify an Account Analysis Query.
   - Create a SQL Statement or Modify a SQL Statement.

2. In the **Select Columns** pane, click the column and then, in the toolbar, click the Aggregate icon.

3. Click a function. The original column name appears with the aggregate function name appended. For example, if you selected the "average" function for the **Current Balance** column, the **Current Balance** column name changes to **Average of Current Balance**.

4. To delete an aggregated function, click the column name and then click the Aggregate icon.
**Aggregate Functions**

The following table describes the functions that are available when aggregating data. The functions available for an item are based on the item’s data type.

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Count</td>
<td>Counts the number of records for the grouping.</td>
</tr>
<tr>
<td>Sum</td>
<td>Totals the values within the grouping.</td>
</tr>
<tr>
<td>Average</td>
<td>Averages the values within the grouping.</td>
</tr>
<tr>
<td>Maximum</td>
<td>Calculates the highest value within the grouping.</td>
</tr>
<tr>
<td>Minimum</td>
<td>Calculates the lowest value within the grouping.</td>
</tr>
<tr>
<td>Standard Deviation</td>
<td>Averages the difference from the mean value of the entire set of accounts included.</td>
</tr>
<tr>
<td>Population Standard Deviation</td>
<td>Averages the difference from the mean value within the grouping.</td>
</tr>
<tr>
<td>Variance</td>
<td>Squares the standard deviation.</td>
</tr>
<tr>
<td>Population Variance</td>
<td>Squares the standard deviation within the grouping.</td>
</tr>
<tr>
<td>Eliminate Duplicates</td>
<td>Changes the equation to add the &quot;distinct&quot; clause. You can use this function with any aggregate after the initial selection.</td>
</tr>
<tr>
<td>Remove Aggregate</td>
<td>Deletes the aggregate function and returns the column to its literal value.</td>
</tr>
</tbody>
</table>

**Status Changer**

**Status Changer**

Use Status Changer to change the status for groups of accounts based on specified criteria.
1. **Toolbar**: Provides options for clearing, opening, saving, and running selection criteria, and counting the query results.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="clear.png" alt="Clear" /></td>
<td>Clears all query settings currently displayed in the window.</td>
</tr>
<tr>
<td><img src="open.png" alt="Open" /></td>
<td>Clears the query settings currently displayed in the window and opens a saved query.</td>
</tr>
<tr>
<td><img src="save.png" alt="Save" /></td>
<td>Saves the query settings currently displayed in the window.</td>
</tr>
<tr>
<td><img src="count.png" alt="Count" /></td>
<td>Sums the number of records that match the selection criteria.</td>
</tr>
</tbody>
</table>
2. **Data Selection pane:** Provides a list of data you can select to create a query.

3. **Conditions pane:** Allows you to set the conditions for retrieving data.

4. **Order pane:** Allows you to set the order for displaying or running data.

5. **New Status section:** Allows you to specify the status to change the accounts to.

**Create an Account Status Change Query**

Use the **Status Changer** window to create a query for changing the status of a group of accounts that meet specified criteria.

**To create an account status change query**

1. In the **Main Menu** window, from the **Tools** menu, click **Status Changer**. The **Status Changer** window appears.
2. In the **Conditions** pane, do the following as necessary:
   - Create one or more conditions for the query.
   - Modify one or more conditions.
   - Modify the order of the conditions.
   - Group conditions for evaluation.

3. In the **Order** pane, do the steps to Specify the Sort Order for Query Results.

4. To count the number of records that match the selection criteria, in the toolbar, click **Count**. The results appear in the **Query Designer** dialog box. Click **OK**.

5. To save the query, do the following:
a. In the toolbar, click Save. The **Save Query Dialog** box appears.

![Save Query Dialog](image)

b. In the **Query Name** box, type a name for the query and then click **Save**.

**Tip:** To overwrite an existing query, in the **Name** column, click the query to overwrite and then click **Save**.

6. To run the query to change the status of accounts, do the steps to Change the Status of a Group of Accounts.

### Modify an Account Status Change Query

Use the **Status Changer** window to modify a query for changing the status of a group of accounts that meet specified criteria.

**To modify an account status change query**

1. In the **Main Menu** window, from the **Tools** menu, click **Status Changer**. The **Status Changer** window appears.
2. In the toolbar, click **Open**. The **Open Query Dialog** box appears.
3. In the **Name** column, click the query and then click **Open**. The query appears in the **Credit Report Requester** window.

4. Modify the query as necessary.

5. To save the query, do the following:
   a. In the toolbar, click **Save**. The **Save Query Dialog** box appears.

   b. In the **Query Name** box, type a name for the query and then click **Save**.

   **Tip:** To overwrite an existing query, in the **Name** column, click the query to overwrite and then click **Save**.

6. To run the query to change the status of accounts, do the steps to **Change the Status of a Group of Accounts**.
Change the Status of a Group of Accounts

Use the Status Changer window to run a query to change the status of a group of accounts that meet specified criteria.

To change the status of a group of accounts

1. Create an Account Status Change Query or Modify an Account Status Change Query.

2. In the New Status section, in the Change Status list box, click the status to change the accounts to.

3. If you chose to assign a closed status (indicated in red) to the accounts and you want the queue level set to 999 (closed and returned), select Return closed accounts to customer.
4. Click **Okay**. The **Status Change Analysis** dialog box appears.

5. Click **Process**. A confirmation dialog box appears.

6. Click **Yes**. A notification dialog box appears, indicating the process is complete.

7. Click **OK**.

**Import Excel**

**Import Excel**

Use Import Excel to import data from a Microsoft Excel spreadsheet into a Latitude database. All data that is available in Latitude resides in a Microsoft SQL Server database.

**Requirements**

Following is a list of requirements for using Import Excel.

- You have Microsoft Excel installed on workstations that are running Import Excel.
- Worksheets within a spreadsheet cannot contain spaces in their names.
- The first row of a worksheet contains the column names and each column name is unique.
- Data in the spreadsheet is contiguous, meaning that all rows (following the first row) must contain the data to import, without totals or subtotals. We recommend that you place the word “LAST” in the first column of the last row to signal the program to stop reading in data.
- We recommend that you format numeric data as text to prevent a truncation issue where Microsoft Excel drops numbers over 15 digits in length.
- Names are in comma-delimited form (Smith, John). Import Excel doesn't read dashes or other formatting properly.
- The system separates dates by a space, comma, dash, or slash.
- Cells of numeric data aren't blank.
Specify the Import Settings

Use the Pre-Import Set Up tab in the Import Excel window to specify the settings for importing new accounts from a Microsoft Excel spreadsheet into Latitude. The spreadsheet contains one or more worksheets. You can only import one worksheet at a time. You obtain the spreadsheet from your customer or other account information provider. Save the file to a location you can access from your workstation.

To specify the import settings

1. In the Main Menu window, from the Apps menu, click Import Excel. The Import Excel window appears.

2. In the Select a Customer list box, click the customer for whom to import new accounts.

3. In the Select a Desk list box, click the desk to assign to the accounts. We recommend that you import accounts into an inventory desk for pre-collection activities (such as generating credit reports) and then distribute the accounts to collectors using the Desk Mover tool.
4. In the **Select a First Letter** list box, click the first letter to request for the imported accounts. After generating the letter requests, they are available for printing using Letter Console.

   **Note**: The system generates letters for the primary debtor only. To generate letters for co-debtors, use Letter Requester.

5. In the **Date Accounts Were Received** list box, click the date you received the accounts.

6. In the **Select an Excel Spreadsheet** box, do the following:
   - Click in the box. The **Open** dialog box appears.
   - Click the Microsoft Excel file or comma-separated value (CSV) file to import and then click **Open**. The system populates the **Select an Excel Spreadsheet** box with the path and file name. The system populates the **Select a Worksheet** list box with the worksheets contained in the spreadsheet.

7. In the **Select a Worksheet** list box, click the worksheet to import.

8. In the **Select a Layout** list box, click the file layout to use. If you are importing new business for the first time for this customer, leave the default value of **New Layout** selected. If you imported new business for this customer previously and the layout hasn't changed, choose the saved layout.

9. If you don't want to import duplicate accounts, leave the **Do Not Allow Duplicate Accounts** check box selected.

10. If you want to add collection charges to accounts when importing the accounts, do the following:
   a. Select the **Add Collection Charges to Accounts** check box. The **Collection Charges** section appears.
   
      ![Step 4: Select Options](image)

      ![Step 4: Collection Charges](image)

   b. In the **Enter Fee To Apply** box, type the collection fee percent to apply to the accounts.
   c. To select a money bucket to store the fees, in the **Bucket** list box, click the money bucket.

      The system creates a DAR (increasing adjustments) batch for the accounts that your agency can process, which increases the debtor’s balance accordingly.

11. You are ready to map the worksheet to the Latitude database. For more information, see Map the Import Worksheet.

**Map the Import Worksheet**

Use the **Import** tab in the **Import Excel** window to map the columns in the Microsoft Excel worksheet to the Latitude database. The **Import** tab is unavailable until you populate the **Pre-Import Set Up** tab.
If a column of data doesn't meet Latitude date and money field requirements, format the data before importing it. The requirements include:

- Separate dates with dashes or slashes (for example, MM/DD/YYYY or MM-DD-YYYY).
- Format money as numeric, meaning they cannot contain dollar signs or periods.

**To map the Import worksheet**

1. In the **Main Menu** window, from the **Apps** menu, click **Import Excel**. The **Import Excel** window appears.

2. Complete the **Pre-Import Set Up** tab. For more information, see [Specify the Import Settings](#).

3. Click the **Import** tab.
The system selects the first column in the worksheet by default. The column name and whether you mapped the column appears in the middle of the tab under the data grid. In the example, the user selected the **AccountID** column and the message indicates that the user didn't map it.

4. To format the selected import column, click **Format** to display the formatting options and then do one of the following:

- To remove commas and dollar signs from data you are importing into date or money fields, click **Convert to Number**.

- To insert a date into the blank rows in the selected column, click **Insert Default Date**. In the **Default Date** dialog box, type the date to insert and then click **OK**. The system populates all blank rows in the selected column with the specified date.
To append data to every row in the selected column, click **Append Data**. In the Append Data dialog box, type the data to append and then click **OK**. The system adds the specified data to the end of the existing data for every row in the selected column.

To format dates that don't have separators so that the system recognizes them as dates, click the **String to Date Format** option and then click **Go**. The system inserts separators in each row in the selected column so that the system recognizes the data as a date type.

5. In the **Select Data Mapping** section, in the list box, click the field in the Latitude database to map to the selected import column.

   **Primary Debtor**: List of debtor 1 or master account fields.

   **Co-Debtor**: List of co-debtor fields.

   **Dates**: List of date fields.

   **Money/Numeric**: List of interest rate and money bucket fields.

   **Note/Extra Data**: List of note or extra data fields.

   **Note**: To skip mapping the selected column, click the **Ignore Column** check box. The system doesn't import the column of data.

6. To move to the next column, click the right arrow icon.

7. Format and map the column as necessary. Continue moving through the columns until you have mapped all columns or marked them to ignore.

8. To change the mapping, select the **Re-Map Column** check box and then select the field from the appropriate list box in the **Select Data Mapping** section.

9. After mapping (or ignoring) all columns, click **Begin Import**. The **New Layout** dialog box appears.

10. Type a name for the layout and then click **OK**. The system saves the layout and it's available for selection for future imports. When importing is complete, the **Import Excel New Business Display** window appears.
11. Use the arrows in the lower section of the window to scroll through and review the imported data. After reviewing the data, click Exit. The Confirm Load dialog box appears.

12. Click Yes. A confirmation dialog box appears.

13. Click Yes.

**Note:** If you chose to add collection charges to the imported accounts, a notification dialog box appears. This dialog box displays the number of the batch created so you can add the fees to the account balance. Write down this number so you can process the batch when you are ready. For more information, see Process a Batch. When you process the batch, the system does the following for each imported account:
• Populates the money bucket that you specified when you set up the import with the collection charges.
• Adds the collection charges to the current account balance.
• Adds a note to the Notes panel that indicates the adjustment amount and date.

Supervisor Options

Supervisor Options
Supervisors with the appropriate permissions can change the "Account Should Queue" and "Restricted Access" settings, and audit accounts.

Change "Account Should Queue" Setting
Use the "Account Should Queue" option in the Special menu to indicate whether a collector can continue to work an account in the Collector queue after placement in a Clerical or Supervisor queue.

To change the "Account Should Queue" setting
• With an account displayed in the Work Form, from the special menu, click Account Should Queue to change the setting.

Note: If there is a check mark next to the Account Should Queue option, the account continues to appear in the Collector queue so the collector can work it. If there isn’t a check mark, the account does not appear in the Collector queue and the collector cannot work it.

Change "Restricted Access" Setting
Use the "Restricted Access" option in the Special menu to indicate whether the system requires the Accounts - Restricted Access Accounts permission to view an account.

To change the "Restricted Access" setting
• With an account displayed in the Work Form, from the Restrictions menu, click Restricted Access to change the setting.
Note: If there is a check mark next to the Restricted Access option, the system restricts viewing the account to users with the Accounts - Restricted Access Accounts permission. If there isn’t a check mark, the system doesn’t restrict viewing of the account.

Audit an Account

Supervisors can use the Supervisor Audit window to audit accounts that each desk can view or work. Accounts display for the selected desk and date, sorted by the time the desk first viewed the account.

To audit an account

1. With an account displayed in the Work Form, from the Search menu, click Audit. The Supervisor Audit window appears.

2. Do one of the following:
   - To audit a user, click Audit a User.
   - To audit a desk, click Audit a Desk.

3. In the list box, click the user or desk.

4. To change the date for which to audit accounts, in the Select a Date list box, click or type the date.

5. Click Build List. The Selected Totals dialog box appears, indicating the number of accounts that the user or desk viewed and the time spent on the accounts.
6. Click OK. The audit list appears in the **Supervisor Audit** window. All accounts that the user or desk viewed or worked on the specified date appear.

7. To review an account, click the row. The system minimizes the **Supervisor Audit** window and displays the selected account in the **Work Form**.

**Credit Bureau Reporting Console**

Credit Bureau Reporting Console allows your organization to configure Latitude for reporting accounts to credit bureaus. For information about using Credit Bureau Reporting Console, see the *Credit Bureau Reporting Console* documentation.
To open the Credit Bureau Reporting Console window

- In the Main Menu window, from the Maintenance menu, click Credit Bureau Reporting Console. The Credit Bureau Reporting Console window appears.

Credit Bureau Reporting Wizard

Credit Bureau Reporting Wizard allows your organization to create files that contain account information to send to credit bureaus for reporting purposes. For information about using Credit Bureau Reporting Wizard, see the Credit Bureau Reporting Wizard documentation.

To open Credit Reporting Wizard

- In the Main Menu window, from the Tools menu, click Credit Reporting Wizard. The Credit Reporting Wizard window appears.
Goals Manager

Goals Manager allows your organization to view statistical information for collectors, supervisors, managers, and owners. For information about using Goals Manager, see the Goals Manager documentation.

To open Goals Manager

- In the Main Menu window, from the Apps menu, click Goals Manager. The Goals Manager window appears.

Letter Console

Letter Console integrates with Latitude to allow you to generate letters for accounts. Your company can create and modify custom letters to merge with account data for any classification of debtor. You can send custom letters to a third-party letter service for printing, along with data files containing the account information you specify. You can also save an electronic image of each letter sent and attach it
to the debtor record for viewing at any time. For information about using Letter Console, see the Letter Console documentation.

**Note**: Letter Console requires Microsoft Word on the client workstation used to print or generate letters.

**To open Letter Console**

- In the **Main Menu** window, from the **Apps** menu, click **Letter Console**. The **Letter Console** window appears.

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**Security**

Premises-based clients can use Windows authentication to bind Latitude users to their Windows identity to permit logging on to Latitude automatically. Windows authentication is not available for hosted clients. If your agency is not using Windows authentication with Latitude, you can specify security parameters using the **Latitude Permissions and Policies Editor**. For more information, see **Security Permissions and Policies**.
Server Processes

The following programs run on the Latitude server nightly, weekly or as needed. You can set them up as a Windows Scheduled Task.

Latitude Custodian Editor

Latitude Custodian Editor runs as a scheduled task on your Latitude server. The program performs system clean-up tasks, builds daily work queues, schedules letters, schedules promises (kept and broken), and calculates simple interest. You install this program on a workstation in your network. Typically, Latitude by Genesys maintains this program; however, you can customize the settings.

Dialer Update

Building Queues for the Dialer Update program.

Database backup

For more information, see Back Up the Latitude Database.

Back Up the Latitude Database

Latitude by Genesys recommends that your agency run database backup procedures at least once nightly, and follow network best practices. The preferred methodology is to back up to a file, then copy the file to a tape. The following instructions are for Microsoft SQL Server 2008 R2. These instructions assist you in setting up the process for backing up your Latitude database to a file. Follow your backup software’s recommended guidelines for copying the database backup file you create.

To back up the Latitude database

1. Click Start > All Programs > Microsoft SQL Server 2008 R2 > SQL Server Management Studio. The Microsoft SQL Server Management Studio window appears.
2. Expand the Databases folder and click your database name.
3. Right-click the database name, click Tasks, and then click Back Up... The Back Up Database dialog box appears.
4. To change the default backup name, in the Backup set section, in the Name box, type the backup name.
5. (Optional) In the Description box, type a description of the backup.
6. Specify when the backup set expires.
7. To create a database backup file, do the following:
   a. In the Destination section, click Add. The Select Backup Destination dialog box appears.
   b. Click File name and then click the ellipsis (…) The Locate Database Files dialog box appears.
c. Click the folder where you want to save the backup file.
d. In the File name box, type a file name and then click OK.
e. In the Select Backup Destination dialog box, click OK.

8. In the Destination section, click the entry you just created and then click OK. The backup progress appears in the Progress section. When the backup is complete, a notification dialog box appears.

9. Click OK.

10. Follow your backup software’s recommended procedure for backing this file up to tape or disk.

Update the ABA Routing Table

Update your Latitude ABA reference table with the latest bank information on a quarterly basis. New files are available each year toward the end of January, April, July, and October. To update this information, contact Latitude by Genesys Support.

Internal Processing

Latitude uses the full power of SQL to implement customized functions within the software. Your agency can use a proprietary process to enhance collection activities unique to your agency. For more information regarding your agency’s database, contact Latitude by Genesys Support.

Global Settings

Global settings are contained in an internal table that you cannot access within Latitude. To change attributes for a global setting, contact Latitude by Genesys Support.

Work Form Global Settings

Note Display Case Setting Global Setting

Account View – Show Notes in Upper Case: This option determines whether notes display in uppercase or mixed case. If this setting is 1, the notes display in uppercase. If this setting is 0, notes display in mixed case, which is the default setting.

Surcharge Calculation Global Settings

Promises – Control surcharge calculation mode: This setting determines whether users can choose the surcharge method when adding a PDC or Credit Card Payment.

Promises – Control surcharge calculation mode: This setting determines whether to deduct the surcharge from or add it to the calculated payment. If this setting is True (1), the system deducts the surcharge from the calculated payment. If this setting is False (0), the system adds the surcharge to the calculated payment.
Glossary

A

Account Mover: Latitude program that allows you to move accounts from one desk to another.

Account Scoring: Process of establishing the probability of collecting on an account.

Accounts Receivable: Money a customer owes for products and services provided on credit. A sale typically becomes an accounts receivable after the company invoices the customer.

ACH: Automated Clearing House. Secure payment transfer system used to send wire money transfers for debtor payments or customer invoices. These transactions are methods of billing the debtor’s bank account directly.

Action Code: Two-character code that identifies the work performed on an account. Action codes are attached to notes.

Administrative Wage Garnishment: See AWG.

Age-Based Fee: Accounts set up with age-based fee schedules accumulate collection fees based on an account date. The system increases or decreases at specific aging intervals the percentages charged for collections on accounts. For example, the system calculates a certain percentage of the amount collected for the first 30 days the organization holds the account, and another percentage for the 30-60 day period.

Amortization: Gradual paydown of the principal amount of a debt.

Automated Clearing House: See ACH.

AWG: Administrative Wage Garnishment. A tool that the Department of Education uses to recover defaulted student loans.

C

Consolidation: The process of combining one or more eligible student loans into a single loan for easy repayment.

Credit Bureau: Credit bureau (such as Equifax, Innovis, TransUnion, or Experian) that provides credit reports on debtors.

Custodian: Latitude program that allows you to build daily work queues, schedule letters, calculate interest, process promises, perform account calculations, clean invalid data, and process any other nightly tasks your organization requires.

Custom Groups: Custom groups allow you to group related customers together on Latitude reports. These groups are not the same as Parent Customers (invoice groups) or Customer Letter Groups. A customer can belong to more than one custom group.

DA: Decreasing Adjustment. Changes to an account that decrease the balance on the account. Latitude doesn't calculate fees against these amounts for your organization and doesn't reflect these amounts on invoices.
DAR: Decreasing Adjustment Reversal. Changes to an account that increase the balance on the account. Latitude doesn't calculate fees against these amounts for your organization and doesn't reflect these amounts on invoices. Also known as, Increasing Adjustment.

Decreasing Adjustment: See DA.

Decreasing Adjustment Reversal: See DAR.

Desk: Your organization can use desks or desk codes to group accounts for collection or other activity in Latitude. Your organization assigns users to the desk holding the accounts that you want users to work.

Desk Type: Desk type determines the type of accounts the desk holds. Your organization specifies the desk type when creating or modifying the desk. There are five types of desks: Administrator, Clerical, Collector, Inventory, and Supervisor.

Direct Check: Program used with Latitude to create paper drafts (or online checks) using debtor checking account information.

Dollar-Based Fees: Accounts set up with dollar-based fee schedules accumulate collection fees based on account balances. For example, Latitude calculates a certain percentage for accounts with a balance of $1,000.00, and another percentage for accounts with balances over $1,000.00 but not over $1,500.00.

DTEC: Report type that uses a Social Security Number to verify a person's identify or to locate a debtor.

Extra Data: Fields that your organization can create to capture custom data. Each segment of extra data that your organization creates has a unique code and can contain up to five separate fields. Extra Data is not the same as Miscellaneous Extra Data.

Gross Client: Customer who receives the full payment amount that your organization collects. The customer subtracts the collection fees and remits them to your organization.

Import Excel: Latitude program that allows you to import data from a Microsoft Excel® spreadsheet into a Latitude database.

Increasing Adjustments: See DAR.

Inventory Desk: Desk that holds accounts for distribution to users.

Invoice Group: Invoice groups contain two or more customers, one of which you designated as the parent customer, and the rest as child customers. You can associate a customer to one invoice group only. When you generate an invoice for a parent customer, the system includes all payments for the parent and child customers.
**Letter Console**: Latitude program that allows you to generate letters for accounts.

**LetterX**: Latitude program that allows you to bundle and export letter requests for an outside letter service to process. You can also use it to receive and update NCOA (National Change of Address) information in your Latitude database.

**M**

**Miscellaneous Extra Data**: Miscellaneous information that your organization can attach to an account. Generally, your organization receives this information from a debtor and imports it into Latitude. Miscellaneous Extra Data isn't the same as Extra Data.

**Money Bucket**: A category used to group dollar amounts associated to an account (for example, principal, interest, collection costs).

**N**

**Net Client**: Customer who receives a net amount of the payment amount that your organization collects. Your organization subtracts the collection fees and remits the remainder to the customer.

**NITD**: Notice of Intent to Deposit. Letter to notify the customer that your organization is depositing a post-dated check or paper draft.

**Notes**: Notes that you add to Latitude to track activity on an account, or that Latitude creates to record changes to data.

**Notice of Intent to Deposit**: See NITD.

**O**

**Online Checks**: See Paper Draft.

**P**

**PA**: Paid Agency. Payment to an outside collection agency that collects account money for your organization.

**Paid Client**: See PC.

**Paid Client Reversal**: See PCR.

**Paid in Full**: See PIF.

**Paid Us**: See PU.

**Paid Us Reversal**: See PUR.

**Paper Draft**: Transactions that create payment checks using bank account information. Your organization prints checks using Direct Check software and deposits them into your organization's or the customer's trust account.

**PAR**: Paid Agency Reversal. Reversal of a payment to an outside collection agency that collects account money for your organization where the check did not clear.
Particulars of Debt: See POD.

Payment: See PA.

Payment Reversal: See PAR.

PC: Paid Client. Payment that the debtor sends to your organization for an account that an outside collection agency or attorney holds. The outside collection agency or attorney receives a fee for the payment.

PCR: Paid Client Reversal. Reversal of a payment that the debtor sent to your organization for an account that an outside collection agency or attorney holds where the check didn't clear.

Phone Number Format: Latitude does not format phone numbers, and allows any character. We recommend that your organization set guidelines for entering phone numbers to ensure consistency when searching and reporting on accounts.

Phonetic Name Search: Search that uses an algorithm to break a name into a phonetic key based on the consonants. Phonetic matching is useful when a user doesn't know the exact spelling or it varies. For example, searching on "John" finds the name "Jon." Keep in mind that the system doesn't match partial phonetic keys. For example, searching "John" does not find "Johnny."

PIF: Paid in Full. The customer considers the debt as paid in full.

POD: Particulars of Debt. Accounts that contain one or more invoices indicating debt segments of principle balances within each debtor account.

Preset: Saved group of settings within the Account Mover window, used to select which accounts to move and specify which desks are to receive the accounts.

PU: Paid Us. Payment that the debtor sends to your organization. If an outside collection agency or attorney holds the account, the agency or attorney receives a fee for the payment.

PUR: Paid Us Reversal. Reversal of a payment that the debtor sent to your organization where the check didn't clear. If an outside collection agency or attorney holds the account, the agency or attorney refunds the fee received for the payment.

Queue: Group of accounts that a specific desk works.

Queue Level: Three-digit numeric code assigned to an account to represent its status within the queue.

Rehabilitation: Process of bringing a loan out of default and removing the default notation on a debtor's credit report.

Responsible Party: Person with a legal obligation to pay on an account. Latitude allows your organization to associate multiple responsible parties to an account and specify demographic information for each party.

Result Code: Two-character code assigned to notes to classify activity on an account. Your organization can customize standard result codes. Latitude uses result codes to track the number of accounts each collector worked and contacted.
Role: Roles define the security levels for each type of user. Your organization must assign a role to each Latitude user.

S

Settled in Full: See SIF.

SIF: Settled in Full. An account balance that your organization settled for less than the amount owed.

Social Security Number Format: Latitude does not format the Social Security Number (SSN), and allows any character. Typically, we recommend that you don't format SSNs. We recommend that your organization set guidelines for entering SSNs to ensure consistency when searching and reporting on accounts.

Status Code: Three-character code that indicates the state of an account and whether it is active or closed.

Surcharge: Amount charged in addition to the calculated arrangement amount. The surcharge doesn't affect the net applied amount or further projection of the account balance.

System Month Warning: Message that Latitude displays when opening the Payment Entry window and the current Latitude system month is not consistent with the payment date. Set the current system month in Latitude at the start of your organization's invoice cycle.

T

Title IV Loan Program: Programs that provide grants, loans, and work-study funds from the federal government to eligible students enrolled in college or career school.

Tokenization: The process of substituting tokens for actual data when exchanging sensitive data with vendors.

Tokens: Symbolic representations of account data that Latitude stores in the database in place of the actual data.

Trust Account: Bank account that your organization uses to retain deposits received directly from debtors, or deposits that customers received from debtors and then forwarded to your organization. You can associate a trust account to one or more customers.

U

User: Code that identifies a person using Latitude.

W

Wallet: Allows users to add a reusable payment instrument (credit card, ACH, or paper draft) for a debtor and use it for immediate or future payment transactions. Latitude associates the payment instrument to the debtor, not the account.

Work Form: Main window in Latitude that is the primary source of account information. Most of the key information required when working an account is available in the Work Form.