



Latitude® Release Notes

Version 10.0

Last updated April 20, 2020

Abstract

This document summarizes new features in Latitude and its related products and components.

For copyright and trademark information, see
https://help.genesys.com/latitude/10/Desktop/Copyright_and_Trademark_Information.htm.

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Introduction to Release Notes

The Release Notes include all new features and visible changes introduced in each Service Update (SU) of Latitude 10.0 and its related products and components. Each SU includes a system-generated New Features and Summary file that provides a detailed list of public changes in the release. These files are available in the Latitude Documentation Library at https://help.genesys.com/latitude/10/desktop/service_updates.htm.

Product Notices

Following are notifications about changes in sales and support status for Latitude 10.0 products, or third-party products.

Latitude End of Life

Added April 20, 2020

Genesys provides software updates for 18 months from the date of the release of the product version. With the release of Latitude 10.0 SU 9 in February 2019, SU7 and earlier releases have reached beyond their standard support expiration date. Genesys recommends that current Latitude 10.0 customers update to the latest Latitude 10.0 Service Release.

New Features in 10.0 SU 9

New Features in 10.0 SU 9

The following products or components include new features in 10.0 SU 9:

- [Account Analysis Conditions](#)
- [Custodian](#)
- [Installation and Configuration](#)
- [Latitude](#)
- [Letter Console](#)
- [Web Access](#)

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*.

Account Analysis Conditions

The Account Analysis query tool in 10.0 SU 9 includes the new "Needs Review" condition to allow querying accounts with arrangements that have active payments that need reviewed.

Custodian

Custodian 10.0 SU 9 includes the following changes:

- Added "Evaluate Arrangements" task, which evaluates payment arrangements as follows:
 - If a non-linked account is in queue level 998 or 999, the stored procedure places the account's PCCs, PDCs, and promises on hold.
 - If an account has pending post-dated credit cards or checks, the stored procedure updates the queue level and status accordingly.
- Removed the following tasks and moved the functionality to the new "Evaluate Arrangements" task:
 - Set Inactive Closed Credit Cards
 - Set Inactive Closed Post Dated Checks
 - Set Inactive Closed Promises
 - Review PCCs
 - Review PDCs

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.

Installation and Configuration

Installation and configuration for Latitude 10.0 SU 9 includes the following new features:

- Updated PVGConverter tool to include creation of wallet records.
- If you upgrade from a Latitude version earlier than SU 9 to SU 9 or later, there is 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*.

Invoices

Invoices 10.0 SU 9 added preview, export and print invoice options to the **Invoice Options** dialog box for a specific or group of customers.

Latitude

Latitude 10.0 SU 9 includes the following new features and changes.

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.

Interest

Added the **Interest Accrual Tracking** panel for viewing accrued interest for an account.

Letters

- Added ability to modify pending letters using Microsoft Word to the **Account Letters** window. You can use this feature if your organization enabled the **Merge Using Microsoft Word** permission and you have Microsoft Word installed.
- Changed the format for saving letter images from RTF to PDF to save space.

Payment arrangements

- Added ability to change the check number for an active ACH payment in an arrangement in the **Change Wallet Item** dialog box.
- Added ability to change the payment instrument for multiple payments in the **Arrangements** panel.
- Added ability to select a payment instrument from the wallet on the **Select Payment Type** page in the **Enter New Arrangements** window.
- Added ability to view payment arrangements for linked accounts in the **Arrangements** panel.
- Added ability to add a payment to an arrangement in the **Payment Arrangement Wizard**.
- Added ability to renegotiate a payment arrangement in the **Payment Arrangement Wizard**.
- 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.
- 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 how your organization set the **Process Real-time Credit Card Transactions** permission.
- 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.
- Removed ability to add the remaining amount due (deficit) as a trailing payment from the **Review Payment Arrangement** page when tweaking an arrangement. Instead, Latitude adjusts the last payment amount accordingly.

Payment instruments

- Changed the process for adding payment instruments to the wallet in the **Add Payment Instrument** dialog box.
- 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.
- Added ability to delete a payment instrument in the **Wallet Maintenance** dialog box.
- Added ability to change the address for a payment instrument in the **Payment Instrument Contact** dialog box.

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."

Status codes

Added status code **ILA - Incomplete Link Arrangement** for linked arrangements that don't contain all the linked accounts.

System codes

Added **Letter Type** dialog box for maintaining user-defined letter types for Letter Console.

Letter Console

Letter Console 10.0 SU 9 includes the following changes:

- Renamed the **Download for Editing** button to **Download** on the **Letter Pool** tab.
- Renamed the **Upload Edited Template** button to **Upload** on the **Letter Pool** tab.
- When downloading or uploading letters, the file type defaults to ".doc" and both default to the same folder.
- Added letter code to the default file names for downloaded letters. Previously, the default file name only included the letter ID.
- Added an **Edit** button to the **Letter Pool** tab. This button is only available if your organization enabled the **Merge Using Microsoft Word** permission in Latitude. Latitude by Genesys added this button to restore the ability to open letter templates directly in Microsoft Word without having to use the download and upload feature. For more information about the new permission, see the Latitude documentation.
- When clicking the **Download Merge Fields** button on the **Letter Pool** tab, the output file name defaults to "MergeFields.[Letter Console Version].doc".
- Changed the bank account address fields to populate with the wallet contact information for NITD letters.

Web Access

Web Access 10.0 SU 9 includes an Agency Details section on the **Account** page for accounts placed with an outside collection agency or attorney.

New Features in 10.0 SU 8

New Features in 10.0 SU 8

The following products or components include new features in 10.0 SU 8:

- [AIM](#)
- [AIM Receiver Manager](#)
- [Latitude](#)

AIM

AIM 10.0 SU 8 includes the following new features for complaints and disputes:

Complaints

- Added **Send Complaint Information** check box to the **Exporting** tab in the **Options** window for including complaint records in the placement file that AIM sends to outside collection agencies and attorneys.
- Added **Do Not Recall Accounts Receiving Complaints** check box to the **General** tab in the **Agencies/Attorneys** pane for specifying whether the outside collection agency or attorney works accounts that have complaints. If they do work accounts that have complaints, AIM sends the accounts to the agency or attorney. If they don't work accounts that have complaints, AIM recalls the accounts from the agency or attorney automatically.
- Added "Complaints Export File" layout for exporting complaint records.
- Added "Placement Export File Complaints Record" layout for placing accounts that have complaint records with outside collection agencies or attorneys.
- Added "Complaints Import File" layout for importing complaint records received from outside collection agencies and attorneys holding the accounts.

Disputes

- Added **Send Dispute Information** check box to the **Exporting** tab in the **Options** window for including dispute records in the placement file that AIM sends to outside collection agencies and attorneys.
- Added **Do Not Recall Accounts Receiving Disputes** check box to the **General** tab in the **Agencies/Attorneys** pane for specifying whether the outside collection agency or attorney works accounts in dispute. If they do work accounts in dispute, AIM sends the accounts to the agency or attorney. If they don't work accounts in dispute, AIM recalls the accounts from the agency or attorney automatically.
- Added "Disputes Export File" layout for exporting dispute records.
- Added "Placement Export File Disputes Record" layout for placing accounts that have dispute records with outside collection agencies or attorneys.
- Added "Disputes Import File" layout for importing dispute records received from outside collection agencies and attorneys holding the accounts.

AIM Receiver Manager

AIM Receiver Manager 10.0 SU 8 includes the following new features:

Complaints

- Added **Complaint (CCPT)** option to the **Process** tab in the **Client Configuration** window for importing complaints.

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- Added **Complaint (ACPT)** option to the **Process** tab in the **Client Configuration** window for exporting complaints.

Disputes

- Added **Dispute (CDIS)** option to the **Process** tab in the **Client Configuration** window for importing disputes.
- Added **Dispute (ADIS)** option to the **Process** tab in the **Client Configuration** window for exporting disputes.

Latitude

Latitude 10.0 SU 8 includes new features for payment arrangements and permissions.

Payment arrangements

- Added **Change Wallet Item** dialog box for:
 - Changing the payment instrument on a single payment or all payments in an arrangement.
 - Assigning multiple payment instruments to a payment arrangement.
 - Adding a credit card wallet item and assigning it to a single payment or all payments in an arrangement.
 - 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.
- 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 weekday to use to establish payment due dates.
- 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.
- Removed the "Account has a settlement agreement" message from the **Arrangements** panel when an account has a settlement arrangement that is no longer active.

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.

New Features in 10.0 SU 7

New Features in 10.0 SU 7

The following products or components include new features in 10.0 SU 7:

- [Account Analysis Conditions](#)
- [Credit Bureau Reporting Wizard](#)
- [Installation and Configuration](#)
- [Latitude](#)
- [System Requirements](#)

Account Analysis Conditions

The Account Analysis query tool in Latitude 10.0 SU 7 includes the following new conditions for querying accounts based on credit reporting criteria:

- Added "cbrDataPaidByInsurance" condition to allow querying medical accounts that insurance paid.
- Added "cbrDataPendingExceptionDtlv" condition to allow querying accounts based on credit reporting exceptions.

Credit Bureau Reporting Wizard

Credit Bureau Reporting Wizard 10.0 SU 7 includes the following new exceptions for reporting accounts to the credit bureaus:

- Added "InvalidDOB" exception. If an authorized account user's date of birth is missing or a responsible party's SSN and date of birth are both missing, the account doesn't report to the credit bureaus.
- Added "InvalidOriginalLoanAmount" exception. If the original loan amount is missing, the account doesn't report to the credit bureaus.
- Added "MedicalWithin180Days" exception. If an account has a medical creditor classification and is less than 180 days past the delinquency date, the account doesn't report to the credit bureaus.

Installation and Configuration

Installation and configuration for Latitude 10.0 SU 7 includes the following new features:

- Added recommendation to set the compatibility level for SQL Server 2014 to 120.
- Added support for SQL Server 2014.

Latitude

Latitude 10.0 SU 7 includes new features for credit bureau reporting, payment arrangements, and permissions.

Credit Bureau reporting

- Changed **CB Detail** panel to display information on tabs instead of separate windows.
- 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 Arrangements** page in the **Enter New Arrangements** window.

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.

System Requirements

System requirements for Latitude 10.0 SU 7 includes support for SQL Server 2014.

New Features in 10.0 SU 6

New Features in 10.0 SU 6

The following products or components include new features in 10.0 SU 6:

- [Account Analysis Conditions](#)
- [Credit Bureau Reporting Console](#)
- [Latitude](#)
- [Letter Console](#)
- [WorkFlow Designer](#)

Account Analysis Conditions

The Account Analysis query tool in Latitude 10.0 SU 6 includes the following new conditions for querying accounts:

- Added "Care and Hardship" condition to allow querying accounts based on care and financial hardship criteria.
- Added "Complaint" condition to allow querying accounts based on complaint criteria.
- Added "Dispute" condition to allow querying accounts based on dispute criteria.
- Added "Income and Expenditure" condition to allow querying accounts based on debtor income and expenditure criteria.

Credit Bureau Reporting Console

Credit Bureau Reporting Console 10.0 SU 6 includes a change to the optional credit bureau reporting compliance condition code "XB" from one-time reporting to reporting for as long as the code is valid.

Latitude

Latitude 10.0 SU 6 includes new features for care and hardship; complaints; compliance condition codes; custom data; disputes; income and expenditures; and permissions.

Care and hardship

Added **Care and Hardship** panel for maintaining care and financial hardship cases for accounts.

Complaints

Added **Complaints** panel for maintaining complaints for accounts.

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.

Custom data

Added **Custom Data** panel for adding and modifying user-defined list codes, and associating data to the list codes.

Disputes

Added **Disputes** panel for maintaining disputes for accounts.

Income and expenditures

Added **Income and Expenditures** panel for maintaining income and expenditure information.

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.

Letter Console

Letter Console 10.0 SU 6 includes the ability to download letter templates in ".docx" format on the **Letter Pool** tab.

WorkFlow Designer

WorkFlow Designer 10.0 SU 6 includes the following new system events:

- Added "Care and Hardship Closed" system event, which triggers when a user changes the status of a care or hardship record to "closed."
- Added "Care and Hardship Entered" system event, which triggers when a user adds a care or hardship record.
- Added "Care and Hardship Updated" system event, which triggers when a user updates a care or hardship record.
- Added "Complaint Closed" system event, which triggers when a user changes the status of a complaint record to "closed."
- Added "Complaint Entered" system event, which triggers when a user adds a complaint record.
- Added "Complaint Updated" system event, which triggers when a user updates a complaint record.
- Added "Dispute Closed" system event, which triggers when a user changes the status of a dispute record to "closed."
- Added "Dispute Entered" system event, which triggers when a user adds a dispute record.
- Added "Dispute Updated" system event, which triggers when a user updates a dispute record.
- Added "Income and Expenses Updated" system event, which triggers when a user updates an income or expense record.

New Features in 10.0 SU 5

New Features in 10.0 SU 5

The following products or components include new features in 10.0 SU 5:

- [Credit Bureau Reporting Console](#)
- [Custodian](#)
- [Invoices](#)
- [Latitude](#)

Credit Bureau Reporting Console

Credit Bureau Reporting Console 10.0 SU 5 includes an update to the **Minimum Balance** definition in the **Customer Configuration** pane to indicate that the amount the system compares the threshold to is based on whether the **Report principal only** check box is selected.

Custodian

Custodian 10.0 SU 5 includes the following new tasks:

- Added "Debtor Credit Bureau Compile" task, which issues a recompile before calling the bulk Credit Bureau Reporting evaluation process to improve performance.

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- Added "Debtor Credit Bureau Compile2" task, which issues a recompile after calling the bulk Credit Bureau Reporting evaluation process to improve performance.
- Added "Debtor Credit Bureau Reset CbrPrevent" task, which resets the flag for evaluating disputed accounts.
- Added "Debtor Credit Bureau Force Disputes by Status" task, which evaluates disputed accounts to determine whether to include or exclude them in reports to the credit bureaus.
- Added "Debtor Credit Bureau ForceDeletes by Status" task, which sets the special note for accounts with a closed status that never reported previously so that the system doesn't include the accounts in reports to the credit bureaus.

Invoices

Invoices 10.0 SU 5 includes the ability to apply payments to the oldest accounts receivable balance first using the new **Apply to Oldest First** check box in the **Options** dialog box.

Latitude

Latitude 10.0 SU 5 includes new features for credit bureau reporting, projected fees, and permissions.

Credit Bureau reporting

Changed message from "Scheduled to report" to "Will evaluate on" on the **CB Detail** panel.

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.

New Features in 10.0 SU 4

New Features in 10.0 SU 4

The following products or components include new features in 10.0 SU 4:

- [AIM](#)
- [Credit Bureau Reporting Console](#)
- [Credit Bureau Reporting Wizard](#)
- [Custodian](#)
- [Installation and Configuration](#)
- [Latitude](#)

AIM

AIM 10.0 SU 4 includes the following new features:

- Added **FTP Passive Mode** check box to set the FTP passive mode at the program level and **Passive Mode** check box to set the FTP passive mode at the agency level. These check boxes are on the **General** tab in the **Options** window.
- Added **Adjust Field Lengths for Delimited Files (string fields only)** check box to ensure that string fields in delimited export files don't exceed the specified length in the layout. This check box is on the **Defaults** tab in the **Options** window.
- Changed the Filler length in the Assets File Trailer Record from 307 to 316 for import and export files.

Credit Bureau Reporting Console

Credit Bureau Reporting Console 10.0 SU 4 includes new configuration settings.

Customer configuration

- Changed **Enabled** check box label to **Reporting Enabled** for clarity on the **Customer Configuration** pane.
- Removed **Always Use Customer Credit Bureau Settings, if assigned** check box from the **Customer Configuration** pane.

Setup configuration

- Added **Allow deletion of accounts that were reported as paid-in-full previously** check box to the **Setup Configuration** pane.
- Changed **Enabled** check box label to **Reporting Enabled** for clarity on the **Setup Configuration** pane.

Status configuration

Removed "Bankruptcy" and "Deceased" columns from the **Status Configuration** pane.

Credit Bureau Reporting Wizard

Credit Bureau Reporting Wizard 10.0 SU 4 includes the following new features:

- Added J1 segment to Metro2 file to accommodate the requirements of the Equal Credit Opportunity Act when reporting to the credit bureaus.
- Added **Create test file** check box to the **Output Options** page to allow creation of a credit bureau reporting test file for review purposes only, not for sending to the credit bureaus.

Custodian

Custodian .0 SU 4 includes the following new tasks:

- Added "Evaluate Promises" task, which evaluates kept or broken promises and updates the account queue level and status accordingly.

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- Added "Review PCCs" task, which evaluates pending post-dated credit card payments and updates the account queue level and status accordingly.
- Added "Review PDCs" task, which evaluates pending post-dated check payments and updates the account queue level and status accordingly.

Installation and Configuration

Installation and configuration for Latitude 10.0 SU 4 includes the following new features:

- Added configuration to allow batched transactions in AIM.
- Added configuration for FTP and SFTP in AIM.
- Added configuration for SMTP and SFTP in Letter Writer.
- Added ability to replace SSNs that have blank values in letters.

Latitude

Latitude 10.0 SU 4 includes new features for credit bureau reporting, fee schedules, payment processing, permissions, and system codes.

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** dialog box 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.

Payment processing

Added ability to adjust payments on a POD account in the **Payment Entry** window.

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.

New Features in 10.0 SU 3

New Features in 10.0 SU 3

The following products or components include new features in 10.0 SU 3:

- [Installation and Configuration](#)
- [Latitude](#)
- [System Requirements](#)
- [Web Access](#)

Installation and Configuration

Installation and configuration for Latitude 10.0 SU 3 includes the following new features:

- Added Dashboard install, which provides a customized view into the collections data of a Latitude user.
- Added Service Request Gateway install, which securely handles connections between your agency and a service vendor, such as a credit reporting vendor.
- Added TUNA Wizard install, which allows requesting credit bureau reports from TransUnion.
- Updated the Payment Vendor Gateway configuration to allow setting the Application Pool Identity.

Latitude

Latitude 10.0 SU 3 includes new features for account linking, Payment Vendor Gateway, and payments.

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.

Payments

- Added **Judgment Date** and **Case Number** to the **Payment Entry** window for accounts that have these values.
- 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.
- 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.

System Requirements

System requirements for Latitude 10.0 SU 3 includes the following new features and changes:

- Added support for Windows Server 2008 R2 and 2012.
- Added support for SQL Server 2008 R2 and 2012.
- Added support for Windows 7 and Windows 8.
- Removed support for Windows Server 2003.
- Removed support for SQL Server 2005.

Web Access

Web Access 10.0 SU 3 includes the following new features for reports:

- Updated the Account Status report to include a link to view account details.
- Added a "where" clause requirement for new reports. To ensure the report runs correctly, specify "where 1=1" in the report writer. If the report doesn't include a where clause, the report returns every record because the report writer doesn't add a customer or Class of Business "where" clause unless a "where" clause is present already.

New Features in 10.0 SU 2

New Features in 10.0 SU 2

The following products or components include new features in 10.0 SU 2:

- [Credit Bureau Reporting Wizard](#)
- [Installation and Configuration](#)
- [Latitude](#)
- [System Requirements](#)
- [Web Access](#)

Credit Bureau Reporting Wizard

Credit Bureau Reporting Wizard 10.0 SU 2 includes the K2 segment (which reports the name of the company that sold or purchased the account) in the report to the credit bureaus.

Installation and Configuration

Installation and configuration for Latitude 10.0 SU 2 includes the following new features:

- Added support for ADMX group policy for configuring database connectivity.
- Added PVGConverter.exe install to allow tokenization of existing credit card and post-dated check (PDC) account data.

Latitude

Latitude 10.0 SU 2 includes new features for payment arrangements, credit bureau reporting, desk assignments, fee schedules, first-party charge-offs, promise notes, and Service Request Gateway.

Payment arrangements

Added the ability to modify a payment due date or amount in the **Enter New Arrangements** window.

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.

Fee schedules

- Increased the number of allowable fee schedule ranges from 5 to 10 in the **Fee Schedules** dialog box.
- Added **Payment Amount** and **Batch Balance Placed** fee schedule types in the **Create New Fee Schedule** dialog box.

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.

Service Request Gateway

Added Service Request Gateway functionality 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.

System Requirements

System requirements for Latitude 10.0 SU 2 includes the hardware and software requirements for virtualized servers.

Web Access

Web Access 10.0 SU 2 includes the removal of the default "upload" and "download" folders when transferring files.

New Features in 10.0 SU 1

New Features in 10.0 SU 1

[Latitude](#) includes new features in 10.0 SU 1.

Latitude

Latitude 10.0 SU 1 includes new features for Payment Vendor Gateway and 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.