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Latitude[®] by Genesys

Printable Help for Administrators

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Abstract

This document is a printable version of Latitude by Genesys help for administrators.

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Introduction to Latitude

The Latitude collections solution has comprehensive debt collection and recovery capabilities for managing all pre- and post-charge-off accounts and workflow processes. It provides collectors and agents with the tools to manage the debt collection and recovery process. It also provides supervisors, managers, administrators, and support staff with the tools to manage Latitude.

Latitude provides the full functionality for the collector's or agent's desktop and deploys as a true zero-footprint, browser-based environment.

Latitude allows you to:

- Maintain account and contact information.
- Track account activities.
- Record account notes.
- Set account reminders and follow-up dates.
- Schedule and process payments.

What's New in Latitude

For more information about the changes and enhancements in Latitude, see the following:

2020 R1

2020 R1 introduced the following changes and enhancements in Latitude.

Permissions

- Added <u>Allow RDN Case Creation and Updates permission</u> for specifying whether users can create and update RDN collateral recovery cases on the **RDN Integration** panel.
- Added <u>Allow Collateral Editing Permission</u> for specifying whether users can modify automotive and non-automotive collateral information on the **Collateral** panel.
- Added Manual Dial Policy to <u>Dialer Permission</u> to allow users to place calls manually through the Genesys Cloud client. (For Genesys Cloud integrations only.)
- Added <u>Phone Type Mapping Permission</u> for mapping phone types to action codes.
- Added <u>RDN Service Configuration</u> for specifying the URL and API key for retrieving RDN collateral recovery case updates.

Genesys Cloud integration

Added ability to integrate Latitude with Genesys Cloud[™] for Dialer capabilities that allow collectors to process campaign calls based on call lists that your organization creates using List Builder. For more information, see Latitude Integration with Genesys Cloud.

Reference panels

• Added ability to maintain automotive and non-automotive collateral information for an account. For more information, see Collateral.

Note: This panel replaces the Automotive panel.

• Added ability to open a web page inside a custom reference panel and display mapped content within the web page. For more information, see <u>Add a Custom Anchor Card or Reference Panel</u>.

System codes and settings

- Added ability to specify a user's credentials for a third-party system to log on the user to the third-party system automatically. For more information, see <u>Add a User</u> and <u>Modify a User</u>.
- Added user-defined list codes for the following:
 - o Bankruptcy Reaffirm Method
 - o Bankruptcy Status
 - o Bankruptcy Surrender Method
 - o Prefix
 - o Suffix

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For more information, see List Codes.

Task panels

Added ability to create and update RDN collateral recovery cases. For more information, see RDN Integration.

2020 R2

2020 R2 introduced the following changes and enhancements in Latitude.

Account Analysis

Added ability to create queries to retrieve accounts that meet specific criteria. Also, allows you to sort, group, and summarize the information for review. For more information about account analysis, see <u>Account Analysis</u>.

Permissions

- Added Access Account Analysis Permission for specifying whether users can create and update Account Analysis Query.
- Added <u>User Restrictions by Conditions Permission</u> to restrict the accounts that the user can modify using Account Analysis.

Account Reactivation

Added ability to reinstate an account and unreturn an account. For more information about reinstate and unreturn, see Reinstate an Account and Unreturn an Account.

Permissions

- Added Access Reopen Account Permission for reinstate an account.
- Added Access Unreturn Account Permission for unreturn an account.
- Added Email Request Permission for email a letter.
- Added Print Request Permission for print a letter.
- Added <u>SMTP Permission</u> for email messages.
- Added Bankruptcy Permission for modify or delete bankruptcy data.
- Added Deceased Permission for modify or delete deceased data.
- Added My Desk Assignment Permission for reassign an account to desk.

Task panels

- Added ability to email a letter. For more information, see Email a Letter.
- Added ability to print a letter. For more information, see Print a Letter.

Log On to Latitude

Use the **Logon** page to log on to Latitude. Your assigned permissions determine which options and features in Latitude are available to you. For more information, see <u>Permissions and Policies</u>.

To log on to Latitude

1. Open Latitude in your browser. The Latitude by Genesys Logon page appears.

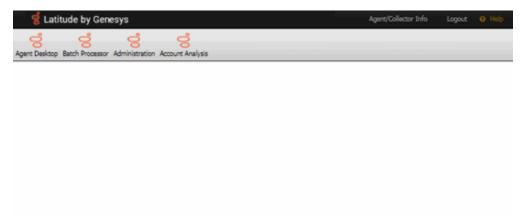
Latitude	Username
by	Password Change Password
Genesys 🥥	Kicon

- 2. Do one of the following:
 - If you have a user ID and password specifically for Latitude, type them in the boxes and then click **Log On**.

Note: As you type your password, periods display instead of the typed characters. If your password expires, the system requires you to change it. For more information, see Change Your Password.

If your organization configured Latitude to allow an external logon (for example, your network credentials), leave the Username and Password boxes blank and click External Log On. If you aren't logged on externally, the system redirects you to your identity provider and prompts you to provide your credentials.

If your credentials are correct, the **Latitude by Genesys** page appears. Otherwise, an error message appears; provide the correct credentials or contact your system administrator for assistance.



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3. To view information about the system (such as assembly versions for each component on the web server), click the version number in the status bar. The **About Interaction Collector** dialog box appears. This information is useful for troubleshooting deployments.

About Interaction Co	llector	
DB Server Name	MaltLavaSys	lest
Database Name	Collect2000	
Assembly Versions		
Name		Version
ace-w64r-3-0		3.0.5.4
AutoMapper		2.2.1.0
Castle.Core		3.2.2.30
core_events-w64r-3-0		3.0.10.8
EntityFramework		6.1.30225.0
EntityFramework.SqlServer		6.1.30225.0
i3core-w64r-3-0		3.0.10.8
i3eventlog-w64r-3-0		3.0.10.8

- 4. Do one of the following:
 - To view or work an account, click **Agent Desktop**. A new browser tab opens. If any account interactions remained open when you last logged off, the **Open Interactions** panel appears. Otherwise, the **Search Accounts** panel appears. For more information, see Account Retrieval.
 - To process a batch of payment transactions (provided you have the appropriate permissions), click **Batch Processor**. For more information, see Process a Payment Batch.
 - To configure system codes, settings, permissions, and policies (provided you have the appropriate permissions), click Administration. For more information, see <u>System</u> <u>Administration</u>.

Change Your Password

Use the **Change Password** dialog box to change your Latitude password. If your password is close to the expiration date (based on the Password Expiration permission setting), a warning appears under the **Change Password** link.

To change your password

1. Open Latitude in your browser. The Latitude by Genesys Logon page appears.

Latitude	Username
bv	Password
	Change Password
Genesys 🥥	- Cogu

2. Click Change Password. The Change Password dialog box appears.

Change Password

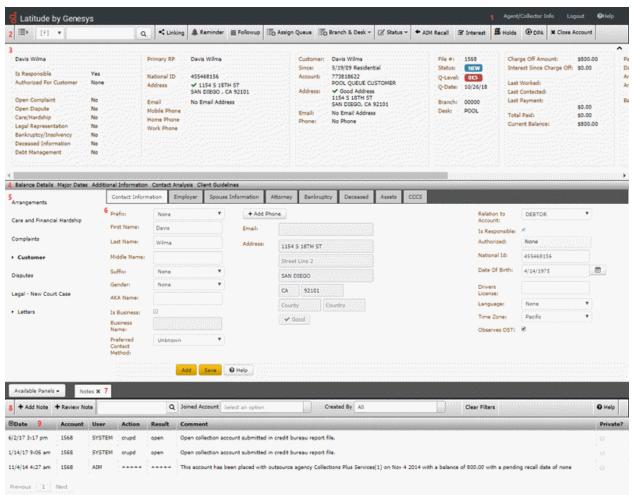
Login Name	Login Name	
Current Password	Current Password	
New Password	New Password	
Confirm New Password	Confirm New Password	
Char	nge Password Cancel	Password Hint Password Hint

- 3. In the Login Name box, type your user ID.
- 4. In the **Current Password** box, type your current password.
- 5. In the **New Password** box, type your new password.
- Tip: To view the requirements for creating a password, click Password Hint.
- 6. In the **Confirm Password** box, retype your new password.
- 7. Click Change Password.

I

Work Form Overview

The **Work Form** is the main page in Latitude, and it consists of several sections. Each section allows you to perform specific actions related to that section.



10 DB Server Name: Jocalhost Database: Collect2000 Previous Login: Oct 26, 2018 1:29:38 pm Time on Account: 00:04:40

Note: A red asterisk (*) next to a field indicates a required field.

- 1. **Application toolbar:** Displays options for viewing the **Welcome** page, logging off Latitude and viewing the documentation. When processing a request, a yellow progress bar appears along the top edge of this toolbar and a circulating progress indicator appears next to the logo.
- 2. Account toolbar: Displays options for displaying and working an account.
- 3. **Delinquency** or **Recovery anchor:** Displays delinquency or recovery information for the selected account, depending on how your organization configured your system.
- 4. Account Detail toolbar: Displays options for viewing detail and summary information for the selected account.
- 5. Task Panel navigation tree: Displays the available task panels and allows you to open them.
- 6. Task panel: Displays the selected task panel.

- 7. Reference Panel navigation bar: Allows you to open and close reference panels.
- 8. **Reference Panel toolbar:** Displays options for the selected reference panel.
- 9. Reference panel: Displays the selected reference panel.
- 10. Status bar: Displays the following system and account status information:
 - **DB Server Name:** Name of the Latitude database server.
 - Database: Name of the Latitude database.
 - **Previous Login:** Date and time you last logged on to Latitude.
 - **Time on Account:** Length of time that you've spent on this account. If the background color is gray, you haven't reached the threshold set for the **caution** or **warning** zones. If the background color is yellow, you've reached the threshold set for the **caution** zone. If the background color is red, you've reached the threshold set for the **warning** zone. For more information, see the <u>Time on Account Configuration permission</u>.
 - **Queue Progress:** Number of accounts in the work queue. This value only appears when you are working accounts in a queue.
 - Alerts: Number of issues related to the account. To view details about the alert, click Alerts. If you receive this message, "An error has occurred. If this problem persists, please contact Technical Support," you can view the details by clicking Alerts.

Icons

An icon allows you to perform a specific action. The following icons are available on the Work Form:

lcon	Name	Description
i≣ >	Search Slide-in	Displays and hides the Search & Queue Selection panel, which allows you to search for and display accounts. The Search slide-in is on the Account toolbar.
^	Collapse	Collapses a section of the Work Form to hide its contents.
v	Expand	Expands a section of the Work Form to display its contents.
T	Filter	Limits information in a data grid based on criteria you specify.

Form state

When you attempt to save information, the background of the "save" section of the panel you are working changes color to indicate the status of the attempted save.

Color	Description
Gray	Default color that indicates the user hasn't requested a "save" action yet.
Blue	Indicates the "save" action is processing.

Green	Indicates the "save" action completed without errors.
Red	Indicates that there was an error completing the "save" action.

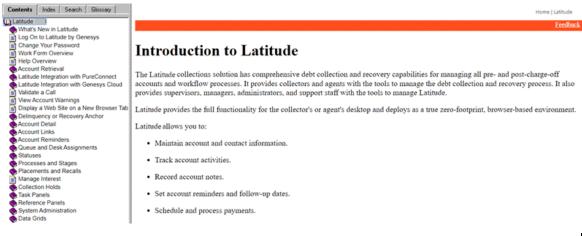
Help Overview

Latitude help provides you with information for using Latitude. You can locate and view help topics using the table of contents, index, and search features. You can also open help within certain areas of Latitude (for example, panels and dialog boxes) to view context-appropriate information.

To open Latitude help

• In the **Application** toolbar, click **Help**. The help opens with the introductory topic and table of contents displayed.

Note: To open the help to a context-appropriate topic, in the panel or dialog box you have open currently, click **Help**. The corresponding topic appears in a separate window. To display the table of contents, at the bottom of the help window, click **Show**.



Tip: To adjust the width and height of the window or its panes, click the edge of the window or pane and drag it up or down, left or right.

- 1. **Toolbar:** Allows you to display the table of contents, index, search feature, or glossary. When you click an option in the toolbar, the corresponding information appears in the **Navigation** pane.
- 2. Navigation pane: 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 <u>search feature</u>. 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 for sending feedback through an email message to Latitude by Genesys Documentation.

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5. **Content pane:** Displays the contents of a topic. To display recently visited topics, use your browser's **Back** and **Forward** options. To view the **Content** pane menu, right-click in the **Content** pane.

Search feature

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

Search syntax

The basic rules for formulating search queries are:

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

Wildcard expressions

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

Search for	Example	Result
Topics with text that starts with one or more specified characters and ends in any character or number of characters	log or log*	Returns all topics with text that starts with the specified characters (for example, log, logon, logging).
Topics with text that starts with the specified characters, has a single character that can be anything, and ends in the specified characters	32?57	Returns all topics with text that has any character where you placed the question mark (for example, 32?57 returns 32257, 32457, and 32857).
specified, in any order or placement	account status	Returns all topics with both account and status, but not necessarily as a phrase or in the order specified. For example, the search returns topics with "the account status" or "the status of the account"

	account status"	Returns all topics with account status as a phrase. For example, the search returns topics with "the account status" but not "the status of the account"
--	--------------------	--

Boolean operators

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

Search for	Example	Result
AND	account AND	Returns all topics with both account and status, but not necessarily as a phrase or in the order specified. For example, the search returns topics with "the account status" or "the status of the account"
OR	account OR status	Returns all topics with either account or status, or both.
NOT	account NOT status	Returns all topics with account but not status.
NEAR	account NEAR status	Returns all topics where account is within eight words of status.

Nested expressions

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

Screen captures

Many topics contain a snapshot of the related application page. Use this sample graphic as a frame of reference to match the application page to the help topic. What you see displayed in the application may differ, depending on your system configuration, your permissions, and the options you select.

Account Analysis

Account Analysis

You can use the **Account Analysis** tool to create queries to retrieve accounts that meet specific criteria. You can sort, group, and summarize the information for review.

For more information about each account analysis condition, see the <u>Account Analysis Conditions</u> <u>Technical Reference</u>.

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.

To open the Account Analysis page

On the Welcome page, click Account Analysis. The Account Analysis page appears.

Account Query Results 1		
Clear Clear	Σ Count P Run 2	0
Accounts Address Address_Confirmation Address_Confirmation A3M AWG AWG AWG New CareAndHardship Collateral Consolidation Consolidation New Court Debt Forwarding Debt Forwarding DebtorDanign DebtorCreditCards Debtors Delinquency Dialers Dispute Dispute Documentation	3 Conder a second s	-
Documentation Early Stage Data Events Financial Interactions	✓ Select All : X Delete B ↑ Move Up ↓ Move Down B = Order Acc ♥ Order Desc	

- 1. **Tabs:** Displays the tabs for designing a query and viewing the results of running a query.
- 2. **Toolbar:** Provides options for clearing, opening, saving, and running selection criteria, and counting the query results.

Option	Description
Clear	Clears all query settings currently displayed in the window.
Open	Clears the query settings currently displayed in the window and opens a saved query.

Save	Saves the query settings currently displayed in the window.
Count	Sums the number of records that match the selection criteria.
Run	Runs the query and displays the results on the Results tab.

- 3. Data Selection tree: Provides a list of data you can select to create a query.
- 4. Select Columns pane: Allows you to select and arrange the columns of data to display in the query results.
- 5. Conditions pane: Allows you to set the conditions for retrieving data.
- 6. **Order pane:** Allows you to set the order for displaying or running data.

Create an Account Analysis Query

Use the Account Analysis page to query accounts based on specific criteria and analyze the results.

To create an account analysis query

1. On the Welcome page, click Account Analysis. The Account Analysis page appears.

Address Address_Confirmation Address_Confirmation Address_Confirmation Address_Confirmation Address_Confirmation	Run Exclude Duplicate Records Maximum Records 500 Select Columns Select All Select All Select All Select All	-
Address Address Address Address Address Address Address Address Address AWG AWG AWG AWG New CareAndHardship	Maximum Records 100 (* Select Columns	-
Comments Complaint	File Number Customer Account Number	
P Court	R Status Conditions ✓ Select Al I Zeak X Delete I ↑ Move Up ↓ Move Down I Copy Ø Paste I ■ Group I Ope And S	-
Dispute	Order ✓ Select All I X Delete I ↑ Move Up ↓ Move Down I ≜ Order Acc F Order Desc	-

- 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, specify which data items to display as columns in the query results. For more information about working with columns, see <u>Query Columns</u>.
- 5. In the **Conditions** pane, specify one or more conditions. For more information about working with conditions, see <u>Query Conditions</u>.

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- 6. In the **Order** pane, specify the sort order for the query results. For more information about the query results sort order, see <u>Specify the Query Results Sort Order</u>.
- 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.

ok In: My Queries	➤ Delete <u>+</u> Export To File
lame	Date Created
DemoTest	2020-06-03
an - Testi	2020-06-04
est	2020-06-04
DemoTestNew	2020-06-04
1	2020-06-23
est123	2020-06-23

- b. In the Query Name box, type a name for the query and then click Save.
- c. To convert the saved query to a panel query, select **Is Panel Query?** check box.
- 9. To export the query, in the **Save Query Dialog** box, click **Export To File**. Query file is downloaded.
- 10. To delete a saved query, in the **Save Query Dialog** box, click **Delete** to delete a saved query.

Modify an Account Analysis Query

Use the Account Analysis page to modify a query for analyzing accounts.

To modify an account analysis query

1. On the **Welcome** page, click **Account Analysis**. The **Account Analysis** page appears.

Account Analysis

Account Query Results		
Clear : 27 Open	E Count	0
Accounts Address Address_Confirmation AIM AWG AWG AWG AWG New CareAndNardship Collateral Comments Complaint Complaint Consolidation	Exclude Duplicate Records Maximum Records Maximum Records Select Columns ✓Select All X Duluts X Duluts X Duluts X Duplicate Records File Number Exclude Duplicate Records Status	-
Consolidation New Court Debt Forwarding Debt Forwarding Debtor Demographics Debtor Bankönfo DebtorCreditCands Debtors	Conditions	-
Delinquency Dialers Dispute Documentation Early Stage Data Events Financial Interactions Inthefactions	Order Select All Image: Conder Up Image: Conder Asc Image: Conder Asc	-

2. In the toolbar, click **Open**. The **Open Query Dialog** box appears.

Name	Date Created
DemoTest	2020-06-03
lan - Test1	2020-06-04
test	2020-06-04
DemoTestNew	2020-06-04
41	2020-06-23
test123	2020-06-23

- 3. In the **Name** column, click the query and then click **Open**. The query appears on the **Account Analysis** page.
- 4. Modify the query.
- 5. To save the query, do the following:
- a. In the toolbar, click **Save**. The **Save Query Dialog** box appears.

Latitude Printable Help for Administrators

ok In: My Queries	~	X Delete 🛨 Export To File
Name		Date Created
DemoTest		2020-06-03
lan - Testi		2020-06-04
test		2020-06-04
DemoTestNew		2020-06-04
41		2020-06-23
test123		2020-06-23
uery Name:		

b. Click Save.

Tip:

- To save the query with a different name, in the **Query Name** box, type a new name for the query and then click **Save**. The original query remains unchanged and the system creates a query.
- To convert the saved query to a panel query, select **Is Panel Query?** check box.
- 6. To export the query, in the **Save Query Dialog** box, click **Export To File**. Query file is downloaded.
- 7. To delete a saved query, in the **Save Query Dialog** box, click **Delete** to delete a saved query.

Run an Account Analysis Query

Use the **Account Analysis** page to run an account analysis query.

To run an account analysis query

Account Analysis

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DebtorCreditCards	Current Balance	
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Work Strategies		
Blank Literal Condition		

2. In the toolbar, click **Run**. The results appear on the **Results** tab.

Account Query	Results									
						Export	to Excel 🛛 🖻 Export to	Comma Separated File	Export to XMI	
Drag a column hea	ader and drop it here to group l	by that column								
File Number	Customer :	Account Number	Status :	Queue Level	Queue Date	Desk E	Branch :	Current Balance	Received Date	
1000	0000001 - CUSTOMER ONE	7738184767075	ACT - ACTIVE ACCOUNT **	(100) ACCOUNT REASSIGNED	6/8/2016	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$967.47	2/11/2011	4
1001	0000001 - CUSTOMER ONE	7738179391196	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$2,455.77	2/11/2011	
1002	0000001 - CUSTOMER ONE	045313MB01	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/15/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$819.47	2/11/2011	
1003	0000001 - CUSTOMER ONE	30032419801	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$7,960.47	2/11/2011	
.004	0000001 - CUSTOMER ONE	7738174035038	ACT - ACTIVE ACCOUNT **	(120) OVER 120 DAYS OLD	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$2,467.42	2/11/2011	
1005	0000001 - CUSTOMER ONE	7738201009121	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$1,307.21	2/11/2011	
.006	0000001 - CUSTOMER ONE	7738186225254	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/15/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$167.73	2/11/2011	
.007	0000001 - CUSTOMER ONE	7738153940687	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/15/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$596.03	2/11/2011	
1008	0000001 - CUSTOMER ONE	5424180026420601	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/15/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$476.55	2/11/2011	
1009	0000001 - CUSTOMER ONE	63171689685307	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/15/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$596.60	2/11/2011	,
H A 1 2	3 4 5 6 7 8	9 10 > M	10 🗸 items per page	2					1 - 10 of 1424 it	em

- 3. To export the results to a file, see <u>Export Query Results</u>.
- 4. For more information about working with query results, see <u>Query Results</u>.

Query Columns

Query Columns

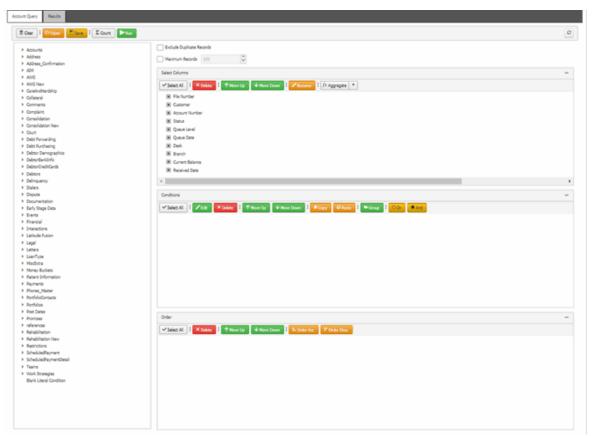
Use the **Select Columns** pane on the **Account Analysis** page to specify the data columns to include in the query result set. A default set of columns appears in the **Select Columns** pane when you first open the page.

Add a Query Column

Use the **Select Columns** pane on the **Account Analysis** page to specify the data items to include as columns in the query results.

To add a query column

1. Ensure that a query is open on the **Account Analysis** page.



- 2. In the **Data Selection** tree, expand nodes to locate the data item to include as a column.
- 3. Drag and drop the data item into the **Select Columns** pane.
- 4. Continue adding columns as necessary.

Delete a Query Column

Use the **Select Columns** pane on the **Account Analysis** page to exclude a column from the query results.

To delete a query column

Account Analysis

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2. In the **Select Columns** pane, click the column name and then click **Delete**.

Modify the Query Column Order

Use the **Select Columns** pane on the **Account Analysis** page to change the order in which columns of data appear in the query results.

To modify the order of a query column

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2. In the Select Columns pane, click a column name and then click Move Up or Move Down.

Modify the Query Column Name

Use the **Select Columns** pane on the **Account Analysis** page to modify the name of a column included in the query results.

To modify the name of a query column

Account Analysis

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- 2. In the **Select Columns** pane, click the column and then click **Rename**. The column name changes to 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 **Current Balance** column to **Account Balance**, the column name changes to **Current Balance as Account Balance**.

Assign an Aggregate Function to a Column

Use the **Select Columns** pane on the **Account Analysis** page to assign an aggregate function to a column. When you run the query, the aggregated values appear in the column instead of the actual value. Nonaggregated columns create the groups represented by the aggregated data.

To assign an aggregate function to a column

Account Query Results		
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Blank Literal Condition		

2. In the Select Columns pane, click the column and then click fx Aggregate.

Select Columns	
✓ Select All : × Delete : ↑ Move Up ↓ Move Down : ∕Rena	me : fx Aggregate 💌
🔣 File Number	Count
🕱 Customer	Maximum
🕱 Account Number	Minimum
R Status	Sum
III Oueue Level	Average
I Oueue Date	Standard Deviation
I Desk	Population Standard Deviation
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	Population Variance
🔀 Current Balance	
🕱 Received Date	

- 3. In the list box, 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 aggregated column name, click **fx Aggregate**, and then, in the list box, click **Remove Aggregate**. The original column name replaces the aggregated column name.

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.

Function	Description
Count	Counts the number of records for the grouping.
Maximum	Calculates the highest value within the grouping.
Minimum	Calculates the lowest value within the grouping.
Sum	Totals the values within the grouping.
Average	Averages the values within the grouping.
Standard Deviation	Averages the difference from the mean value of the entire set of accounts included.
Population Standard Deviation	Averages the difference from the mean value within the grouping.
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.

Query Conditions

Query Conditions

Use the **Conditions** pane on the **Account Analysis** page to specify the criteria for data to include in the query result set.

Create a Query Condition

Use the **Conditions** pane on the **Account Analysis** page to specify the criteria for which data to include in the query results.

To create a query condition

Account Query Results		
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- 2. In the **Data Selection** tree, expand nodes to locate the data item to include as a condition.
- 3. Drag and drop the data item into the **Conditions** pane or right-click the data item and select **Add to Conditions** from the list.

The following example shows the criteria for the **Account Open?** condition.

Account Open?	
Is the account open?	
●The account is open	
The account is closed	
The account has been returned	
The account has been returned	Okay

- 4. Specify the criteria, and then click **OK**.
- 5. Continue adding conditions as necessary.
- 6. To apply the And operator, do the following:
 - a. After adding the required conditions to the **Conditions** pane, click And.
 - b. In the toolbar, click **Count**. The results appear in the **Query Designer** dialog box. Click **OK**.

- 7. To apply the OR operator, do the following:
 - a. After adding the required conditions to the **Conditions** pane, click **Or**.
 - b. In the toolbar, click **Count**. The results appear in the **Query Designer** dialog box. Click **OK**.

Modify a Query Condition

Use the **Conditions** pane on the **Account Analysis** page to modify a query condition.

To modify a query condition

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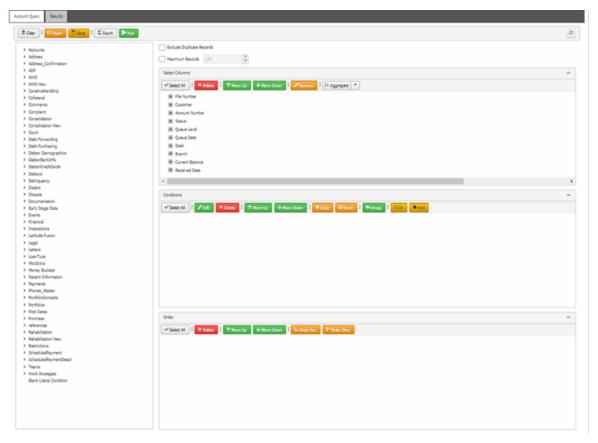
- 2. To add a condition to the **Conditions** pane, do the following:
- a. In the **Data Selection** tree, expand nodes to locate the data item to include as a condition.
- b. Drag and drop the data item into the **Conditions** pane.
 - 3. To modify the criteria for a condition, in the Conditions pane, do the following
 - a. Click the condition and then click Edit.
 - b. Modify the criteria and then click **OK**.
 - 4. To apply the And operator, do the following:

- a. After adding the required conditions to the **Conditions** pane, click And.
- b. In the toolbar, click **Count**. The results appear in the **Query Designer** dialog box. Click **OK**.
- 5. To apply the OR operator, do the following:
 - a. After adding the required conditions to the **Conditions** pane, click **Or**.
 - b. In the toolbar, click **Count**. The results appear in the **Query Designer** dialog box. Click **OK**.

Copy a Query Condition

Use the **Conditions** pane on the **Account Analysis** page to copy a query condition.

To copy a query condition



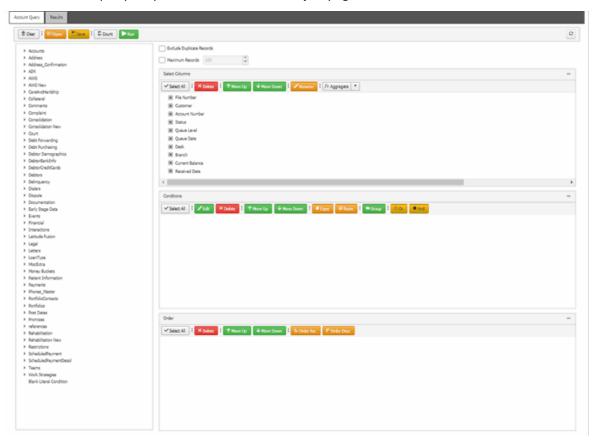
- 2. In the **Conditions** pane, click a condition and then, in the toolbar, click **Copy**. The system copies the condition to the Clipboard.
- 3. In the **Conditions** pane, click where you want to copy the condition and then click **Paste**. The system copies the condition to the specified location.

Group Query Conditions

Use the **Conditions** pane on the **Account Analysis** page to separate conditions into groups when you require complex data mining.

To group query conditions for evaluation

1. Ensure that a query is open on the **Account Analysis** page.



- 2. In the **Conditions** pane, click the condition to group and then click **Group**. The system groups the selected conditions and flags the beginning and ending of the group.
- 3. Continue grouping conditions as necessary.

Note: To remove a condition from a group, click the condition and then click **Delete**.

Modify the Query Condition Order

Use the **Conditions** pane on the **Account Analysis** page to change the order in which the system evaluates conditions.

To modify the order of query conditions

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Patient Information		
Payments		
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PortfolioContacts		
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Post Dates	Dolar	_
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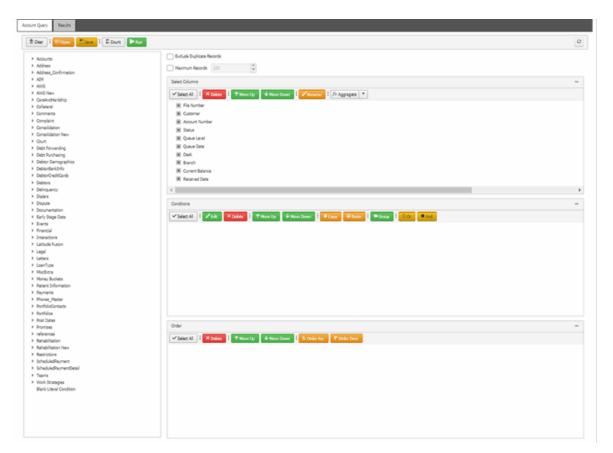
2. In the **Conditions** pane, click a condition and then click **Move Up** or **Move Down**.

Delete a Query Condition

Use the **Conditions** pane on the **Account Analysis** page to delete a condition from a query.

To delete a query condition

Account Analysis



2. In the **Conditions** pane, click the condition and then click **Delete**.

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:

- <u>Dates</u>
- Single option
- Multiple option

Dates

Date conditions allow you to query accounts based on a <u>specific date</u>, <u>date range</u>, <u>any date or blank</u> <u>date</u>, or <u>relative date</u>. 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:

Value is	Description	Example
	Include accounts in the query results where the date matches the date specified.	Closed Date is 01/01/2012.
	Include accounts in the query results where the date does not match the date specified.	Closed Date is any date except 01/01/2012.
Equal To	Include accounts in the query results where the date matches or comes after the date specified.	Closed Date is 01/01/2012 or any date after 01/01/2012.
Equal To	Include accounts in the query results where the date matches or comes before the date specified.	Closed Date is 01/01/2012 or any date before 01/01/2012.
	Include accounts in the query results where the date comes after the date specified.	Closed Date is after 01/01/2012, but not on 01/01/2012.
	Include accounts in the query results where the date comes before the date specified.	Closed Date is before 01/01/2012, but not on 01/01/2012.

In the following example, the system retrieves accounts where the **Closed Date** is 01/01/2014.

Closed Date

Value is	Equal To	~	C Relative	06/25/2020		
					Okay	Cancel

Date range

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

Value is	Description
Between	Retrieves accounts where the date falls between two specific dates.
	Retrieves accounts where the date comes before a specific start date or after a specific end date, but not between the two dates.

In the following example, the system retrieves accounts where the **Closed Date** falls on or between 01/01/2014 and 06/30/2014.

\sim	_	-	_	Ы		_	÷.	_
U	U	5	e	u	υ	d	υ	e

Value is	Between	♥ 🗆 Relativ	e 06/25/2020		
		C Relative	06/25/2020		
				Okay	Cancel

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:

Value is	Description
No Value	Retrieves accounts where the date is blank.
Any Value	Retrieves accounts where the date is any date or blank.

In the following example, the system retrieves accounts where the **Closed Date** is blank (doesn't contain a value).

Closed Date

Value is	No Value	~	□ Relative	06/25/2020		
					Okay	Cancel

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:

Value is	Description
Equal To	Retrieves accounts where the date matches the relative date.

Not Equal To	Retrieves accounts where the date does not match the relative date.
Later Than or Equal To	Retrieves accounts where the date matches or comes after the relative date.
Earlier Than or Equal To	Retrieves accounts where the date matches or comes before the relative date.
Later Than	Retrieves accounts where the date comes after the relative date.
Earlier Than	Retrieves accounts where the date comes before the relative date.

Single option

Single option conditions allow you to retrieve accounts that match a single option in a group of options. In the following example, the system retrieves accounts that are open.

Account Open?	×
Is the account open?	
●The account is open	
The account is closed The account has been returned	
	Okay Cancel

Multiple options

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 multiple accounts options by selecting the check boxes.

-	s : ue is one of the following ue is not one of the following					
Search	Code	:	Description	:	Status Type	:
	NPC		NSF STILL HAS PDCS ON FILE **		ACTIVE	-
	ATY		ATTORNEY REPRESENTED ON ACCT		ACTIVE	
•	ACT		ACTIVE ACCOUNT **		ACTIVE	
	AEX		ALL EFFORTS EXHAUSTED		CLOSED	•
н	1 2 3 4 * M					1 - 10 of 31 items

Query Results

Query Results

Use the **Results** tab on the **Account Analysis** page to view the results of a query and change the results view.

Specify the Query Results Sort Order

Use the **Order** pane on the **Account Analysis** page to specify the sort order for the data returned in the query results. For example, if desk and customer appear in the **Order** pane, the query results sort first by desk and then by customer within the desk.

To specify the sort order for query results

Account Query Results		
The Court Plan		0
+ Accounts	📄 Birdule Duglane Records	
Address Address_Confirmation	Narimum Records 100	
> ADM > AUVG	Select Columns	-
 ANG Nev CareAndHardhip 	Select Al. × Dates ↑ Nove Up ↓ Nove Down ✓ Reserve fr Approprie ▼	
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Comments Complaint	Customer R Acosult Number	
 Consolidation 	 accurate of the second s	
Consolidation New Court	R Queue tanal	
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Debt Purchasing Debtor Demographics	it our R Bach	
DebtorBankDrfo DebtorCedtCants	(R) Current Balance	
Debtors	(#) Received Date	
Delinquency Dalers	4	×.
> Dispute	Conditions	-
Documentation Early Stage Data	V Selet Al Vick X Dates T How to V Now Dawn P Capy Office Con Rect	
> Events > Financial		
Interactions		
Lattude Fusion Legal		
Eathers		
 LoanType MacDota 		
Money Buckets Patient Information		
Payments		
Phones_Master PortfolioContacts		
Portfolios Port Dates		
 Promises 	Order	-
 references Rehabilitation 	V Schet Al X Dates + Nove Up + Nove Down & Order Acc 7 Order Desc	
Rehabilitation New Restrictions		
ScheduledPayment		
ScheduledPaymentDetail Teams		
Work Strategies		
Blank Uteral Condition		

- 2. In the Data Selection tree, expand nodes to locate the data item to include as a column.
- 3. Drag and drop the data item into the **Select Columns** pane.
- 4. Continue adding data items as necessary.

Note: 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 <u>Assign an Aggregate Function to a Column</u>.

- 5. To delete a data item from the sort, in the **Order** pane, click the data item and then click **Delete**.
- 6. To change the sort order, in the **Order** pane, click the data item and then click **Move Up** or **Move Down**.
- 7. To sort in ascending order, in the **Order** pane, click the data item and then click **Order Asc**.
- 8. To sort in descending order, in the **Order** pane, click the data item and then click **Order Desc**.

Arrange Query Column Headings

Use the **Results** tab on the **Account Analysis** page to change the order in which columns appear in the query results.

To arrange query column headings

Account Analysis

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Accounts	Exclude Duplicare Records	
Address	Natimum Records 100	
Address_Confirmation		
ADM	Select Columns	
AUVG		
AIVS New	Select All X Delaw * Move Date / Rever Date / Aggregate *	
CareAndHardship		
Collateral	■ Fishurber	
Commenta	Cutomer	
Complaint	Account Number	
Consolidation	N Satur	
Consolidation New	B Queue Land	
Court		
Debt Forwarding	I Queue Date	
Debt Purchasing	B Deck	
Debtor Demographics	E Banch	
DebtorBankInfo	Current Balance	
DebtorCreditCards	N Received Date	
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Restrictions		
ScheduledPayment		
ScheduledPaymentDetail		
Teams		
Work Strategies		
Blank Literal Condition		

2. In the toolbar, click **Run**. The results appear on the **Results** tab.

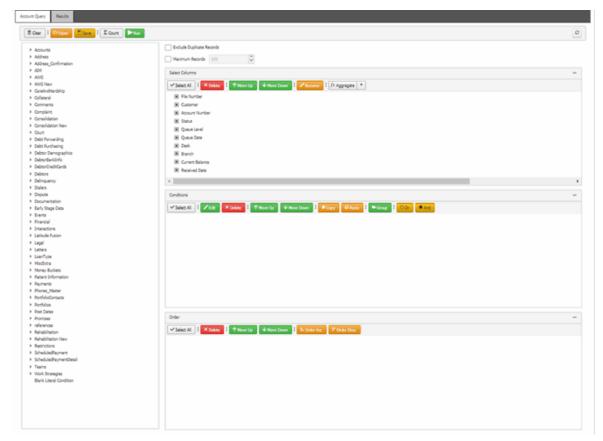
						Export to E	ccel 🖹 Export to Com	nd beparated The	Export to XML
rag a column hea	ader and drop it here to group	by that column							
le Number	Customer E	Account Number	Status :	Queue Level	Queue Date	Desk E	Branch :	Current Balance	Received Date
000	0000001 - CUSTOMER ONE	7738184767075	ACT - ACTIVE ACCOUNT **	(100) ACCOUNT REASSIGNED	6/8/2016	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$967.47	2/11/2011
01	0000001 - CUSTOMER ONE	7738179391196	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$2,455.77	2/11/2011
002	0000001 - CUSTOMER ONE	045313MB01	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$819.47	2/11/2011
03	0000001 - CUSTOMER ONE	30032419801	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$7,960.47	2/11/2011
004	0000001 - CUSTOMER ONE	7738174035038	ACT - ACTIVE ACCOUNT **	(120) OVER 120 DAYS OLD	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$2,467.42	2/11/2011
005	0000001 - CUSTOMER ONE	7738201009121	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$1,307.21	2/11/2011
106	0000001 - CUSTOMER ONE	7738186225254	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$167.73	2/11/2011
007	0000001 - CUSTOMER ONE	7738153940687	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$596.03	2/11/2011
08	0000001 - CUSTOMER ONE	5424180026420601	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$476.55	2/11/2011
09	0000001 - CUSTOMER ONE	63171689685307	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$596.60	2/11/2011

- 3. Click a column heading and drag it to the new location.
- 4. When a black arrows appears in the location where you want to place the column, release your mouse.

Pin a Query Column

Use the **Results** tab on the **Account Analysis** page to pin a column in the query results so that it remains stationary when you scroll horizontally.

To pin a query column



1. Ensure that a query is open on the **Account Analysis** page.

2. In the toolbar, click **Run**. The results appear on the **Results** tab.

rag a column he	ader and drop it here to group I	by that column							
ile Number	Customer	Account Number	Status	Queue Level	Queue Date	Desk :	Branch	Current Balance	Received Date
000	0000001 - CUSTOMER ONE	7738184767075	ACT - ACTIVE ACCOUNT **	(100) ACCOUNT REASSIGNED	6/8/2016	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$967.47	2/11/2011
001	0000001 - CUSTOMER ONE	7738179391196	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$2,455.77	2/11/2011
002	0000001 - CUSTOMER ONE	045313MB01	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$819.47	2/11/2011
003	0000001 - CUSTOMER ONE	30032419801	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$7,960.47	2/11/2011
004	0000001 - CUSTOMER ONE	7738174035038	ACT - ACTIVE ACCOUNT **	(120) OVER 120 DAYS OLD	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$2,467.42	2/11/2011
005	0000001 - CUSTOMER ONE	7738201009121	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$1,307.21	2/11/2011
006	0000001 - CUSTOMER ONE	7738186225254	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$167.73	2/11/2011
007	0000001 - CUSTOMER ONE	7738153940687	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$596.03	2/11/2011
008	0000001 - CUSTOMER ONE	5424180026420601	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$476.55	2/11/2011
109	0000001 - CUSTOMER ONE	63171689685307	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$596.60	2/11/2011

3. In the column heading, click the column menu and then click **Lock**.

.

Status	÷	Queue Level
ACT - ACTIVE ACCOUN	↑	Sort Ascending
NEW - NEW STATUS **	¥	Sort Descending
NEW - NEW STATUS **	•	Lock
NEW - NEW STATUS **	Ţ	Filter
		Columns

- 4. Scroll horizontally in either direction and the locked column remains stationary.
- 5. To unlock the column, click the lock column menu and then click **Unlock**.

Sort the Query Results

Use the **Results** tab on the **Account Analysis** page to sort the query results.

To sort query results

1. Ensure that a query is open on the Account Analysis page.

Account Query Results		
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ile Number	Customer :	Account Number	Status :	Queue Level	Queue Date	Desk E	Branch :	Current Balance	Received Date
000	0000001 - CUSTOMER ONE	7738184767075	ACT - ACTIVE ACCOUNT **	(100) ACCOUNT REASSIGNED	6/8/2016	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$967.47	2/11/2011
001	0000001 - CUSTOMER ONE	7738179391196	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$2,455.77	2/11/2011
002	0000001 - CUSTOMER ONE	045313MB01	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$819.47	2/11/2011
03	0000001 - CUSTOMER ONE	30032419801	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$7,960.47	2/11/2011
004	0000001 - CUSTOMER ONE	7738174035038	ACT - ACTIVE ACCOUNT **	(120) OVER 120 DAYS OLD	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$2,467.42	2/11/2011
105	0000001 - CUSTOMER ONE	7738201009121	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$1,307.21	2/11/2011
006	0000001 - CUSTOMER ONE	7738186225254	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$167.73	2/11/2011
107	0000001 - CUSTOMER ONE	7738153940687	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$596.03	2/11/2011
008	0000001 - CUSTOMER ONE	5424180026420601	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$476.55	2/11/2011
109	0000001 - CUSTOMER ONE	63171689685307	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$596.60	2/11/2011

3. To sort the column in ascending order, click the column menu and then click **Sort Ascending**. An arrow appears and points up to indicate that the column sorted in ascending order.

Status 🕇 🕴

4. To sort the column in descending order, click the column menu and then click **Sort Descending**. The arrow points down to indicate that the column sorted in descending order.

Add or Remove a Query Column

Use the Results tab on the Account Analysis page to add or remove a column from the query results.

To add or remove a query column

Account Analysis

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Accounts	Evolution Duplicate Records	
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AUVS New	Select Al. 2 X Dates 2 ↑Maxe Up View Down 2 Z Reserve 2 Jr. Appropria 1	
CareAndHardship		
Collateral	■ Fletunber	
Comments	Customer	
Complaint	Account Number	
Consolidation	R Status	
Consolidation New	II Queutiend	
Court	III Queue Cate	
Debt Forwarding		
Debt Purchasing	8 Deck	
Debtor Demographics	I Barch	
DebtorBankInfo DebtorDreditCants	Current Balance	
DebtorCheditCards Debtors	R Received Cete	
Debtors Delinquency		
Deinguercy Dialers	4	
Dispute	Conditions	
Documentation	Constons	
Early Stage Data	Salatt Al i ∕fak X Daha i ↑Noclo ↓ Mon Down i Day ØRata i =Grap i Odr And	
Evers	Control Control Control Control Control Control	
Financial		
Interactions		
Latitude Fusion		
- Legal		
Latters		
LoanType		
MacEstra		
Money Buckats		
Patient Information		
Payments		
Phones_Master		
PortfolioContacts		
Portfolios		
Post Dates	Order	
Promises		
references Rehabilitation	Schutz All X Delete T Nove Up Hove Down & Order Acc. T Order Dec.	
Rehabilitation		
Rehabilitation New		
Schedule/Payment		
Scheduledrayment ScheduledraymentDetail		
Teams		
Work Strategies		
Blank Literal Condition		

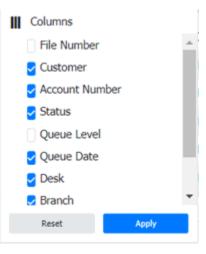
2. In the toolbar, click **Run**. The results appear on the **Results** tab.

						🛛 Export to E	coel 📄 Export to Com	ma Separated File	Export to XML
rag a column hea	ader and drop it here to group i	by that column							
ile Number	Customer :	Account Number	Status :	Queue Level	Queue Date	Desk E	Branch E	Current Balance	Received Date
000	0000001 - CUSTOMER ONE	7738184767075	ACT - ACTIVE ACCOUNT **	(100) ACCOUNT REASSIGNED	6/8/2016	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$967.47	2/11/2011
001	0000001 - CUSTOMER ONE	7738179391196	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$2,455.77	2/11/2011
002	0000001 - CUSTOMER ONE	045313MB01	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$819.47	2/11/2011
003	0000001 - CUSTOMER ONE	30032419801	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$7,960.47	2/11/2011
004	0000001 - CUSTOMER ONE	7738174035038	ACT - ACTIVE ACCOUNT **	(120) OVER 120 DAYS OLD	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$2,467.42	2/11/2011
005	0000001 - CUSTOMER ONE	7738201009121	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$1,307.21	2/11/2011
006	0000001 - CUSTOMER ONE	7738186225254	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$167.73	2/11/2011
007	0000001 - CUSTOMER ONE	7738153940687	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$596.03	2/11/2011
008	0000001 - CUSTOMER ONE	5424180026420601	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$476.55	2/11/2011
009	0000001 - CUSTOMER ONE	63171689685307	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$596.60	2/11/2011

3. In the column heading, click the column menu and then click **Columns**.

Status	: Queue Level
ACT - ACTIVE ACCOUN	↑ Sort Ascending
NEW - NEW STATUS **	↓ Sort Descending
NEW - NEW STATUS **	Lock
	T Filter
NEW - NEW STATUS **	Columns

4. To add a column, select the required column check boxes from the **Columns** list and click **Apply**.



4. To remove a column, clear the column check box from the **Columns** list and click **Apply**.

Group Accounts in the Query Results

Use the **Results** tab on the **Account Analysis** page to group accounts in the query results.

To group accounts in the query results

Account Analysis

i Cear i Droyen Clave i E Coure	An .	
Accounts	Exclude Duplicane Records	
Address	Maximum Records 100	
Address_Confirmation	Maximum Nectords 200	
ADM	Select Columna	
+ AUVG	345 5075	
 AUVS New 	✓ Salet All i X Doket I ↑ Nove Up ↓ Nove Court I /r Approprie I	
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Collateral	E Fielberber	
Comments	Customer	
Complaint.	Account Number	
Consolidation	🗷 Sana	
Consolidation New Court	IR Queue Lavel	
Court Debt Forwarding	III Queue Date	
Debt Purchasing	N Desk	
Debtor Demographics	B land	
DebtorBankOnfo		
DebtorOreditCards	Current Balance	
Debtors	Received Cate	
Delinquency	4	
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Dispute	Conditions	
Decumentation		
Early Stage Data	Select Al 2 / Edit X Dates 7 Move Up + Move Down 2 Gray 2 Dates 2 Grap 2 Cov. • And	
Events		
Financial		
 Interactions 		
Latitude Fusion		
+ Legal		
Letters		
MacEstra		
Money Buckets		
Patient Information		
Payments		
Phones Master		
PortfoloContacts		
Portfolios		
Post Dates		
Promises	Order	
references	Select AL A Delec A Delec AL More Up A Nove Upon A Select Ac P Order Dec	
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Restrictions		
ScheduledPayment ScheduledPaymentDetail		
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rag a column he	ader and drop it here to group	by that column							
ile Number	Customer :	Account Number	Status E	Queue Level	Queue Date	Desk E	Branch :	Current Balance	Received Date
000	0000001 - CUSTOMER ONE	7738184767075	ACT - ACTIVE ACCOUNT **	(100) ACCOUNT REASSIGNED	6/8/2016	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$967.47	2/11/2011
001	0000001 - CUSTOMER ONE	7738179391196	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$2,455.77	2/11/2011
002	0000001 - CUSTOMER ONE	045313MB01	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$819.47	2/11/2011
003	0000001 - CUSTOMER ONE	30032419801	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$7,960.47	2/11/2011
004	0000001 - CUSTOMER ONE	7738174035038	ACT - ACTIVE ACCOUNT **	(120) OVER 120 DAYS OLD	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$2,467.42	2/11/2011
005	0000001 - CUSTOMER ONE	7738201009121	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$1,307.21	2/11/2011
006	0000001 - CUSTOMER ONE	7738186225254	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$167.73	2/11/2011
007	0000001 - CUSTOMER ONE	7738153940687	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$596.03	2/11/2011
008	0000001 - CUSTOMER ONE	5424180026420601	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$476.55	2/11/2011
09	0000001 - CUSTOMER ONE	63171689685307	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$596.60	2/11/2011

- 3. Click a column heading and then drag it into the space above the column headings. Accounts group on the specified column. The following example shows accounts grouped by customer.
- 4. To view the accounts in a group, click the arrow next to the group to expand it.
- 5. To add a group within a group, 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 arrow next to the group header. Groups sort in ascending order by default.
- 7. To delete a group, click X next to the group header.

Summarize Query Data

Use the **Results** tab on the **Account Analysis** page to summarize query results.

To summarize query results

1. Ensure that a query is open on the **Account Analysis** page.

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Dispute Documentation	Conditions	
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Interactions		
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Legal		
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Patient Information		
Payments		
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Portfolios Post Dubes		
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Rehabilitation New		
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rag a column he	ader and drop it here to group	by that column							
le Number	Customer :	Account Number	Status :	Queue Level	Queue Date	Desk E	Branch E	Current Balance	Received Date
000	0000001 - CUSTOMER ONE	7738184767075	ACT - ACTIVE ACCOUNT **	(100) ACCOUNT REASSIGNED	6/8/2016	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$967.47	2/11/2011
001	0000001 - CUSTOMER ONE	7738179391196	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$2,455.77	2/11/2011
102	0000001 - CUSTOMER ONE	045313MB01	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$819.47	2/11/2011
003	0000001 - CUSTOMER ONE	30032419801	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$7,960.47	2/11/2011
104	0000001 - CUSTOMER ONE	7738174035038	ACT - ACTIVE ACCOUNT **	(120) OVER 120 DAYS OLD	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$2,467.42	2/11/2011
05	0000001 - CUSTOMER ONE	7738201009121	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$1,307.21	2/11/2011
006	0000001 - CUSTOMER ONE	7738186225254	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$167.73	2/11/2011
07	0000001 - CUSTOMER ONE	7738153940687	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$596.03	2/11/2011
08	0000001 - CUSTOMER ONE	5424180026420601	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$476.55	2/11/2011
09	0000001 - CUSTOMER ONE	63171689685307	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$596.60	2/11/2011

- 3. In the column heading, click the column menu and then click **Aggregates** and select **Sum**.
- 3. The summary information is displayed at the bottom of the grid.

						🛛 Export t	o Excel Export to C	Comma Separated File	Export to X	ML
Drag a column hea	der and drop it here to group l	by that column								
File Number 🚦	Customer E	Account Number	Status E	Queue Level	Queue Date	Desk :	Branch E	Current Balance	Received Date	÷
1000	0000001 - CUSTOMER ONE	7738184767075	ACT - ACTIVE ACCOUNT **	(100) ACCOUNT REASSIGNED	6/8/2016	0000000 - ADMIN 1 DE5K	00000 - MAIN BRANCH	\$967.47	2/11/2011	
.001	0000001 - CUSTOMER ONE	7738179391196	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DE5K	00000 - MAIN BRANCH	\$2,455.77	2/11/2011	
.002	0000001 - CUSTOMER ONE	045313MB01	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/23/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$819.47	2/11/2011	
.003	0000001 - CUSTOMER ONE	30032419801	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$7,960.47	2/11/2011	
.004	0000001 - CUSTOMER ONE	7738174035038	ACT - ACTIVE ACCOUNT **	(120) OVER 120 DAYS OLD	5/10/2011	0000000 - ADMIN 1 DE5K	00000 - MAIN BRANCH	\$2,467.42	2/11/2011	
.005	0000001 - CUSTOMER ONE	7738201009121	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DE5K	00000 - MAIN BRANCH	\$1,307.21	2/11/2011	
.006	0000001 - CUSTOMER ONE	7738186225254	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/23/2020	0000000 - ADMIN 1 DE5K	00000 - MAIN BRANCH	\$167.73	2/11/2011	
.007	0000001 - CUSTOMER ONE	7738153940687	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/23/2020	0000000 - ADMIN 1 DE5K	00000 - MAIN BRANCH	\$596.03	2/11/2011	
.008	0000001 - CUSTOMER ONE	5424180026420601	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/23/2020	0000000 - ADMIN 1 DE5K	00000 - MAIN BRANCH	\$476.55	2/11/2011	
.009	0000001 - CUSTOMER ONE	63171689685307	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/23/2020	0000000 - ADMIN 1 DE5K	00000 - MAIN BRANCH	\$596.60	2/11/2011	
										⊬

4. To remove the summary information, click the column menu and then click **Aggregates** and then select **Sum** again.

Export Query Results

Use the **Results** tab on the **Account Analysis** page to export the results of a query.

To export query results

1. Ensure that a query is open on the **Account Analysis** page.

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	Evelude Duplicate Records	
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Address	Maximum Racondi 100	
Address_Confirmation		
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> AUVG		
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+ Evens		
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Interactions		
Latitude Fusion		
> Legal		
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LoanType		
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Money Buckets		
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ScheduledPayment		
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P Teams		
Work Strategies		
Blank Literal Condition		

						Deport to Ex	ccel 📄 Export to Com	ma Separated File	Export to XML
rag a column hei	ader and drop it here to group i	by that column							
ile Number	Customer :	Account Number	Status :	Queue Level	Queue Date	Desk E	Branch :	Current Balance	Received Date
000	0000001 - CUSTOMER ONE	7738184767075	ACT - ACTIVE ACCOUNT **	(100) ACCOUNT REASSIGNED	6/8/2016	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$967.47	2/11/2011
001	0000001 - CUSTOMER ONE	7738179391196	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$2,455.77	2/11/2011
002	0000001 - CUSTOMER ONE	045313MB01	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$819.47	2/11/2011
003	0000001 - CUSTOMER ONE	30032419801	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$7,960.47	2/11/2011
004	0000001 - CUSTOMER ONE	7738174035038	ACT - ACTIVE ACCOUNT **	(120) OVER 120 DAYS OLD	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$2,467.42	2/11/2011
005	0000001 - CUSTOMER ONE	7738201009121	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$1,307.21	2/11/2011
006	0000001 - CUSTOMER ONE	7738186225254	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$167.73	2/11/2011
007	0000001 - CUSTOMER ONE	7738153940687	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$596.03	2/11/2011
008	0000001 - CUSTOMER ONE	5424180026420601	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$476.55	2/11/2011
009	0000001 - CUSTOMER ONE	63171689685307	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$596.60	2/11/2011

- 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 appear as the element tags.

The corresponding **Export** file downloads.

Import Query Results

Use the Account Query tab on the Account Analysis page to import the results of a query.

To import a query, do the following:

1. In the toolbar, click **Open**. The **Save Query Dialog** box appears.

Name	Date Created
DemoTest	2020-06-03
an - Test1	2020-06-04
est	2020-06-04
DemoTestNew	2020-06-04
41	2020-06-23
est123	2020-06-23

2. Click Import From File, select the required file and click Open.

Note: If required, you can import a Latitude 10 query into Liquid Latitude.

Filter Query Results

Use the **Results** tab on the **Account Analysis** page to filter query results. For more information about custom filter operators, see <u>Set Custom Filter Criteria</u>.

To filter query results

- T

1. Ensure that a query is open on the **Account Analysis** page.

Account Query Results		
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> ADI > AUG	Select Columns	-
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Rahabilitation Rahabilitation New		
Restrictions		
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Work Strategies		
Blank Literal Condition		

2. In the toolbar, click **Run**. The results appear on the **Results** tab.

						Export to E	xcel 🕒 Export to Com	ma Separated File	Export to XML
rag a column hea	der and drop it here to group	by that column							
ile Number	Customer :	Account Number	Status :	Queue Level	Queue Date	Desk E	Branch E	Current Balance	Received Date
000	0000001 - CUSTOMER ONE	7738184767075	ACT - ACTIVE ACCOUNT **	(100) ACCOUNT REASSIGNED	6/8/2016	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$967.47	2/11/2011
001	0000001 - CUSTOMER ONE	7738179391196	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$2,455.77	2/11/2011
002	0000001 - CUSTOMER ONE	045313MB01	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$819.47	2/11/2011
003	0000001 - CUSTOMER ONE	30032419801	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$7,960.47	2/11/2011
004	0000001 - CUSTOMER ONE	7738174035038	ACT - ACTIVE ACCOUNT **	(120) OVER 120 DAYS OLD	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$2,467.42	2/11/2011
005	0000001 - CUSTOMER ONE	7738201009121	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$1,307.21	2/11/2011
006	0000001 - CUSTOMER ONE	7738186225254	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$167.73	2/11/2011
007	0000001 - CUSTOMER ONE	7738153940687	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$596.03	2/11/2011
800	0000001 - CUSTOMER ONE	5424180026420601	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$476.55	2/11/2011
009	0000001 - CUSTOMER ONE	63171689685307	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$596.60	2/11/2011

3. In the column header, click the column menu and then click Filter.

4. To filter the columns, do the following:

▼ Filter	
Contains	•
And 🔻	
Contains	•
Clear	Filter

- a. Select the required option from the **Contains** list and then type the filtering criteria. You can type more than one criteria and apply **And/Or** clause to combine them.
- b. Click Filter.

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

Account Analysis

Accounts Address	Enclude Duplicane Records	
Address		
Address_Confirmation	Navinum Records 100	
ADM	Canada and C	
AUG	Select Columns	
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CareAndHardship	A here on a second a	
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Comments	* Cutomer	
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Debt Purchasing	18 Desk	
Debtor Demographics	8 Banh	
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DebtorOreditCards		
Debtors	IR Received Data	
Delinquency	4	
Dalers		
Dispute	Conditions	
Documentation		
Early Stage Data	≪Selett Al : Zahr Char : Alancia +	
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Interactions		
Latitude Fusion		
Legal		
Letters		
LoenType		
MacEstra		
Noney Buckets		
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Paymenta		
Phones_Master		
PortfolioContacts		
Portfolios		
Post Dates		
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Restrictions		
ScheduledPayment		
ScheduledPaymentDetail		
Teams		
Work Strategies		
Blank Uteral Condition		

2. In the toolbar, click **Run**. The results appear on the **Results** tab.

						Export to E	cel 🖹 Export to Com	ma Separated rife	Export to XML
rag a column hea	der and drop it here to group	by that column							
le Number	Customer E	Account Number	Status E	Queue Level	Queue Date	Desk E	Branch 🗄	Current Balance	Received Date
000	0000001 - CUSTOMER ONE	7738184767075	ACT - ACTIVE ACCOUNT **	(100) ACCOUNT REASSIGNED	6/8/2016	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$967.47	2/11/2011
001	0000001 - CUSTOMER ONE	7738179391196	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$2,455.77	2/11/2011
002	0000001 - CUSTOMER ONE	045313MB01	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$819.47	2/11/2011
003	0000001 - CUSTOMER ONE	30032419801	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$7,960.47	2/11/2011
004	0000001 - CUSTOMER ONE	7738174035038	ACT - ACTIVE ACCOUNT **	(120) OVER 120 DAYS OLD	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$2,467.42	2/11/2011
005	0000001 - CUSTOMER ONE	7738201009121	NEW - NEW STATUS **	(875) Linked Account (Non Driver)	5/10/2011	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$1,307.21	2/11/2011
006	0000001 - CUSTOMER ONE	7738186225254	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$167.73	2/11/2011
007	0000001 - CUSTOMER ONE	7738153940687	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$596.03	2/11/2011
008	0000001 - CUSTOMER ONE	5424180026420601	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$476.55	2/11/2011
109	0000001 - CUSTOMER ONE	63171689685307	NEW - NEW STATUS **	(015) NEW ACCOUNTS	6/18/2020	0000000 - ADMIN 1 DESK	00000 - MAIN BRANCH	\$596.60	2/11/2011

3. In the column header, click the column menu and then click **Filter**.

▼ Filter	
Contains	•
And 🔻	
Contains	•
Clear	Filter

- 4. Select the required option from the **Contains** list and then type the filtering criteria in the below box. You can type more than one criteria and apply **And/Or** clause to combine them.
- 5. Click Filter.

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.

Operator	Description
ls equal to	Include accounts in the query results where the data matches the specified value.
ls not equal to	Include accounts in the query results where the data does not match the specified value.
Contains	Includes accounts in the query results where data contains the specified character or characters. This operator is for alphanumeric data types only.
Does not contain	Includes accounts in the query results where data does not contain the specified character or characters. This operator is for alphanumeric data types only.
Starts with	Includes accounts in the query results where data starts with the specified character or characters. This operator is for alphanumeric data types only.

Ends with	Includes accounts in the query results where data ends with the specified character or characters. This operator is for alphanumeric data types only.
ls null	Includes accounts in the query results where the data contains no value.
ls not null	Includes accounts in the query results where the data contains any value.
ls empty	Includes accounts in the query results where the data is empty.
ls not empty	Includes accounts in the query results where the data is not empty.

System Administration

System Administration

Administrators, managers, and supervisors can configure system codes, settings, permissions, and policies to customize the Latitude suite of products according to your organization's preferences.

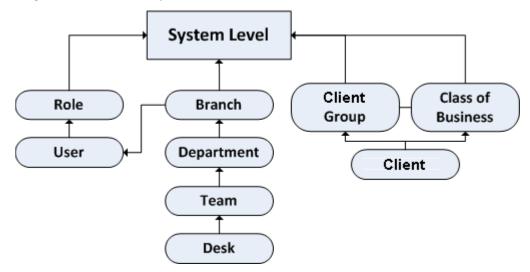
Permissions and Policies

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 Latitude to apply permissions and policies differently, based on the user or other criteria. Latitude 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 and policy. For example, a system-level permission applies to all roles, unless an administrator customizes the permission 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 permissions and policy structure, split into 4 categories: system, user, desk, and client. These scopes create a hierarchical tree that extends back to the system level. The following diagram shows each scope within its hierarchical structure.



Scopes available for each permission vary. Latitude determines which permissions to use by following hierarchy lines. For example, if a permission doesn't apply at the user scope, Latitude checks the role scope. If it doesn't apply at the role scope, Latitude checks the system scope. It's also possible to check permissions for both a particular user and a particular 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 particular client.

Latitude checks branch permissions based on the user's assigned branch, along with the branch permissions for the user's assigned desk. Latitude 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. Latitude 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).

Search for a Permission or System Code

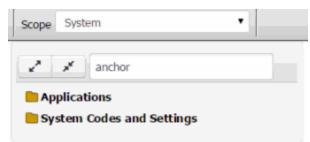
Use the **Administration** page to search for a permission or system code.

To search for a permission or system code

1. Open the Latitude by Genesys page.

🧮 🥳 Latitude by Genesys	Agent/Collector Info	Logout	O Help
ල් ල් ල් ල්			
Agent Desktop Batch Processor Administration Account Analysis			
Version: 20.2.0.82 DB Server Name: ase512dev.qfun.com Database: Collect2000			
In the menu bar, click Administration .		_	_
Scope System			
Search			
Administration			
Applications			
Configuration			
Management Tools			
Security			
Services			
System Codes and Settings			

 In the Search box, type the full or partial name of the permission or scope and then press Enter. The system displays only the folders that contain items that match your search criteria.



4. In the **Navigation** pane, expand a folder and then click an item to view it.

Scope System	
anchor	+
Applications	Standard Delinquency
System Codes and Settings Accounts	Standard Recovery
Anchor Cards Anchors	× Test

5. To clear the search criteria, delete the content in the **Search** box.

Set a Permission and Policy

Use the **Administration** page to set permissions and policies for a scope. For more information about scopes and individual permissions and policies, see <u>Permissions and Policies</u>.

To set a permission and policy

1. Open the Latitude by Genesys page.



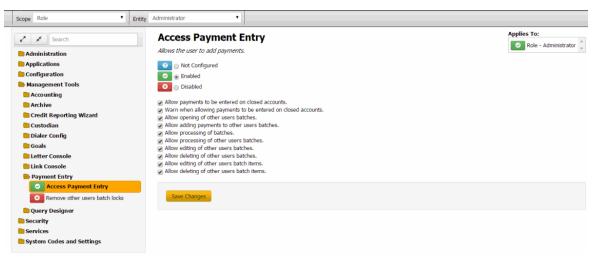
2. In the menu bar, click **Administration**.

System	•
🖌 Search	
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pplications	
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anagement Tools	
ecurity	
ervices	
stem Codes and Settings	
	Search Iministration oplications onfiguration anagement Tools ecurity ervices

- 3. In the **Navigation** pane, do one of the following:
- a. Expand one or more folders to locate the permission.

Tip: To expand all the folders and sub-folders, click the Expand Tree icon next to the **Search** box. To collapse all the folders and sub-folders, click the Collapse Tree icon next to the **Search** box.

- b. Do the steps to Search for a Permission or System Code.
- 4. In the **Navigation** pane, click a permission. The panel for the selected permission appears. The following example shows the Access Payment Entry permission for the Administrator role.



Scope: Scope level at which to apply the permission (for example, system, role, user, branch). If a permission isn't available for a scope, the system displays a message.

Entity: Entity within the scope to which to apply the permission.

Expand Tree icon: Expands all folders and sub-folders.

Collapse Tree icon: Collapses all folders and sub-folders.

Search: Allows you to search for a permission.

Not Configured: Your organization didn't configure the permission at the selected scope and entity level. The selected scope and entity level can inherit the settings from a higher level.

Enabled: Permission applies at the selected scope and entity level.

Disabled: Permission doesn't apply at the selected scope and entity level, regardless of how it's configured at a higher level.

Policy: Rules to apply to the permission. In the example, the check boxes represent the policy. Not all permissions have policies.

Applies to: Scope and entity to which the permission selected in the Navigation tree applies.

- 5. In the toolbar, specify the scope and entity for the permission.
- 6. In the permission pane, select a configuration option (Not Configured, Enabled, or Disabled) for the selected scope and entity.
- 7. If there is a policy associated to the permission, 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. Latitude follows the most restrictive setting, which is the lower amount set at the customer level.

8. Click Save Changes.

Administration Settings

Administration Settings

Use administration settings to specify permissions and policies for system control, system codes, users, roles, and permissions and policies.

System Configuration Permission

Use the System Configuration permission to specify whether users can maintain Latitude <u>configuration</u> <u>settings</u>, such as your organization's name and contact information.

Location

In the Navigation pane, click Administration > System Configuration.

Scope

This permission is available for all scopes.

Policy

N/A

System Codes and Settings Permission

Use the System Codes and Settings permission to specify whether users can maintain <u>system codes and</u> <u>settings</u>. If you disable the permission for the role or user scope, the role or user cannot access the System Codes and Settings folder or its sub-folders.

Location

In the Navigation pane, click Administration > System Codes and Settings.

Scope

This permission is available for all scopes.

Policy

N/A

Users, Roles, Permissions, and Policies Permission

Use the Users, Roles, Permissions, and Policies permission to specify whether users can maintain <u>users</u>, <u>roles</u>, <u>permissions</u>, <u>and policies</u>. If you disable the permission for the role or user scope, the role or user cannot open the Administration tool. If your organization hasn't configured this permission, only the Administrator **account** (not an Administrator user) can maintain this information.

Location

In the Navigation pane, click Administration > Users, Roles, Permissions, and Policies.

Scope

This permission is available for all scopes.

Policy

N/A

Application Settings

Application Settings

Use application settings to specify permissions and policies for supplemental programs.

AIM Settings

AIM Settings

Use the AIM settings to specify permissions and policies for Agency Interface Module (AIM).

Access Reports Permission

Use the Access Reports permission to specify whether users can display reports in AIM.

Location

In the Navigation pane, click Applications > AIM > 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 AIM.

Location

In the Navigation pane, click Applications > AIM > 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 add, modify, and delete account filters in AIM.

Location

In the Navigation pane, click Applications > AIM > 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 add, modify, and delete agencies in AIM.

Location

In the Navigation pane, click Applications > AIM > 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 add, modify, and delete business rules in AIM.

Location

In the Navigation pane, click Applications > AIM > 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 add, modify, and delete distribution templates in AIM.

Location

In the Navigation pane, click Applications > AIM > 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 in AIM. Also allows the user to import and export files.

Location

In the Navigation pane, click Applications > AIM > Run Actions.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Use AIM Permission

Use the Use AIM permission to specify whether users can open AIM.

Location

In the Navigation pane, click Applications > AIM > Use AIM.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

View Account Filters Permission

Use the View Account Filters permission to specify whether users can view account filters in AIM.

Location

In the Navigation pane, click Applications > AIM > 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 Navigation pane, click Applications > AIM > 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 Navigation pane, click Applications > AIM > View Business Rules.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

View Distribution Templates Permission

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

Location

In the Navigation pane, click Applications > AIM > View Distribution Templates.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Settings for Auxiliary Products Permission

Use the Settings for Auxiliary Products permission to specify settings to allow Exchange, AIM, AIM Receiver, and Job Manager to create payments in Latitude.

Location

In the Navigation pane, click Applications > Auxiliary Products >Settings for Auxiliary Products.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify the URL and API key that allow Exchange, AIM, AIM Receiver, and Job Manager to create payments. Enable the permission for a scope and then specify the settings.

URL for Processing Financial Transactions Through Collector: URL to display the Batch Processor in Latitude.

API Key for Collector: API key for using the Latitude Web Service.

CUBE Server Config Permission

Use the Server Config permission to specify settings for Latitude CUBE, which is an online data warehouse that provides multidimensional views into transaction-level data for improved data mining.

Location

In the Navigation pane, click Applications > Cube > Server Config Policy.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch
- Department
- Team
- Desk

Policy

The policy allows your organization to specify the settings for the Latitude CUBE. Enable the permission for a scope and then specify the settings.

Server for the location of the InteractionCollector.Cube: Path to the SQL Analysis Services Server (SSAS) where your organization installed the Latitude CUBE. You can use the Windows server name, IP address, local host, or a named instance.

Analysis Services Database name of the InteractionCollector.Cube: Name of the SQL Analysis Services database that contains the Latitude CUBE. The default name is InteractionCollector.Cube.

Dashboard Settings

Dashboard Settings

Use the Dashboard settings to specify permissions and policies for Dashboard.

Manage Dashboards Permission

Use the Manage Dashboards permission to specify whether users can view, create, and modify the dashboards in Dashboard.

Location

In the Navigation pane, click Applications > Dashboard > 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 a user can view and the default dashboard to display when a user logs on to Dashboard.

Location

In the Navigation pane, click Applications > Dashboard > View Dashboards.

Scope

This permission is available for the following scopes:

- System
- Role
- User

- Branch
- Department
- Team
- Desk

Policy

The 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 Dashboard.

View Dashboards: If you selected a dashboard, it displays when users log on to Dashboard.

Exchange Settings

Exchange Settings

Use the Exchange settings to specify permissions and policies for Exchange Manager.

Modify Client Configuration Permission

Use the Modify Client Configuration permission to specify whether users can modify configuration items in Exchange Manager.

Location

In the Navigation pane, click Applications > Exchange > Modify Client Configuration.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Use Exchange Permission

Use the Use Exchange permission to specify whether users can open Exchange Manager.

Location

In the Navigation pane, click Applications > Exchange > Use Exchange.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Use Fusion Permission

Use the Use Fusion permission to specify whether users can open Fusion.

Location

In the Navigation pane, click Applications > Fusion > Use Fusion.

Scope

This permission is available for the all scopes.

Policy

N/A

Liquid Latitude Settings

Liquid Latitude Settings

Use the Liquid Latitude settings to specify permissions and policies for Latitude.

Access Accounts Settings

Access Accounts Settings

Use the Access Accounts settings to specify permissions and policies for viewing and working accounts.

Access Account Permission

Use the Access Account permission to specify whether users can view or work accounts. A user who doesn't have this permission can search for an account but cannot view it.

Location

In the Navigation pane, click Applications > Liquid Latitude > Access Accounts > Access Account.

Scope

This permission is available for all scopes.

Policy

N/A

Access Accounts in Another Desk Permission

Use the Access Accounts in Another Desk permission to specify whether users can view or work accounts assigned to another user's desk.

Location

In the Navigation pane, click Applications > Liquid Latitude > Access Accounts > Access Accounts in Another Desk.

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 or work an account assigned to an outside collection agency or attorney. A user who doesn't have this permission can search for an AIM account but cannot view it.

Location

In the Navigation pane, click Applications > Liquid Latitude > Access Accounts > Access AIM Assigned Account.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Access Archived Account Permission

Use the Access Archived Account permission to specify whether users can view archived accounts. A user who doesn't have this permission can search for an archived account but cannot view it. This permission is not related to the user's permissions to archive or restore accounts.

Location

In the Navigation pane, click Applications > Liquid Latitude > Access Accounts > Access Archived Account.

Scope

This permission is available for all scopes.

Policy

N/A

Access Outside Branch Permission

Use the Access Outside Branch permission to specify whether users can view accounts not assigned to a desk within the user's assigned branch.

Location

In the Navigation pane, click Applications > Liquid Latitude > Access Accounts > Access Outside Branch.

Scope

This permission is available for all scopes.

Policy

N/A

Access Restricted Access Accounts Permission

Use the Access Restricted Access Accounts permission to specify whether users can view accounts that have restrictions. This permission is unavailable currently.

Location

In the Navigation pane, click Applications > Liquid Latitude > Access Accounts > Access Restricted Access Accounts.

Scope

This permission is available for all scopes.

Policy

N/A

Access Returned Account Permission

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

Location

In the Navigation pane, click Applications > Liquid Latitude > Access Accounts > Access Returned Account.

Scope

This permission is available for all scopes.

Policy

N/A

Configure Data Protection Validation Instructions Permission

Use the Configure Data Protection Validation Instructions permission to specify the instructions to display in the **DPA Validation** dialog box for validating a call.

Location

In the Navigation pane, click Applications > Liquid Latitude > Access Accounts > Configure Data Protection Validation Instructions.

Scope

This permission is available for the following scopes:

- System
- Business Class
- Client Group
- Client

Policy

The policy allows you to specify the instructions for validating a call. Enable the permission for a scope and then specify the criteria.

Data Validation Instructions: Instructions to users on how to verify that they are speaking to the correct customer or authorized third party before discussing an account.

Queues Settings

Queues Settings

Use the Queues settings to specify permissions and policies for work queues.

Change Continue Queuing Setting Permission

Use the Change Continue Queuing Setting permission to specify whether users can flag an account to include in the Collector queue while it's pending work in a Supervisor or Clerical queue.

Location

In the Navigation pane, click Applications > Liquid Latitude > Access Accounts > Queues > Change Continue Queuing Setting.

Scope

This permission is available for all scopes.

Policy

N/A

Custom Queue Options Permission

Use the Custom Queue Options permission to specify the rules to apply to the Custom queue.

Location

In the Navigation pane, click Applications > Liquid Latitude > Access Accounts > Queues > Custom Queue Options.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

The policy allows your organization to specify the rules to apply to the Custom queue. Enable the permission for a scope and specify the settings.

Enforce collector queueing rules: If selected, prevents queueing of accounts assigned to a queue level that doesn't queue, should not queue, or a user contacted the accounts on the current date.

Enforce time zone rules: If selected, prevents queueing of accounts that are not in a callable time zone based on the state and postal code associated to the account.

Queue Providers Permission

Use the Queue Providers permission to specify the queues that are available to the user. For more information, see Work Queues.

Location

In the Navigation pane, click Applications > Liquid Latitude > Access Accounts > Queues > Queue Providers.

Scope

This permission is available for all scopes:

- System
- Role
- User
- Branch

Policy

The policy allows your organization to specify the queues that are available to users. Enable the permission for a scope and then specify the queues. If you select a queue, it's available to users.

Select None: Clears all selected items in the list.

Select All: Selects all items in the list.

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

Require Data Protection Validation Permission

Use the Require Data Protection Validation permission to specify whether to display a dialog box containing information for validating a caller before displaying the account.

Location

In the Navigation pane, click Applications > Liquid Latitude > Access Accounts > Require Data Protection Validation.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Search Permission

Use the Search permission to specify settings for searching for accounts.

Location

In the Navigation pane, click Applications > Liquid Latitude > Access Accounts > Search > Search.

Scope

This permission is available for all scopes.

Policy

The policy allows you to specify settings for searching for accounts. Enable the permission for a scope and then specify the criteria.

Default Quick Search Field: Default criteria available to the user when searching for an account using the "quick search" feature.

Search Fields: If you select a field, it displays on the Simple tab in the Search Accounts panel.

Search Result Fields: If you select a field, it displays on the Results tab in the Search Accounts panel.

Select None: Clears all selected items in the list.

Select All: Selects all items in the list.

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

View Other User Payments Permission

Use the View Other User Payments permission to specify whether users can view payments that other users processed. For more information, see View Applied and Planned Payments.

Location

In the Navigation pane, click Applications > Liquid Latitude > Access Accounts > View Other User Payments.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Account Actions Settings

Account Actions Settings

Use the Account Actions settings to specify permissions and policies for the actions users can take on accounts.

Access Redirect Portal Permission

Use the Access Redirect Portal permission to specify the web site to open in a new browser tab when a user clicks the link on the account toolbar. No data passes from Latitude to this web site. For more information, see Display a Web Site on a New Browser Tab.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Actions > Access Redirect Portal.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

The policy allows you to specify the web site to display on a new tab in your browser. Enable the permission for a scope and then specify the URL.

URL: Address of the web site to display on a new browser tab.

AIM Place/Recall Functionality Permission

Use the AIM Place/Recall Functionality permission to specify whether users can place an account with an outside collection agency or attorney, and recall the placed account. For more information, see Placements and Recalls.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Actions > AIM Place/Recall Functionality.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Allow Creation of Holds Permission

Use the Allow Creation of Holds permission to specify whether users can place collection holds at the account and customer levels. For more information, see Collection Holds.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Actions > Allow Creation of Holds.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Allow Manual Linking/Unlinking Permission

Use the Allow Manual Linking/Unlinking permission to specify whether users can link and unlink accounts manually. For more information, see Add a Link to an Account and Remove all Links to an Account.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Actions > Allow Manual Linking/Unlinking.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Allow Start/Stop Interest Permission

Use the Allow Start/Stop Interest permission to specify whether users can start and stop client interest on accounts. For more information, see Manage Interest.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Actions > Allow Start/Stop Interest.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Auto Close Account Permission

Use the Auto Close Account permission to specify whether users can have the system close an interaction automatically under the following conditions:

- User searches for and selects an account using the Search Accounts or Quick Search feature.
- User moves to the next account in the work queue when working accounts in a queue.
- User closes the work queue when working accounts in a queue.
- User selects another account from inventory.
- User selects another account from account history.

For more information, see Open Interactions.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Actions > Auto Close Account.

Scope

This permission is available for all scopes.

Policy

N/A

Change Desk Permission

Use the Change Desk permission to specify whether users can assign an account to another desk. For more information, see Change a Desk Assignment.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Actions > Change Desk.

Scope

This permission is available for all scopes.

Policy

The policy allows your organization to specify which desks users can move accounts from and indicate desks to which they can reassign accounts. Enable the permission for a scope and then specify the settings.

Restrict the desk from which the user may move the account: If selected, your organization restricts the desks a user can move an account from.

Restrict Desks: Indicates whether the user can move accounts assigned to the specified desks. Valid values are:

- Allow moving accounts from the following desks: The user can move accounts from the specified desks.
- **Deny moving accounts from the following desks:** The user cannot move accounts from the specified desks.

Desks: If you selected a desk and the **Allow moving accounts from the following desks** option, users can move accounts from that desk. If you selected a desk and the **Deny moving accounts from the following desks** option, users cannot move accounts from that desk.

Restrict the desk to which the user may move the account: If selected, your organization restricts the desks a user can move an account to.

Restrict Desks: Indicates whether the user can move accounts to the specified desks. Valid values are:

- Allow moving accounts to the following desks: The user can move accounts to one of the specified desks.
- **Deny moving accounts to the following desks:** The user cannot move accounts to one of the specified desks.

Desks: If you selected a desk and the **Allow moving accounts to the following desks** option, users can move accounts to that desk. If you selected a desk and the **Deny moving accounts to the following desks** option, users cannot move accounts to that desk.

Select None: Clears all selected items in the list.

Select All: Selects all items in the list.

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

Change Status Permission

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

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Actions > Change Status.

Scope

This permission is available for all scopes.

Policy

The 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, your organization restricts the statuses a user can change an account from.

Restrict Statuses: Indicates whether the user can change the status for accounts in the specified statuses. Valid values are:

- Allow changing accounts from the following statuses: The user can change the status of accounts in one of the specified statuses.
- **Deny changing accounts from the following statuses:** The user cannot change the status of accounts in one of the specified statuses.

Statuses: If you select a status and the **Allow changing accounts from the following statuses** option, users can change the status of accounts in that status. If you select a status and the **Deny changing accounts from the following statuses** option, users cannot change the status of accounts in that status. For example, you can indicate whether the user can or cannot change the status of accounts that have a "pending" status to some other status.

Restrict the status to which the user may change the account: If selected, your organization restricts the statuses a user can change an account to.

Restrict Statuses: Indicates whether the user can change account statuses to the specified statuses. Valid values are:

• Allow changing accounts to the following statuses: The user can change the status of accounts to one of the specified statuses.

• **Deny changing accounts to the following statuses:** The user cannot change the status of accounts to one of the specified statuses.

Statuses: If you select a status and the **Allow changing accounts to the following statuses** option, users can change the status of accounts to that status. If you select a status and the **Deny changing accounts to the following statuses** option, users cannot change the status of accounts to that status. For example, you can indicate whether the user can or cannot change accounts to a "pending" status.

Select None: Clears all selected items in the list.

Select All: Selects all items in the list.

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

Require Note on Account Permission

Use the Require Note on Account permission to specify whether your organization requires the user to add a note to accounts before moving to another account in the Collector queue.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Actions > Require Note on Account.

Scope

This permission is available for all scopes.

Policy

The policy allows you to specify whether users must add notes containing action or result codes that meet specific criteria before moving to the next account in the Collector 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 signifying a worked 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 signifying an attempted contact.

Set Follow-up Date Permission

Use the Set Follow-up Date permission to specify whether users can set follow-up dates on accounts. For more information, see Set an Account Follow-up Date.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Actions > Set Follow-up Date.

Scope

This permission is available for the following scopes:

- System
- Role

- User
- Branch

Policy

N/A

Set Reminders for Others Permission

Use the Set Reminders for Others permission to specify whether users can set a reminder for accounts assigned to another desk. For more information, see Set a Timed Reminder.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Actions > Set Reminders.

Scope

This permission is available for all scopes.

Policy

N/A

Account Data Settings

Account Data Settings

Use the Account Data settings to specify permissions and policies for account data.

Allow Collateral Editing Permission

Use the Allow Collateral Editing permission to specify whether users can modify automotive and nonautomotive collateral information on the **Collateral** panel. For more information, see Collateral.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Collateral > Allow Collateral Editing.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Care and Financial Hardship Panel Permission

Use the Care and Financial Hardship Panel permission to configure the **Care and Financial Hardship** panel. For more information, see Care and Financial Hardship.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Care and Financial Hardship > Care and Financial Hardship Panel Config.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

The policy allows your organization to configure the **Care and Financial Hardship** panel. Enable the permission for a scope and then specify the settings.

View Care Types: If selected, users can view care types.

Edit Care: If selected, users can modify care information.

Approve Hold Days: If selected, users can approve the number of days to place the account on hold to suspend collection activity.

Override Hold Days: If selected, users can override the default number of days to place the account on hold to suspend collection activity.

Edit the Care and Financial Hardship Comment: If selected, users can add or modify comments regarding a care or financial hardship case.

Complaints Panel Permission

Use the Complaints Panel permission to configure the **Complaints** panel. For more information, see Complaints.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Complaints > Complaints Panel Config.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

The policy allows your organization to configure the **Complaints** panel. Enable the permission for a scope and then specify the settings.

Close Complaint: If selected, users can close complaints.

Application Settings

Reopen Complaint: If selected, users can reopen complaints.

Edit Compensation Amount: If selected, users can specify the compensation amount. View Compensation Amount: If selected, users can view the compensation amount. View Complaint Outcome: If selected, users can view the outcome of a complaint. View Complaint Details: If selected, users can view details about a complaint. Assign Complaint Owner: If selected, users can assign an owner to the complaint. Assign and Edit Department: If selected, users can assign a department to the complaint. Assign and Edit Complaint Category: If selected, users can assign a category to the complaint. Edit Complaint Against: If selected, users can specify who the complaint is against. Edit Referred by: If selected, users can specify who referred the customer. Edit Investigation to Date: If selected, users can modify the details of the investigation. Edit Complaint Justified: If selected, users can specify whether the complaint is justified. Edit Complaint Outcome: If selected, users can specify the outcome of the complaint. Edit Complaint Outcome: If selected, users can specify the outcome of the complaint. Edit Complaint Outcome: If selected, users can specify the outcome of the complaint. Edit Complaint Outcome: If selected, users can specify the outcome of the complaint. Edit Complaint Outcome: If selected, users can specify the outcome of the complaint. Enable Existing Complaint Button: If selected, users can remove a duplicate complaint.

Edit Root Cause: If selected, users can modify the root cause of the complaint.

Credit Reporting Settings

Credit Reporting Settings

Use the Credit Reporting settings to specify permissions and policies for reporting accounts to credit bureaus.

Allow Delete Options Permission

Use the Allow Delete Options permission to specify whether users can delete accounts from credit reporting for reasons such as reported in error, fraud, or account paid by insurance. For more information, see the following topics:

- Send Delete Request for Account Reported in Error
- Send Delete Request for Account Reported Based on Fraud
- Send Delete Request for Medical Account

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Credit Reporting > Allow Delete Options.

Scope

This permission is available for all scopes.

Policy

N/A

Allow Manual Evaluation Permission

Use the Allow Manual Evaluation permission to specify whether users can run a manual evaluation of an account for credit reporting purposes. For more information, see Evaluate an Account for Credit Reporting.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Credit Reporting > Allow Manual Evaluation.

Scope

This permission is available for all scopes.

Policy

N/A

Allow Prevent Flag and Undo Delete Permission

Use the Allow Prevent Flag and Undo Delete permission to specify whether users can undo credit reporting delete requests for the following:

- Accounts reported in error.
- Accounts with a customer who is a victim of fraud.
- Accounts that insurance is paying or paid in full.

For more information, see Undo a Credit Reporting Delete Request.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Credit Reporting > Allow Prevent Flag and Undo Delete.

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 credit reporting settings. For more information, see Credit Bureau Reporting.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Credit Reporting > Alter Credit Reporting Settings.

Scope

This permission is available for all scopes.

Policy

N/A

Utility Tab Permission

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

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Credit Reporting > Utility Tab.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Disputes Panel Permission

Use the Disputes Panel permission to configure the **Disputes** panel. For more information, see Disputes.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Disputes > Disputes Panel Config.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

The policy allows your organization to configure the **Disputes** panel. Enable the permission for a scope and then specify the settings.

Edit Dispute Type: If selected, users can specify the dispute type.

Edit Received Date: If selected, users can specify the dispute received date.

Edit Referred by: If selected, users can specify who referred the customer.

Edit Dispute Details: If selected, users can specify the details of the dispute.

Edit Dispute Category: If selected, users can specify the dispute category.

Edit Dispute Against: If selected, users can specify who the dispute is against.

Edit Dispute Justified: If selected, users can specify whether the dispute is justified.

Edit Dispute Outcome: If selected, users can specify the outcome of the dispute.

Documentation Settings

Documentation Settings

Use the Documentation settings to specify permissions and policies for account documentation.

Attach Documentation Permission

Use the Attach Documentation permission to specify whether users can attach documentation to accounts. For more information, see Attach a Document to an Account.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Documentation > Attach Documentation.

Scope

This permission is available for the following scopes:

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

Policy

The policy allows your organization to specify which document categories are available to users when attaching documents to accounts. Enable the permission for a scope and then specify the codes.

Permitted Categories: If you select a documentation category, it's available when users attach documents to accounts. For information about creating documentation categories, see <u>Documentation</u> <u>Categories</u>.

Select None: Clears all selected items in the list.

Select All: Selects all items in the list.

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

Delete Documentation Permission

Use the Delete Documentation permission to specify whether users can delete documentation attached to accounts. For more information, see Delete a Document From an Account.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Documentation > Delete Documentation.

Scope

This permission is available for the following scopes:

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

Policy

N/A

View Attached Documents Permission

Use the View Attached Documents permission to specify whether users can view documents that are attached to accounts. For more information, see View Documents Attached to an Account.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Documentation > View Attached Documents.

Scope

This permission is available for the following scopes:

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

Policy

The policy allows your organization to specify which documentation categories are available to users when viewing documents that are attached to accounts. Enable the permission for a scope and then specify the codes.

Permitted Categories: If you select a documentation category, it's available when users view documents attached to accounts. For information about creating documentation categories, see <u>Documentation</u> <u>Categories</u>.

Select None: Clears all selected items in the list.

Select All: Selects all items in the list.

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

Extra Data Settings

Extra Data Settings

Use the Extra Data settings to specify permissions and policies for custom data.

Create Extra Data Permission

Use the Create Extra Data permission to specify whether users can add custom data. For more information, see Add Extra Data.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Extra Data > Create Extra Data.

Scope

This permission is available for all scopes.

Policy

N/A

Update Extra Data Permission

Use the Update Extra Data permission to specify whether users can modify custom data. For more information, see Modify Extra Data.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Extra Data > Update Extra Data.

Scope

This permission is available for all scopes.

Policy

N/A

Fusion Services - Verify Responses Permission

Use the Fusion Services - Verify Responses permission to specify whether users can flag the responses received from outside vendors as verified. For more information, see Verify a Response From an Outside Service Provider.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Fusion Services > Verify Responses.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Income and Expenditure Settings

Income and Expenditure Settings

Use the Income and Expenditure settings to specify permissions and policies for income and expenditures.

Maintain Income and Expense Items Permission

Use the Maintain Income and Expense Items permission to specify whether users can add and modify income, expenditure, and arrears information in the **Income and Expenditure** panel. For more information, see Income and Expenditures.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Income & Expenditure > Maintain Income & Expense Items.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Trigger Values Permission

Use the Trigger Values permission to specify the Common Financial Statement trigger values for expenditures. For more information, see Add Expenses.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Income & Expenditure > Trigger Values.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to configure trigger values for income and expenditures. Enable the permission for a scope and then specify the settings.

Specify the trigger values for each category of person: first adult, other adults, children under 14, and children aged 14-18.

Phone: Maximum amount that your organization considers normal for telephone expenses.

Travel: Maximum amount that your organization considers normal for travel expenses. Travel expenses include car tax, insurance, fuel, and other travel expenses such as public transport.

Housekeeping: Maximum amount that your organization considers normal for housekeeping expenses.

Other: Maximum amount that your organization considers normal for other expenses.

Labels - User Policy Permission

Use the User Policy permission to specify whether users can create, assign, view, or delete account labels. You can use account labels to flag accounts for your own purpose. For example, you can use account labels as tags, conditions, or properties. For more information, see Account Labels Card.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Labels > User Policy.

Scope

This permission is available for all scopes.

Policy

The policy allows your organization to specify whether users can view, add, associate, and delete account labels. Enable the permission for a scope and then specify the settings.

User can Add an Existing Label to an Account: Allows the user to select an existing label and associate it to an account.

User can Create and Add a Newly Defined Label to an Account: Allows the user to create account labels and add them to accounts.

User can Delete a label from an Account: Allows the user to delete labels from accounts.

Legal Settings

Legal Settings

Use the Legal settings to specify permissions and policies for legal judgments against accounts.

Award/Reverse Judgment Permission

Use the Award/Reverse Judgment permission to specify whether users can award and reverse judgments on accounts. For more information, see Award a Judgment.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Legal > Award/Reverse Judgment.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Delete Legal Case Permission

Use the Delete Legal Case permission to specify whether users can delete legal cases. For more information, see Delete a Legal Case.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Legal > Delete Legal Case.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Judgment Award Bucket Mappings Permission

Use the Judgment Award Bucket Mappings permission to map judgment awards to the money buckets to which to apply the award. For more information, see Award a Judgment.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Legal > Judgment Award Bucket Mappings.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify the money buckets to which to apply judgment awards. Enable the permission for a scope and then specify the settings.

Note: The values in the list boxes are based on money titles that your organization specified in system configuration. For more information, see <u>Maintain Money Titles</u>.

Principal Award: Money bucket in which to store the judgment amount awarded for principal.

Interest Award: Money bucket in which to store the judgment amount awarded for interest.

Court Cost Award: Money bucket in which to store the judgment amount awarded for court costs.

Attorney Cost Award: Money bucket in which to store the judgment amount awarded for attorney costs.

OtherCost1 Award through **OtherCost5 Award:** Money buckets in which to store the judgment amount awarded for other costs.

Miscellaneous Cost Award: Money bucket in which to store the judgment amount awarded for miscellaneous costs.

Update Interest Permission

Use the Update Interest permission to specify whether users can update interest for the linked accounts in a judgment. For more information, see Update Interest on Linked Accounts in a Judgment.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Legal > Update Interest.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Letters Settings

Letters Settings

Use the Letters settings to specify permissions and policies for letter requests.

Delete Request Permission

Use the Delete Request permission to specify whether users can delete pending letter requests and system-generated letter requests. If you enable the permission, users can delete pending letter requests that the user created. For more information, see Delete a Pending Letter Request.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Letters > Delete Request.

Scope

This permission is available for all scopes.

Policy

The policy allows your organization to specify whether users can delete system-generated letter requests. Enable the permission for a scope and then specify the settings.

Can delete system generated letters: If selected, the user can delete system-generated letter requests.

OnHold Request Permission

Use the OnHold Request permission to specify whether users can place pending letter requests on hold for an account. For more information, see Suspend a Pending Letter Request.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Letters > OnHold Request.

Scope

This permission is available for all scopes.

Policy

N/A

Linked Letters Permission

Use the Linked Letters permission to specify whether users can specify the linked accounts to include when requesting a letter that can include linked accounts. For more information, see Request a Letter.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Letters > Linked Letters.

Scope

This permission is available for all scopes.

Policy

N/A

Request Permission

Use the Request permission to specify whether users can request a letter for an account. For more information, see Request a Letter.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Letters > Request.

Scope

This permission is available for all scopes.

Policy

N/A

Misc Extra Data Settings

Misc Extra Data Settings

Use the Misc Extra Data settings to specify permissions and policies for miscellaneous extra data. Miscellaneous extra data is any type of information related to an account that users cannot record elsewhere within Latitude.

Create Misc Extra Data Permission

Use the Create Misc Extra Data permission to specify whether users can add miscellaneous extra data. For more information, see Add Miscellaneous Extra Data.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Misc Extra Data > Create Misc Extra Data.

Scope

This permission is available for all scopes.

Policy

N/A

Update Misc Extra Data Permission

Use the Update Misc Extra Data permission to specify whether users can modify miscellaneous extra data. For more information, see Modify Miscellaneous Extra Data.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Misc Extra Data > Update Misc Extra Data.

Scope

This permission is available for all scopes.

Policy

N/A

Name Template Config Permission

Use the Name Template Config permission to specify the format to use to display names in Latitude.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Name Template Config.

Scope

This permission is available for the system scope only.

Policy

The policy allows your organization to specify the format for displaying names. Enable the permission for a scope and then specify the settings.

Template: Template to apply to names when displaying them in Latitude. The order in which you place the tokes is the order the system displays them in Latitude. Place formatting outside the curly brackets. For example, to display names in the system as "Doe, John E", type the following:

{{last}}, {{first}} {{middle}}

Notes Settings

Notes Settings

Use the Notes settings to specify permissions and policies for account notes.

Allow Redaction Permission

Use the Allow Redaction permission to specify whether users can redact (obscure) all or a portion of a note comment. For more information, see Redact an Account Note Comment.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Notes > Allow Redaction.

Scope

This permission is available for all scopes.

Policy

N/A

Create Notes Permission

Use the Create Notes permission to specify whether users can add notes to accounts. For more information, see Add an Account Note.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Notes > Create Notes.

Scope

This permission is available for all scopes.

Policy

The policy allows your organization to specify which action and result codes are available to users when adding notes to an account. Enable the permission for a scope and then specify the codes.

Restrict the available action codes to the following: If selected, the action codes available to users only includes the ones specified.

Action Codes: If you select an action code, it's available when users add notes to accounts.

Restrict the available result codes to the following: If selected, the result codes available to users only include the ones specified.

Result Codes: If you select a result code, it's available when users add notes to accounts.

Select None: Clears all selected items in the list.

Select All: Selects all items in the list.

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

Create Private Notes Permission

Use the Create Private Notes permission to specify whether users can add private notes to accounts. Only users who have the **View Private Notes** permission can see private notes. For more information, see Add an Account Note.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Notes > Create Private Notes.

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 accounts. For more information, see View Account Notes.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Notes > View Private Notes.

Scope

This permission is available for all scopes.

Policy

N/A

Parties Settings

Parties Settings

Use the Parties settings to specify permissions and policies for the parties on accounts.

Update Address Permission

Use the Update Address permission to specify whether users can modify the addresses on accounts. For more information, see Modify an Address.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Parties > Update Address.

Scope

This permission is available for all scopes.

Policy

N/A

Update Name Permission

Use the Update Name permission to specify whether users can modify the names on accounts. For more information, see Maintain Contact Information.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Parties > Update Name.

Scope

This permission is available for all scopes.

Policy

N/A

Update Name Alias Permission

Use the Update Name Alias permission to specify whether users can modify the alias names on accounts. For more information, see Maintain Contact Information.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Parties > Update Name Alias.

Scope

This permission is available for all scopes.

Policy

N/A

Update Responsibility - Add Permission

Use the Update Responsibility - Add permission to specify whether users can designate the party responsible for an account. For more information, see Maintain Contact Information.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Parties > Update Responsibility - Add.

Scope

This permission is available for all scopes.

Policy

N/A

Update Responsibility - Remove Permission

Use the Update Responsibility - Remove permission to specify whether users can indicate that a party on an account is not responsible for the account. For more information, see Maintain Contact Information.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Parties > Update Responsibility - Remove.

Scope

This permission is available for all scopes.

Policy

N/A

Update SSN Permission

Use the Update SSN permission to specify whether users can modify an SSN on an account. This permission is not in use currently.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Parties > Update SSN.

Scope

This permission is available for all scopes.

Policy

N/A

View SSN Permission

Use the View SSN permission to specify whether users can view SSNs on accounts. This permission is not in use currently.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Parties > View SSN.

Scope

This permission is available for all scopes.

Policy

N/A

Phones Settings

Phones Settings

Use the Phones settings to specify permissions and policies for phone numbers associated to accounts.

Change Phone Consent Permission

Use the Change Phone Consent permission to specify whether users can modify the permission to call, auto-dial, text, or fax a phone number. For more information, see Add a Phone Number to an Account and Modify an Account Phone Number.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Phones > Change Phone Consent.

Scope

This permission is available for all scopes.

Policy

N/A

Create Phone Numbers Permission

Use the Create Phone Numbers permission to specify whether users can add phone numbers to accounts. For more information, see Add a Phone Number to an Account.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Phones > Create Phone Numbers.

Scope

This permission is available for all scopes.

Policy

N/A

Mask Phone Numbers Permission

Use the Mask Phone Numbers permission to specify whether to mask all phone number occurrences in Latitude and the Genesys Cloud client. The Genesys Cloud client is available for Genesys Cloud integrations only.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Phones > Mask Phone Numbers.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify the settings for masking phone numbers. Enable the permission for a scope and then specify the settings.

Trailing Digits to Display: Number of trailing phone number digits to display instead of asterisks (*). For example, if you type "2", the last two digits of the phone number display and the remaining digits appear as asterisks.

Phone Type Mapping Permission

You can use the Phone Type Mapping permission in Latitude to map phone types to an action code. When a user or campaign places a call to a specific type of phone (for example, home phone), Latitude assigns the associated action code.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Phones > Phone Type Mapping.

Scope

This permission is available for all scopes.

To map a phone type

- 1. In the **Scope** list box, click the scope for the permission and then, in the **Phone Type Mapping** panel, click **Enabled**.
- 2. In the **Action Codes** list box, click the default action code to use for a phone type that doesn't have an action code mapped.
- 3. In the mapping section, do the following:
 - a. Click the plus sign (+). A blank row appears.

Home	•	TELEPHONED RESIDENCE *
Work	•	TELEPHONED EMPLOYER •
	•	·

- b. In the **Phone Type** box, click a phone type to map to a Latitude action code.
- c. In the **Action Code** box, click the Latitude action code to map to the phone type.
- d. Continue mapping phone types as necessary and then click **Save Changes**.

Update Phone Numbers Permission

Use the Update Phone Numbers permission to specify whether users can modify phone numbers on accounts. For more information, see Modify a Phone Number on an Account.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Phones > Update Phone Numbers.

Scope

This permission is available for all scopes.

Policy

N/A

Update Phone Status Permission

Use the Update Phone Status permission to specify whether users can modify the status of phone numbers on accounts. For more information, see Change the Status of an Account Phone Number or Modify a Phone Number on an Account.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Phones > Update Phone Status.

Scope

This permission is available for all scopes.

Policy

N/A

Update Phone Type Permission

Use the Update Phone Type permission to specify whether users can modify the phone types on accounts. For more information, see Modify a Phone Number on an Account.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Phones > Update Phone Type.

Scope

This permission is available for all scopes.

Policy

N/A

RDN Integration

Allow RDN Case Creation and Updates Permission

Use the Allow RDN Case Creation and Updates permission to specify whether users can create and update vehicle recovery cases on the **RDN Integration** panel. Latitude integrates with the RDN system to allow the exchange of recovery case data. For more information, see RDN Integration.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > RDN Integration > Allow RDN Case Creation and Updates.

Scope

This permission is available for the following scopes:

• System

- Role
- User

Policy

N/A

RDN Service Configuration

Use the RDN Service Configuration permission to specify the URL and API key for the RDN system. Latitude integrates with the RDN system to allow the exchange of recovery case data. For more information, see RDN Integration.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > RDN Integration > RDN Service Configuration.

Scope

This permission is available for the system scope only.

Policy

The policy allows your organization to specify the URL and API key for the RDN system. Enable the permission for a scope and then specify the settings.

RDN URL: URL and API key for the RDN system. When you save the information, the system masks the API key for security purposes.

Scheduled Payments Settings

Scheduled Payments Settings

Use the Scheduled Payments settings to specify permissions and policies for scheduled payments.

Allow Overpayments Permission

Use the Allow Overpayments permission to specify whether to allow payment arrangements that exceed the account balance and if so, the maximum overpayment percentage allowed. For more information, see Propose a Payment Arrangement.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Scheduled Payments > Allow Overpayments.

Scope

This permission is available for the following scopes:

- System
- Business Class
- Client
- Client Group

Policy

The policy allows your organization to specify the settings for overpayments. Enable the permission for a scope and then specify the setting.

Maximum Over Payment Percent (0 = No Limit): Maximum percentage of the account balance that users are allowed to increase the payment by when scheduling overpayments. For example, if the account balance is \$100 and the maximum overpayment percentage allowed is 10%, users cannot create an overpayment arrangement for more than \$110. If you specify zero (0), no limitation applies.

Create Scheduled Payments Permission

Use the Create Scheduled Payments permission to specify the settings for scheduling payments on an account. For more information, see Arrangements.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Scheduled Payments > Create Scheduled Payments.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

The policy allows your organization to specify the settings for scheduling payments on an account. Enable the permission for a scope and then specify the settings.

Minimum Payment Amount: Minimum amount required for a payment where no future scheduled payments exist, or the first payment in the arrangement.

Maximum Days to Payment: Maximum number of days into the future that you can post-date the payment or first payment in the arrangement.

Minimum Balance to Create an Arrangement: Minimum account balance required to create a payment arrangement.

Basis for Minimum Balance: Amount that represents the minimum balance.

Allow Mixing of Payment Types for an Arrangement: If selected, the user can include more than one payment type in a payment arrangement.

Allow Overpayments for Ad Hoc Payments: If selected, the user can schedule a payment when the payment is more than the current balance less the sum of the existing scheduled payments.

Accrue Interest: If selected, arrangements accrue interest.

Settlements Not Allowed: If selected, users cannot create SIF arrangements.

Maximum Total Number of Scheduled Payments (0 = unlimited): Maximum number of payments that the payment arrangement can include. If you specify zero (0), no limitation applies.

Minimum Subsequent Payment Amount: Minimum amount required for all payments that follow the first payment in the arrangement.

Minimum Days Between Payments (0 = disable): Minimum number of days required between payments in the payment arrangement. If you specify zero (0), no limitation applies.

Maximum Days Between Payments (0 = disable): Maximum number of days required between payments in the payment arrangement. If you specify zero (0), no limitation applies.

Maximum Days to Last Payment (0 = disable): Maximum number of days into the future from the current date that the user can create the last payment in the payment arrangement.

Maximum Balance Not to Exceed: Maximum amount the account balance cannot exceed.

Accepted Payment Types: If you select a payment type, it's available when users create or reschedule scheduled payments.

Accepted Credit Cards: If you select a credit card type, it's available when users create or reschedule scheduled payments.

Filter Payment Frequencies: If selected, only the frequencies selected in the **Acceptable Payment Frequencies** list box are available when users create or reschedule scheduled payments. If cleared, all payment frequencies are available when users create or reschedule scheduled payments, regardless of what you have selected in the **Acceptable Payment Frequencies** list box.

Acceptable Payment Frequencies: If you select a payment frequency and select the Filter Payment Frequencies check box, the payment frequency is available when users create or reschedule scheduled payments. If you select a payment frequency and clear the Filter Payment Frequencies check box, all payment frequencies are available when users create or reschedule scheduled payments.

Select None: Clears all selected items in the list.

Select All: Selects all items in the list.

Tip: To select multiple sequential payment or credit card types, press and hold the **Shift** key and then click the first and last sequential payment or credit card type. To select multiple non-sequential payment or credit card types, press and hold the **Ctrl** key and then click each individual payment or credit card type.

Credit Cards Permission

Use the Credit Cards permission to specify the settings for credit cards. For more information, see Add a Credit Card.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Scheduled Payments > Credit Cards.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify whether the user can include the credit card security code and whether your organization requires the security code. Enable the permission for a scope and then specify the settings.

Allow entry of credit card security code: If selected, the user can include the credit card security code when adding a credit card payment to an account.

Require credit card security code: If selected, your organization requires the user to provide the credit card security code when adding a credit card payment to an account.

Allow entry of credit card postal code: If selected, the user can include the credit card postal code when adding a credit card payment to an account.

Require credit card postal code: If selected, your organization requires the user to provide the credit card postal code when adding a credit card payment to an account.

Allow entry of credit card street 1: If selected, the user can include the credit card street address line 1 when adding a credit card payment to an account.

Require credit card street 1: If selected, your organization requires the user to provide the credit card street address line 1 when adding a credit card payment to an account.

Mask data when typing credit card account number: If selected, when the user types the credit card account number, the system replaces the typed characters with periods.

Require dual entry of credit card account number for validation: If selected, the user must type the credit card account number twice for validation purposes. If the numbers don't match, an error message displays.

Direct Debit Permission

Use the Direct Debit permission to specify the settings for Direct Debits. For more information, see Add a Direct Debit Account.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Scheduled Payments > Direct Debit.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify the threshold for scheduling first and subsequent Direct Debit payments. Enable the permission for a scope and then specify the settings.

Lead-time Days threshold for first payment: Minimum number of days from the current date that a user can schedule the first Direct Debit payment. For example, if the current date is "April 28, 2016" and the threshold is "7," the user cannot schedule the first payment until May 5, 2016 or later.

Direct Debit Client Representment Rules Permission

Use the Direct Debit Client Representment Rules permission to specify the rules for representing returned Direct Debit payments.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Scheduled Payments > Direct Debit Client Representment Rules.

Scope

This permission is available for the following scopes:

- Client
- Client Group
- Business Class

Policy

The policy allows your organization to specify the rules for representing returned payments. Enable the permission for a scope and then specify the settings.

Allow payments to be represented: If selected, users can represent returned payments.

Represent in Care: If selected, users can represent returned payments for accounts that are in care.

Minimum amount to represent: Minimum payment amount required to represent.

Days in future to represent on processing a return: Number of days after processing the error file to schedule the payment for representment.

Maximum days from return to represent: Maximum number of days after which a user can no longer represent the payment. The calculation starts from the returned payment receipt date.

Direct Debit Guarantee Entity Name Permission

Use the Direct Debit Guarantee Entity Name permission to specify the entity who is guaranteeing Direct Debits.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Scheduled Payments > Direct Debit Guarantee Entity Name.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify the entity who is guaranteeing Direct Debits. Enable the permission for a scope and then specify the entity.

Entity used in Direct Debit Guarantee: Name of the entity who is guaranteeing Direct Debits..

Scheduled Payments - User Policy Permission

Use the User Policy permission to specify the actions a user can take when scheduling or modifying a payment on an account. For more information, Arrangements.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Scheduled Payments > User Policy.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

The policy allows your organization to specify the actions a user can take when creating or modifying scheduled payments. Enable the permission for a scope and then specify the settings.

Allow user to bypass business rules when scheduling or editing payments: If selected, the user can bypass the payment business rules.

Allow user to suppress surcharge assessment on new arrangements: If selected, the user can remove the surcharge on a new arrangement.

Allow Updating of Scheduled Payments entered by Other Users: If selected, allows the user to modify scheduled payments that other users created.

Allow User to Update Their Own Scheduled Payments: If selected, allows the user to modify scheduled payments that the user created.

Allow Updating of Scheduled Payments Hold Flag: If selected, allows the user to place a scheduled payment on hold and release the hold.

Maximum Total Number of Scheduled Payments (0 = unlimited): Maximum number of scheduled payments allowed. If blank or zero, there is no maximum limit.

Allow saving Payment Instrument to Wallet: If selected, allows the user to save a payment instrument to a customer's wallet.

Allow deleting Payment Instrument from Wallet: If selected, allows the user to delete a payment instrument from a customer's wallet.

Allow lookup of previously used Payment Instruments not saved in Wallet: If selected, allows the user to look up payment instruments previously used on an account and not saved to a customer's wallet.

% Allowed Below Minimum: Percent below the minimum settlement amount allowed before requiring supervisor approval.

Update User Date 1 Permission

Use the Update User Date 1 permission to specify whether users can modify dates for the user-defined date 1 box. For more information, see View or Modify Account Dates.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Update User Date 1.

Scope

This permission is available for all scopes.

Policy

N/A

Update User Date 2 Permission

Use the Update User Date 2 permission to specify whether users can modify dates for the user-defined date 2 box. For more information, see View or Modify Account Dates.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Update User Date 2.

Scope

This permission is available for all scopes.

Policy

N/A

Update User Date 3 Permission

Use the Update User Date 3 permission to specify whether users can modify dates for the user-defined date 3 box. For more information, see View or Modify Account Dates.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Update User Date 3.

Scope

This permission is available for all scopes.

Policy

N/A

Warnings Settings

Warnings Settings

Use the Warnings settings to specify permissions and policies for displaying state and time zone warnings.

Display State Warnings Permission

Use the Display State Warnings permission to specify whether state warnings display when viewing an account for a state with restrictions. For more information, see View Account Warnings.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Warnings > 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 a warning displays when viewing an account during a restricted time period. Latitude calculates the time based on the postal code associated to the account. For more information, see View Account Warnings.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Warnings > Display Time Zone Warnings.

Scope

This permission is available for all scopes.

Policy

N/A

Warning Dialog Permission

Use the Warning Dialog permission to specify whether warnings appear automatically. For more information, see View Account Warnings.

Location

In the Navigation pane, click Applications > Liquid Latitude > Account Data > Warnings > Warning Dialog Policy.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

The policy allows your organization to specify under what conditions warning messages display. Enable the permission for a scope and then specify the condition.

Display Behavior: Condition under which warnings display automatically. Valid values are:

- Always display warning dialog: Displays warning messages even when no warnings exist for the account.
- **Only display warning dialog if warnings exist:** Displays warning messages when warnings exist for the account.

Note: If your organization disabled the permission or didn't configure it, Latitude doesn't display warning messages automatically when an account displays. However, if warnings exist for an account, users can click an option in the menu bar to display the warning messages.

Applicable Processes and Stages Permission

Use the Applicable Processes and Stages permission to select the processes and stages available to users. For more information, see <u>Process Stages</u>.

Location

In the Navigation pane, click Applications > Liquid Latitude > Process Orchestration > Applicable Processes and Stages.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Business Class
- Client Group
- Client

Policy

The policy allows your organization to specify which processes are available to users and which stages within that process that users can move accounts through. Enable the permission for a scope and then select the allowed processes and stages. If you select a process and stage, it's available to users.

Conditions: If you select a condition (process and stage), it's available to users.

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

Dialer Functionality Settings

Dialer Functionality Settings

Use the Dialer Functionality settings to specify permissions and policies for the Dialer Agent Interface.

Dialer Permission

Use the Dialer permission to specify whether to display the PureConnect client (for PureConnect integrations) or the Genesys Cloud client (for Genesys Cloud integrations).

Location

In the Navigation pane, click Applications > Liquid Latitude > Dialer Functionality > Dialer.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

The policy allows your organization to specify the settings for displaying PureConnect client (for PureConnect integrations) or the Genesys Cloud client (for Genesys Cloud integrations). Enable the permission for a scope and then specify the settings.

Type of Dialer: Type of dialer to use with Latitude.

Server Name: Name of the dialer server.

Dialer Client URL: Web address for the dialer client.

Dialer API: Web address for the Genesys Cloud API. (For Genesys Cloud integrations only.)

Token: Client ID and **Client Secret** values for the Latitude API OAuth Client that your organization created in Genesys Cloud, separated by the pipe character. For example, 65b7aTR3432|4LMixz841ab. (For Genesys Cloud integrations only.)

User can make manual call through dialer client: If selected, the user can place calls manually through the Genesys Cloud client. (For Genesys Cloud integrations only.)

Default Result Code: Result code to use when the agent selects a disposition code that doesn't map to a Latitude result code.

Disposition Code Mappings: Allows you to map disposition codes from your dialer server to result codes in Latitude. For more information about mapping codes, see <u>Map a Disposition Code to a Result Code</u>.

Disposition Code: Dialer server disposition code to map to the Latitude result code.

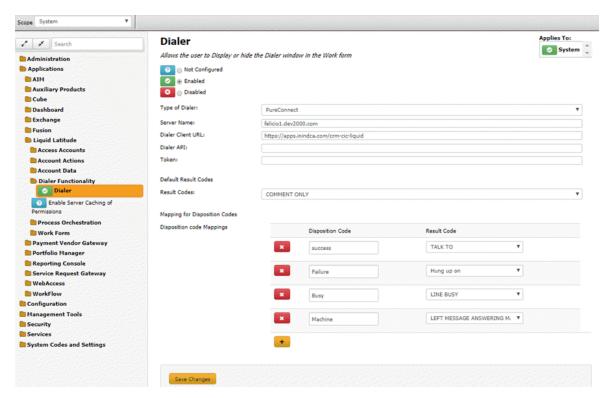
Result Code: Latitude result code to map to the dialer disposition code.

Map a Disposition Code to a Result Code

Use the **Dialer** panel to map disposition codes from your Dialer server to result codes in Latitude.

To map a disposition code to a result code

1. In the Navigation pane, click Applications > Liquid Latitude > Dialer Functionality > Dialer.



Disposition Code: Dialer server disposition code to map to the Latitude result code.

Result Code: Latitude result code to map to the Dialer server disposition code.

Note: This code must match exactly to an existing disposition that you mapped in the Script in Interaction Administrator.

- 2. Click the plus sign (+). A blank row appears in the data grid.
- 3. Complete the information and then click **Save Changes**.

Note: To modify a mapping, type or select a new value and then save it. To delete a mapping, click the Delete icon.

Enable Server Caching of Permissions

Use the Enable Server Caching of Permissions permission to turn on or off the caching of permissions. When you turn on caching, the system attempts to retrieve permission settings from the cache. If the permission setting isn't in the cache, the system retrieves the permission setting from the database and stores it in the cache for future retrieval. When a user modifies a permission, the system clears the cache. When you turn off caching, the system retrieves permission settings from the database.

Location

In the Navigation pane, click Applications > Liquid Latitude > Enable Server Caching of Permissions.

Scope

This permission is available for all scopes.

Policy

N/A

Work Form Settings

Work Form Settings

Use the Work Form settings to specify which components can display.

Anchor Permission

Use the Anchor permission to specify the default account anchor to display when viewing an account. For more information, see Delinquency or Recovery Anchor.

Location

In the Navigation pane, click Applications > Liquid Latitude > Work Form > Anchor.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify the default anchor to display (for example, delinquency or recovery). Enable the permission for a scope and then specify the default anchor to display.

Anchor Follow-up Data Permission

Use the Anchor Follow-up Data permission to specify the follow-up data to display when viewing an account.

Location

In the Navigation pane, click Applications > Liquid Latitude > Work Form > Anchor Followup Data.

Scope

This permission is available for the following scopes:

- System
- Business Class
- Customer Group
- Customer

Policy

The policy allows your organization to specify the follow-up data to show when displaying an account. Enable the permission for a scope and then specify the follow-up data to display.

Reference Panels Permission

Use the Reference Panels permission to specify the reference panels to display, and to specify which panel is the default panel. All users can display the **Notes** and **Interactions** panels. For more information, see Reference Panels.

Location

In the Navigation pane, click Applications > Liquid Latitude > Work Form > Reference Panels.

Scope

This permission is available for all scopes.

Policy

The policy allows your organization to specify the reference panels that are available to users. Enable the permission for a scope and then specify the panels to display.

Default Panel: Default panel to display.

Available Panels: If you select a reference panel, users can view it.

Select None: Clears all selected items in the list.

Select All: Selects all items in the list.

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

Task Panels Permission

Use the Task Panels permission to specify which task panels that users can view, and which task panel is the default panel to display. For more information, see Task Panels.

Location

In the Navigation pane, click Applications > Liquid Latitude > Work Form > Task Panels.

Scope

This permission is available for all scopes.

Policy

The policy allows your organization to specify the task panels that are available to users. Enable the permission for a scope and then specify the task panels to display.

Default Task Panel: Default task panel to display.

Available Task Panels: If you select a task panel, users can view it.

Select None: Clears all selected items in the list.

Select All: Selects all items in the list.

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

Time on Account Configuration Permission

Use the Time on Account Configuration permission to specify the caution and warning thresholds for time spent on an account, and the duration of an open interaction. When the time reaches the specified

thresholds, the background color of the **Time on Account** indicator in the status bar and on the **Since** column in the **Open Interactions** panel changes color accordingly. For more information, see <u>Work Form</u> <u>Overview</u> and View Open Interactions.

Location

In the Navigation pane, click Applications > Liquid Latitude > Work Form > Time on Account Configuration.

Scope

This permission is available for all scopes.

Policy

These policies allow your organization to specify the thresholds for caution and warning zones. Enable the permission for a scope and then specify the thresholds for each zone.

Caution Color Boundary: Threshold (in hours, minutes, and seconds) for displaying a yellow background on the **Time on Account** indicator in the status bar and on the **Since** column in the **Open Interactions** panel.

Warning Color Boundary: Threshold (in hours, minutes, and seconds) for displaying a red background on the **Time on Account** indicator in the status bar and on the **Since** column in the **Open Interactions** panel.

Payment Vendor Gateway Settings

Payment Vendor Gateway Settings

Use the Payment Vendor Gateway settings to specify permissions and policies for Payment Vendor Gateway (PVG). PVG allows users to request payment transaction processing from vendors over a secure connection.

Access Batch Wizard Permission

Use the Access Batch Wizard permission to specify whether users can use the Batch Processor. For more information, see Process a Payment Batch.

Location

In the Navigation pane, click Applications > Payment Vendor Gateway > Access Batch Wizard.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

ACH Vendor Information Permission

Use the ACH Vendor Information permission to specify a vendor's settings for processing ACH payment transactions using Payment Vendor Gateway (PVG).

Location

In the Navigation pane, click Applications > Payment Vendor Gateway > ACH Vendor Information.

Scope

This permission is available for the following scopes:

- System
- Business Class
- Client Group
- Client

Policy

The policy allows your organization to specify settings for ACH payment processing through a payment vendor using PVG. Enable the permission for a scope and then specify the settings.

Vendor Info Parameter 1: Credentials that the payment vendor provided to allow you to process ACH payment transactions. The format is:

securityToken=<principalCredential>|securityTokenSurcharge=<surchargeCredential>|mode=principal

Vendor Info Parameter 2: PINs that the payment vendor provided to allow you to process ACH payment transactions. The format is:

pin=<principalCredentialPIN>|pinSurcharge=<surchargeCredentialPIN>

Note: Replace the text within the less than and greater than signs (<>) with the appropriate values. If you are sending surcharges with the principal as a single transaction, specify the "surchargeCredential" and "surchargeCredentialPIN."

Send the surcharge as a separate transaction?: If selected, Latitude sends surcharges as separate transactions and records two transactions on the account.

Note: If you are sending surcharges as separate transactions, specify the **Vendor Surcharge Info Parameter 1** and **Vendor Surcharge Info Parameter 1** values. Replace the text within the less than and greater than signs (<>) with the appropriate values.

Vendor Surcharge Info Parameter 1: Credential that the payment vendor provided to allow you to process ACH surcharge transactions separately from the principal. The format is:

securityTokenSurcharge<<surchargeCredential>|mode=surcharge

Vendor Surcharge Info Parameter 2: PIN that the payment vendor provided to allow you to process ACH surcharge transactions separately from the principal. The format is:

pinSurcharge=<surchargeCredentialPIN>

Batch Processor System Permission

Use the Batch Processor System permission to specify system settings for the Batch Processor that creates batches of payments for each payment type. The Batch Processor posts transactions to the affected accounts.

Location

In the Navigation pane, click Applications > Payment Vendor Gateway > Batch Processor System.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify the URL for the Batch Processor. Enable the permission for a scope and then specify the settings.

URL for Batch Job Processor System: URL to display the Batch Processor in Latitude.

Credit Card Vendor Information Permission

Use the Credit Card Vendor Information permission to specify a vendor's settings for processing credit card payment transactions using Payment Vendor Gateway (PVG).

Location

In the Navigation pane, click Applications > Payment Vendor Gateway > Credit Card Vendor Information.

Scope

This permission is available for the following scopes:

- System
- Business Class
- Client Group
- Client

Policy

The policy allows your organization to specify settings for credit card payment processing through a payment vendor using PVG. Enable the permission for a scope and then specify the settings.

Vendor Info Parameter 1: Credentials that the payment vendor provided to allow you to process credit card payment transactions. The format is:

securityToken=<principalCredential>|securityTokenSurcharge=<surchargeCredential>|mode=principal

Vendor Info Parameter 2: PINs that the payment vendor provided to allow you to process credit card payment transactions. The format is:

pin=<principalCredentialPIN>|pinSurcharge=<surchargeCredentialPIN>

Note: Replace the text within the less than and greater than signs (<>) with the appropriate values. If you are sending surcharges with the principal as a single transaction, specify the "surchargeCredential" and "surchargeCredentialPIN."

Send the surcharge as a separate transaction?: If selected, Latitude sends surcharges as separate transactions and records two transactions on the account.

Note: If you are sending surcharges as separate transactions, specify the Vendor Surcharge Info Parameter 1 and Vendor Surcharge Info Parameter 1 values. Replace the text within the less than and greater than signs (<>) with the appropriate values.

Vendor Surcharge Info Parameter 1: Credential that the payment vendor provided to allow you to process credit card surcharge transactions separately from the principal. The format is:

securityTokenSurcharge=<surchargeCredential>|mode=surcharge

Vendor Surcharge Info Parameter 2: PIN that the payment vendor provided to allow you to process credit card surcharge transactions separately from the principal. The format is:

pinSurcharge=<surchargeCredentialPIN>

Customer Information Profiles Permission

Use the Customer Information Profiles permission to specify the profiles to use to send information to Payment Vendor Gateway (PVG) for the payment processing vendor's use.

Location

In the Navigation pane, click Applications > Payment Vendor Gateway > Customer Information Profiles.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify profiles to use to send information to PVG for the payment processing vendor's use. Enable the permission for a scope and then specify the settings.

Select the Customer Information Profile for Real Time Batch Credit Card Processing: Profile to use when processing batches of credit card payments.

Select the Customer Information Profile for Batch ACH Processing: Profile to use when processing batches of ACH payments.

Select the Customer Information Profile for Batch Paper Draft Processing: Profile to use when processing batches of paper draft payments.

Enable Payment Vendor Gateway Permission

Use the Enable Payment Vendor Gateway permission to allow your organization to use Payment Vendor Gateway (PVG) for sending transactions to payment processing 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 Navigation pane, click Applications > Payment Vendor Gateway > Enable Latitude Payment Vendor Gateway.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify Payment Vendor Gateway settings. Enable the permission for a scope and then specify the settings.

URL for Payment Vendor Gateway: URL address for PVG. 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 Real Time and Batch Credit Card Processing: Default vendor your company uses for credit card processing. Configure the <u>Credit Card Vendor Information permission</u> also.

Use vendor interface to capture credit card information: If selected, Latitude presents the vendor's interface to the user to collect credit card information.

Use alternative method for surcharge transaction: If selected, Latitude uses another method for surcharge transactions.

Vendor manages payment arrangements: If selected, the vendor manages payment arrangements.

Select the Vendor for Batch ACH Processing: Default vendor your company uses for ACH processing. Configure the <u>ACH Vendor Information permission</u> also.

Use vendor interface to capture bank account information: If selected, Latitude presents the vendor's interface to the user to collect bank account information.

Use alternative method for surcharge transaction: If selected, Latitude uses another method for surcharge transactions.

Vendor manages payment arrangements: If selected, the vendor manages payment arrangements.

Select the Vendor for Batch Paper Draft Processing: Default vendor your company uses for paper draft processing. Configure the <u>Paper Draft Vendor Information permission</u> also.

Paper Draft Vendor Information Permission

Use the Paper Draft Vendor Information permission to specify a vendor's settings for processing paper draft payment transactions using Payment Vendor Gateway (PVG).

Location

In the Navigation pane, click Applications > Payment Vendor Gateway > Paper Draft Vendor Information.

Scope

This permission is available for the following scopes:

• System

- Business Class
- Client Group
- Client

Policy

The policy allows your organization to specify settings for paper draft payment processing through a payment vendor using PVG. Enable the permission for a scope and then specify the settings.

Vendor Info Parameter 1: Credentials that the payment vendor provided to allow you to process paper draft payment transactions. The format is:

securityToken=<principalCredential>|securityTokenSurcharge=<surchargeCredential>|mode=prin cipal

Vendor Info Parameter 2: PINs that the payment vendor provided to allow you to process paper draft payment transactions. The format is:

pin=<principalCredentialPIN>|pinSurcharge=<surchargeCredentialPIN>

Note: Replace the text within the less than and greater than signs (<>) with the appropriate values. If you are sending surcharges with the principal as a single transaction, specify the "surchargeCredential" and "surchargeCredentialPIN."

Send the surcharge as a separate transaction?: If selected, Latitude sends surcharges as separate transactions and records two transactions on the account.

Note: If you are sending surcharges as separate transactions, specify the **Vendor Surcharge Info Parameter 1** and **Vendor Surcharge Info Parameter 1** values. Replace the text within the less than and greater than signs (<>) with the appropriate values.

Vendor Surcharge Info Parameter 1: Credential that the payment vendor provided to allow you to process paper draft surcharge transactions separately from the principal. The format is:

securityTokenSurcharge=<surchargeCredential>|mode=surcharge

Vendor Surcharge Info Parameter 2: PIN that the payment vendor provided to allow you to process paper draft surcharge transactions separately from the principal. The format is:

pinSurcharge=<surchargeCredentialPIN>

Portfolio Manager Settings

Portfolio Manager Settings

Use the Portfolio Manager settings to specify permissions and policies for Portfolio Manager.

Access Portfolio Manager Permission

Use the Access Portfolio Manager permission to specify whether users can open Portfolio Manager.

Location

In the Navigation pane, click Applications > Portfolio Manager > Access Portfolio Manager.

Scope

This permission is available for all scopes.

Policy

N/A

Access Reports Permission

Use the Access Reports permission to specify whether users can display reports in Portfolio Manager.

Location

In the Navigation pane, click Applications > Portfolio Manager > 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 Navigation pane, click Applications > Portfolio Manager > 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 Navigation pane, click Applications > Portfolio Manager > Add/Edit/Delete Buyers.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

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 Navigation pane, click Applications > Portfolio Manager > 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 Navigation pane, click Applications > Portfolio Manager > 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 Navigation pane, click Applications > Portfolio Manager > 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 Navigation pane, click Applications > Portfolio Manager > 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 Navigation pane, click Applications > Portfolio Manager > 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 Navigation pane, click Applications > Portfolio Manager > 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 Navigation pane, click Applications > Portfolio Manager > View Investors.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

View Purchases Permission

Use the View Purchases permission to specify whether users can view purchases in Portfolio Manager.

Location

In the Navigation pane, click Applications > Portfolio Manager > 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 Navigation pane, click Applications > Portfolio Manager > 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 Navigation pane, click Applications > Portfolio Manager > 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 Navigation pane, click Applications > Portfolio Manager > View Sellers.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Reporting Console Settings

Reporting Console Settings

Use the Reporting Console permissions and policies to specify settings for Reporting Console.

Access Reporting Console Permission

Use the Access Reporting Console permission to specify whether users can open Reporting Console.

Location

In the Navigation pane, click Applications > Reporting Console > 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 manage reports in Reporting Console. The actions include: exporting, importing, deleting, organizing, and renaming reports.

Location

In the Navigation pane, click Applications > Reporting Console > 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 reports in Reporting Console.

Location

In the **Navigation** pane, click **Applications** > **Reporting Console** > **View Reports**.

Scope

This permission is available for the following scopes:

- System
- Role
- User

• Branch

Policy

The policy allows your organization to specify what users can do in Reporting Console. Enable the permission for a scope and then select the Reporting Console permissions.

Permit the user to create snapshots of reports they have run: If selected, the user can create snapshots of reports the user runs.

Permit the user to view snapshots of reports created by other users: If selected, the user can view snapshots of reports other users created.

Restrict user to only execute the following reports: If selected, the user can run the specified reports only.

Reports: If you select a report, users can run it.

Select None: Clears all selected items in the list.

Select All: Selects all items in the list.

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

Service Request Gateway Settings

Service Request Gateway Settings

Use the Service Request Gateway settings to specify permissions and policies for Service Request Gateway (SRG). SRG allows users to request services from a service vendor, such as a credit reporting vendor, over a secure connection.

Access Quota Management Application Permission

Use the Access Quota Management Application permission to specify whether users can open the Quota Management program to define user and customer quotas.

Location

In the Navigation pane, click Applications > Quota Management > Access Quota Management Application.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

The policy allows your organization to specify whether users can open the Quota Management program. Enable the permission for a scope and then specify the overrides.

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 modify a user's quota allotment for the current period only.

Allow the user to temporarily add to or remove from a customer's quota allotment for any product. Only valid for current period: If selected, allows the user to modify a customer's quota allotment for the current period only.

Allow the user to view the audit of changes to quota allotments: If selected, allows the user to view the audit trail that shows changes to quota allotments.

Access SRG Module Installer Permission

Use the Access SRG Module Installer permission to specify whether users can use the SRG Module Installer to configure Service Request Gateway (SRG).

Location

In the Navigation pane, click Applications > Service Request Gateway > Access SRG Module Installer.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Credit Report Requests Settings

Credit Report Requests Settings

Use the Credit Report Requests settings to specify permissions and policies for credit report requests.

Access the Credit Report Request Wizard Permission

Use the Access the Credit Report Request Wizard permission to specify whether users can use the Credit Report Request Wizard.

Location

In the Navigation pane, click Applications > Service Request Gateway > Credit Report Requests > 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.

Location

In the Navigation pane, click Applications > Service Request Gateway > Credit Report Requests > Allow Viewing of Credit Reports.

Scope

This permission is available for the following scopes:

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

Policy

N/A

Credit Report Requests Settings Permission

Use the Credit Report Requests Settings permission to configure general settings for credit report requests.

Location

In the Navigation pane, click Applications > Service Request Gateway > Credit Report Requests > Credit Report Requests Settings.

Scope

This permission is available for the System scope only.

Policy

The 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 user is prompted to wait or continue working: Number of seconds to wait after requesting a report before prompting the user to continue waiting 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 for the user to wait before requesting another report.

Apply "minimum number of days" policy only to credit reports from same vendor: If selected, the "minimum number of days" policy applies to credit reports from the same vendor only.

Minimum balance on account to request credit report: Minimum account balance required for the user to request a credit report.

Maximum number of credit report requests per account: Maximum number of credit report requests allowed for each account.

Enable "One Off" Credit Report Requests Permission

Use the Enable "One Off" Credit Report Requests permission to specify whether users can request a single credit report.

Location

In the Navigation pane, click Applications > Service Request Gateway > Credit Report Requests > Enable "One Off" Credit Report Requests.

Scope

This permission is available for the following scopes:

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

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 general settings for credit report requests.

Location

In the Navigation pane, click Applications > Service Request Gateway > Credit Report Requests > Enable Overrides to Credit Report Request Settings.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

The policy allows your organization to override the general settings for credit report requests. Enable the permission for a scope and then specify the overrides.

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 for the user to wait before requesting 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 for each account.

Enable Service Request Gateway Permission

Use the Enable Service Request Gateway permission to specify whether your company can use Service Request Gateway (SRG) to request 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 Navigation pane, click Applications > Service Request Gateway > 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 where your organization installed SRG. Enable the permission for a scope and then provide these values for each workstation where your organization installed SRG.

URL of the Service Request Gateway (SRG): 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.

Web Access Settings

Web Access Settings

Use the Web Access settings to specify permissions and policies for Web Access.

Account View Client Code Override Policy Permission

Use the Account View Client Code Override Policy permission to specify the report to display when viewing an account in Web Access. If your organization specified a default report in the <u>Website User</u> <u>Policy Permission</u> for a user or role, the report specified in this permission displays instead.

Location

In the Navigation pane, click Applications > Web Access > Account View Client Code Override Policy.

Scope

This permission is available for the following scopes:

- System
- Business Class
- Client Group
- Client

Policy

The policy allows your organization to specify the default report to display when viewing an account. Enable the permission for a scope and then specify the report.

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 Navigation pane, click Applications > Web Access > Website System Policy.

Scope

This permission is available for the System scope only.

Policy

The 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 Client Access Policy Permission

Use the Website User Client Access Policy permission to specify the client and client groups available to Web Access users.

Location

In the Navigation pane, click Applications > Web Access > Website User Client Access Policy.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

The policy allows your organization to specify the client and client groups available to Web Access users. Enable the permission for a scope and then select the client groups and clients.

Client Groups: If you select a client group, it's available to Web Access users.

Clients: If you select a client, it's available to Web Access users.

Select None: Clears all selected items in the list.

Select All: Selects all items in the list.

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

Website User Policy Permission

Use the Website User Policy permission to specify the Web Access features available to a user or role.

Location

In the Navigation pane, click Applications > Web Access > Website User Policy.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

The 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 Customers: 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 Customer Accounts: If selected, the user can add notes to accounts.

User Can Send a Message to Admin regarding Customer 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 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 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, Web Access 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 permission.

Echo email sent to user when they Add a Note or Send any Message: If selected, Web Access 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.

Choose the report used for the Account View: Default report to display when viewing an account. If your organization enabled the Account View Customer Code Override Policy permission, the default report specified for that permission displays instead of the report specified here.

Choose the report used to return Search Results: Default report to display when viewing search results.

Reports: If you select a report, it's available to Web Access users.

Select None: Clears all selected items in the list.

Select All: Selects all items in the list.

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

WorkFlow Settings

WorkFlow Settings

Use the WorkFlow settings to specify permissions and policies for WorkFlow.

Manually Pause WorkFlow Permission

Use the Manually Pause WorkFlow permission to specify whether users can pause a workflow that is running on an account in WorkFlow.

Location

In the Navigation pane, click Applications > WorkFlow > Manually Pause WorkFlow.

Scope

This permission is available for the following scopes:

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

Policy

N/A

Manually Raise Event Permission

Use the Manually Raise Event permission to specify whether users can raise an event on an account in WorkFlow.

Location

In the Navigation pane, click Applications > WorkFlow > Manually Raise Event.

Scope

This permission is available for the following scopes:

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

Policy

N/A

Manually Release WorkFlow Permission

Use the Manually Release WorkFlow permission to specify whether users can release a parent workflow in WorkFlow that is waiting on a child workflow to complete, which allows the parent workflow to continue.

In the Navigation pane, click Applications > WorkFlow > Manually Release WorkFlow.

Scope

This permission is available for the following scopes:

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

Policy

N/A

Manually Resume WorkFlow Permission

Use the Manually Resume WorkFlow permission to specify whether users can resume a paused workflow for an account in WorkFlow.

Location

In the Navigation pane, click Applications > WorkFlow > Manually Resume WorkFlow.

Scope

This permission is available for the following scopes:

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

Policy

N/A

Manually Start WorkFlow Permission

Use the Manually Start WorkFlow permission to specify whether users can start a workflow on an account in WorkFlow.

In the Navigation pane, click Applications > WorkFlow > Manually Start WorkFlow.

Scope

This permission is available for the following scopes:

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

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 an account in WorkFlow.

Location

In the Navigation pane, click Applications > WorkFlow > Manually Stop WorkFlow.

Scope

This permission is available for the following scopes:

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

Policy

N/A

WorkFlow Engine Settings Permission

Use the WorkFlow Engine Settings permission to specify settings for WorkFlow Engine.

In the Navigation pane, click Applications > WorkFlow > Latitude WorkFlow Engine Settings.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify settings for WorkFlow Engine. Enable the permission for a scope and then specify the settings.

Execution Duration [min]: Maximum number of minutes WorkFlow Engine continues to run in a single session. WorkFlow Engine processes events and activities until the event queue is empty or it reaches the time limit set here.

Action Activities: Maximum number of accounts 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 WorkFlow Engine can process when running condition activities.

Query Activities: Maximum number of accounts WorkFlow Engine can process when running query activities.

Switch Activities: Maximum number of accounts WorkFlow Engine can process when running switch activities.

Email Address: Email address of the person who is monitoring WorkFlow Engine activity.

Configuration Settings

Configuration Settings

Use the Configuration settings to specify configuration permissions and policies for Latitude.

Delinquency Aging Bucket Labels Permission

Use the Delinquency Aging Bucket Labels permission to specify the labels to display for the delinquency aging buckets. For more information, see Delinquency Card.

Location

In the Navigation pane, click Configuration > Delinquency Aging Bucket Labels.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify the labels to display for the delinquency aging buckets. Enable the permission for a scope and then specify the label names and their values.

Payment Processing Settings

Payment Processing Settings

Use the Payment Processing settings to specify permissions and policies for payment methods and payment spreads.

Configuration for Handling Broken Promises Permission

Use the Configuration for Handling Broken Promises permission to specify the status and queue level to assign to accounts when customers break a promise.

Location

In the Navigation pane, click Configuration > Payment Processing > Configuration for Handling Broken Promises.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify the status and queue level to assign to accounts when customers break a promise. Enable the permission for a scope and then specify the settings.

Change Status and Qlevel: If selected, the system changes the account status and queue level when customers break promises.

Change Status to: Status to assign to accounts when processing broken promises.

Change Qlevel to: Queue level to assign to accounts when processing broken promises.

Configuration for Handling NSFs/Reversals Permission

Use the Configuration for Handling NSFs/Reversals permission to specify the status and queue level to assign to accounts when importing NSF or payment reversals using Exchange. This permission has no effect on manual payment entries.

Location

In the Navigation pane, click Configuration > Payment Processing > Configuration for Handling NSFs/Reversals.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify the status and queue level to assign to accounts when importing NSF or payment reversals using Exchange. Enable the permission for a scope and then specify the settings.

Change Status and Qlevel: If selected, the system changes the account status and queue level when importing accounts with NSF or payment reversals.

Change Status to: Status to assign to accounts when processing NSF or payment reversals.

Change Qlevel to: Queue level to assign to accounts when processing NSF or payment reversals.

Notes:

- The system does not change the queue level for accounts assigned to queue level "875."
- If you reopen a closed account that is linked and is not the link driver, the system changes the queue level from "998" to "875."

Change the status of future arrangements: If selected, the system assigns the specified status to future payment arrangements for accounts with NSF or payment reversals imported using Exchange.

Status for future arrangements: Status to assign to future payment arrangements for accounts with NSF or payment reversals imported using Exchange.

Deactivate Automatic Status and Queue Level Permission

Use the Deactivate Automatic Status and Queue Level permission to specify whether to prevent Latitude from changing the account status and queue levels automatically for arrangements. If you enable the permission, Collector doesn't change the account status and queue levels automatically. Instead, the account status and queue levels remain unchanged.

If you don't configure or enable the permission, Collector changes account status and queue levels automatically. If your organization configured the <u>Configuration for Handling Broken Promises</u> <u>permission</u> or the <u>Configuration for Handling NSFs/Reversals permission</u>, Collector changes account status and queue levels according to those configurations. Otherwise, Collector changes account status and queue levels according to the following table:

Account has	Account Status	Queue Level	Status of Non- driver Linked Accounts	Queue Level of Non-driver Linked Accounts
Promises	PPA	820	РРА	875
Broken promise	ACT	010	ACT	875
No promises remaining	ACT	013	ACT	875
Post-dated check	PDC	820	PDC	875
No post-dated checks remaining	ACT	011	ACT	875
Bounced check with post-dated checks remaining	NSF	012	ACT	875
Bounced check with no post-dated checks remaining	NSF	019	ACT	875
Post-dated credit card	PCC	820	PCC	875
No post-dated credit cards remaining	АСТ	010	ACT	875
Declined credit card	ACT	012	ACT	875
Declined credit with post-dated credit cards remaining	PCC	019	ACT	875

Location

In the Navigation pane, click Configuration > Payment Processing > Deactivate Automatic Status and Queue Level.

Scope

This permission is available for the System scope only.

Policy

N/A

Override Payment Spread Permission

Use the Override Payment Spread permission to specify whether users can override the configured payment spread for linked account arrangements and specify the order in which to apply payments. For more information about the configured payment spread, see <u>Payment Spread Permission</u>. For more information about overriding the configured payment spread, see Override a Payment Spread.

In the Navigation pane, click Configuration > Payment Processing > Override Payment Spread.

Scope

This permission is available for the following scopes:

- System
- Business Class
- Client Group
- Client

Policy

N/A

Payment Method Fee Schedule Permission

Use the Payment Method Fee Schedule permission to associate payment methods with fee schedules. For more information, see <u>Map a Payment Method to a Fee Schedule</u>.

Location

In the Navigation pane, click Configuration > Payment Processing > Payment Method Fee Schedule.

Scope

This permission is available for the following scopes:

- System
- Business Class
- Client Group
- Client

Policy

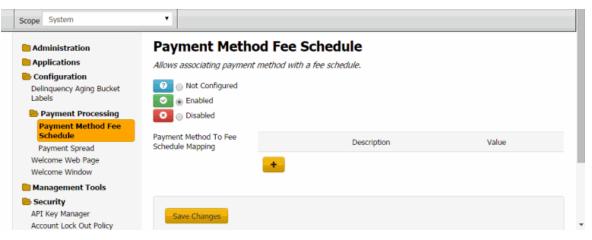
The policy allows your organization to associate payment methods to fee schedules. Enable the permission for a scope and then specify the mappings.

Map a Payment Method to a Fee Schedule

Use the **Payment Fee Schedule** panel to map a payment method to a fee schedule. You must have the appropriate permissions to map payment methods. For more information, see <u>Payment Method Fee</u> <u>Schedule Permission</u>.

To map a payment method to a fee schedule

1. In the Navigation pane, click Configuration > Payment Processing > Payment Method Fee Schedule.



Description: Unique code that identifies the fee schedule.

Value: Payment method (for example, credit card, check, money order) to associate to the fee schedule.

Note: The text you type in the **Value** box must match exactly to an existing payment method that your organization set up in the <u>Payment Methods</u> system code.

- 2. Click the plus sign (+). A blank row appears in the data grid.
- 3. Complete the information and then click **Save Changes**.

Note: To modify a mapping, type a new value in the appropriate box. To delete a mapping, click the Delete icon.

Payment Spread Permission

Use the Payment Spread permission to specify settings for how to spread payments across linked accounts.

Location

In the Navigation pane, click Configuration > Payment Processing > Payment Spread.

Scope

This permission is available for the following scopes:

- System
- Business Class
- Client Group
- Client

Policy

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

Payment Spread Method: Method for spreading payments across linked accounts. Valid values are:

- **Spread payments in order of the customer priority:** The system applies payments to the linked accounts based on how you prioritized the payments for each customer, starting with the highest priority. If you assigned the same priority to accounts, the system applies the payments proportionally.
- **Spread payments evenly over each account:** The system divides the payments and applies an equal amount to each linked account.
- **Spread payments according to their fees:** The system applies payments to the highest yielding linked account first, based on the balance and fee schedule.
- Spread payments over each account in the specified order: The system sorts the linked accounts according to the order you specify in the Sort Field 1 through Sort Field 4 and Sort Field 1 Order through Sort Field 4 Order policies in this permission and then applies the payments in that order.
- Spread payments over each account proportionally by current balance: The system applies
 payments to each linked account based on the amount owed in relation to the total balance of
 all the linked accounts listed. The system divides the amount owed for an account by the total
 balance for the combined accounts to get a percent. The system multiplies the payment by that
 percent and applies the result to that account.

For example, the total balance for the three accounts shown in the example is 3,217.47.

- **First Account:** Divide 250 (the balance for the first account) by 3,217.47 to get .08. If the payment amount is \$200, multiply 0.08 by 200 to get 16. The system applies \$16 of the \$200 payment to the first account.
- Second Account: Divide 967.47 (the balance for the second account) by 3,217.47 to get 0.30. Multiply 0.30 by 200 to get 60. The system applies \$60 of the \$200 payment to the second account.
- Third Account: Divide 2,000 (the balance for the third account) by 3,217.47 to get 0.62. Multiply 0.62 by 200 to get 124. The system applies \$124 of the \$200 payment to the third account. 16 + 60 + 124 = 200.
- Spread payments in order of the Fee Schedule Bucket priority and then in the specified order: The system applies payments to the linked accounts according to the money bucket priory set for the fee schedule and the order you specify in the Sort Field 1 through Sort Field 4 and Sort Field 1 Order through Sort Field 4 Order policies in this permission. The system sorts the accounts according to the sort policies specified. The system applies the payment to the priority 1 bucket of the first account in the sorted list, until the balance in that bucket is zero or no funds remain to apply. If funds remain, the system applies the payment to the priority 1 bucket of the next account in the sorted list until the balance in that bucket is zero or no funds remain to apply. If funds remain after applying the payment to the priority 1 buckets for all the linked accounts, the system begins applying the remaining funds to the priority 2 buckets in the same manner. The system continues applying the payment until no funds remain to apply or all linked account balances are zero.

Sort Field 1: First field by which to sort accounts when applying payments.

Sort Field 1 Order: Order in which to sort the data in the field specified in Sort Field 1.

Sort Field 2: Second field by which to sort accounts when applying payments.

Sort Field 2 Order: Order in which to sort the data in the field specified in Sort Field 2.

Sort Field 3: Third field by which to sort accounts when applying payments.

Sort Field 3 Order: Order in which to sort the data in the field specified in Sort Field 3.

Sort Field 4: Fourth field by which to sort accounts when applying payments.

Sort Field 4 Order: Order in which to sort the data in the field specified in Sort Field 4.

Note: If you specify more than one sort field, the system sorts the accounts by the first field specified. Within that sort order, the system then sorts the accounts by the second field specified. The system continues sorting in this manner for any subsequent sort fields specified. After sorting the accounts, the system applies payments to the accounts beginning with the first account in the sorted list.

Prevent Multiple Account Access Permission

Use the Prevent Multiple Account Access permission to prevent users from accessing the same account simultaneously.

Location

In the Navigation pane, click Configuration > Prevent Multiple Account Access.

Scope

This permission is available for the System scope only.

Policy

N/A

SMTP Permission

Use the SMTP permission to specify Simple Mail Transfer Protocol (SMTP) settings for email messages.

Location

In the Navigation pane, click Configuration > SMTP.

Scope

This permission is available for the System scope only.

Policy

The 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 0, use the default SMTP port of 25. Otherwise, specify the port number to use.

Connect Using Secure Sockets Layer: If selected, connects to the SMTP server using Secure Sockets Layer (SSL).

Authentication: The options are:

- Anonymous (default) = No authentication
- Basic = Provide a user name and password and select SSL
- Integrated = Use Windows authentication

User Name and Password: If you selected Basic Authentication, specify the user name and password to use.

Sender Domain: Domain address used for email messages (for example, collections.com).

Timeout[sec]: Number of seconds to wait when sending an email message before displaying a time-out message.

Welcome Web Page Permission

Use the Welcome Web Page permission to specify settings for the webpage to display when logging on to Latitude. The address can point to a local HTML file or a hosted webpage. If using a hosted webpage, Latitude passes the database information and current user ID to the web server to permit displaying user-specific information.

Location

In the Navigation pane, click Configuration > Welcome Web Page.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

The policy allows your organization to specify the address 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: Address of the HTML resource to display as the background on the Latitude welcome page. You can specify a different path for each scope.

Pass user credentials to web server: If selected, Latitude passes credentials to the web server when displaying the webpage.

Welcome Window Permission

Use the Welcome Window permission to specify settings for the Welcome window to display when logging on to Latitude.

Location

In the **Navigation** pane, click **Configuration** > **Welcome Window**.

Scope

This permission is available for all scopes.

Policy

The 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 page using SSL.

Management Tool Settings

Management Tool Settings

Use the Management Tools settings to specify permissions and policies for management tools.

Accounting Settings

Accounting Settings

Use the Accounting settings to specify permissions and policies for the Invoices and Overpayment Manager programs.

Access Invoices Program Permission

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

Location

In the Navigation pane, click Management Tools > Accounting > Access Invoices Program.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Access Overpayment Manager Permission

Use the Access Overpayment Manager Program permission to specify whether users can open Overpayment Manager.

Location

In the Navigation pane, click Management Tools > Accounting > Access Overpayment Manager Program.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

- Business Class
- Client Group
- Client

Policy

The 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 this selection criteria (for viewing only): If selected, the user can select or clear the **Maximum Amount** and **Invoiced Only** check boxes in Overpayment Manager to display or hide overpaid transactions.

Allow refund/transfer of overpayments on uninvoiced payments: If selected, the user can refund or transfer overpayment amounts not invoiced yet.

Maximum amount of overpayment allowed for refund/transfer: Maximum amount users can refund or transfer.

Allow refund of PU overpayments to the customer: If selected, the user can create refund checks on overpayment amounts for PU (paid us) transaction types.

Allow refund of PA overpayments to the customer: If selected, the user can create refund checks on overpayment amounts for PA (paid agency) transaction types.

Allow refund of PC overpayments to the customer: If selected, the user can 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 customer: Time to wait before granting a refund. Latitude 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 customer: Minimum amount users can refund.

Allow transfer of PU overpayments to another account: If selected, the user can transfer funds on overpayment amounts for PU (paid us) transaction types.

Allow transfer of PA overpayments to another account: If selected, the user can transfer funds on overpayment amounts for PA (paid agency) transaction types.

Allow transfer of PC overpayments to another account: If selected, the user can 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. Latitude 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: Minimum amount users can transfer.

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

Enter AR Payments Permission

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

Location

In the Navigation pane, click Management Tools > Accounting > Enter AR Payments.

Scope

This permission is available for the following scopes:

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

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 using the Invoices program.

Location

In the Navigation pane, click Management Tools > Accounting > Enter Bank Transactions.

Scope

This permission is available for the following scopes:

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

Policy

Generate Invoices Permission

Use the Generate Invoices permission to specify whether users can create client invoices using the Invoices program.

Location

In the Navigation pane, click Management Tools > Accounting > Generate Invoices.

Scope

This permission is available for the following scopes:

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

Policy

N/A

Generate Statements Permission

Use the Generate Statements permission to specify whether users can create account statements using the Invoices program.

Location

In the Navigation pane, click Management Tools > Accounting > Generate Statements.

Scope

This permission is available for the following scopes:

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

Policy

Print Checks Permission

Use the Print Checks permission to specify whether users can print checks using the Invoices program.

Location

In the Navigation pane, click Management Tools > Accounting > Print Checks.

Scope

This permission is available for all scopes.

Policy

N/A

Access Credit Reporting Wizard Permission

Use the Access Credit Reporting Wizard permission to specify whether users can open the Credit Bureau Reporting Wizard to create a file to send to a credit bureau.

Location

In the Navigation pane, click Management Tools > Credit Reporting Wizard > Access Credit Reporting Wizard.

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 configure end-of-day processing tasks in Custodian.

Location

In the Navigation pane, click Management Tools > Custodian > Access Custodian Editor.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

Access Dialer Config Permission

Use the Access Dialer Config permission to specify whether users can open Dialer Configuration to create and modify dialer campaigns.

Location

In the Navigation pane, click Management Tools > Dialer Config > Access Dialer Config.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Access Goal Manager Permission

Use the Access Goal Manager permission to specify whether users can open Goals Manager to view statistics for collectors, supervisors, managers, and owners.

Location

In the Navigation pane, click Management Tools > Goals > Access Goals Manager.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Archive Settings

Archive Settings

Use the Archive settings to specify permissions and policies for archiving and restoring account data.

Access Archive/Restore Functionality Permission

Use the Access Archive/Restore Functionality permission to specify whether users can archive accounts and restore archived accounts.

Location

In the Navigation pane, click Management Tools > Archive > Access Archive/Restore Functionality.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

The 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 the Archive Configuration program.

Allow user to run Archive/Restore application: If selected, allows the user to run the Archive/Restore program.

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 Latitude can archive account data.

Location

In the Navigation pane, click Management Tools > Archive > Enable Archive of Account Data.

Scope

This permission is available for the System scope only.

Policy

The policy allows your organization to specify which archive processes are available. 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 that must pass before the user can archive the account.

Add note to account after it has been archived: If selected, Latitude adds a note to the account after archiving it.

Log archive operations to ArchiveHistory table: If selected, Latitude logs archive operations to the Archive History table.

Synchronize archive table schema before every archive/restore operation: If selected, Latitude synchronizes table schema before every archive or restore operation. If cleared, users synchronize the schema using the Archive Configuration tool.

Letter Console Settings

Letter Console Settings

Use the Letter Console settings to specify permissions and policies for Letter Console.

Access Letter Console Permission

Use the Access Letter Console permission to specify whether users can open Letter Console to print and modify letters.

Location

In the Navigation pane, click Management Tools > Letter Console > 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 Navigation pane, click Management Tools > Letter Console > Change Settings.

Scope

This permission is available for all scopes.

Policy

N/A

Create/Delete Permission

Use the Create/Delete permission to specify whether users can create and delete letters in Letter Console.

Location

In the Navigation pane, click Management Tools > Letter Console > Create/Delete.

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 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 letter templates using Word, 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 template, modify it, and then upload it back to Letter Console. For more information, see "Modify a Letter Template" in the Letter Console documentation.

Location

In the Navigation pane, click Management Tools > Letter Console > Merge Using Microsoft Word.

Scope

This permission is available for the following scopes:

- System
- Role
- User

Policy

N/A

Link Console Settings

Link Console Settings

Use the Link Console settings to specify permissions and policies for Link Console.

Access Link Console Permission

Use the Access Link Console permission to specify whether users can open Link Console to modify automatic account linking settings.

Location

In the Navigation pane, click Management Tools > Link Console > Access Link Console.

Scope

This permission is available for all scopes.

Policy

Link Accounts Permission

Use the Link Accounts permission to specify whether users can use Link Console to link accounts manually that belong to the same party.

Location

In the Navigation pane, click Management Tools > Link Console > Link Accounts.

Scope

This permission is available for all scopes.

Policy

N/A

Payment Entry Settings

Payment Entry Settings

Use the Payment Entry settings to specify permissions and policies for viewing and managing payments in Latitude Console. For more information, see the *Latitude Console* documentation.

Access Payment Entry Permission

Use the Access Payment Entry permission to specify whether users can open the **Payment Entry** window in Latitude Console.

Location

In the Navigation pane, click Management Tools > Payment Entry > Access Payment Entry.

Scope

This permission is available for all scopes.

Policy

The policy allows users to specify the settings for adding payments. 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 to closed accounts.

Warn when allowing payments to be entered on closed accounts: If selected, displays a warning when the user adds a payment to closed accounts.

Allow opening of other users batches: If selected, allows the user to open payment batches that other users created.

Allow adding payments to other users batches: If selected, allows the user to add payments to payment batches that other users 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 payment batches that other users created.

Allow editing of other users batches: If selected, allows the user to modify payment batches that other users created.

Allow deleting of other users batches: If selected, allows the user to delete payment batches that other users created.

Allow editing of other users batch items: If selected, allows the user to modify payment batch items that other users created.

Allow deleting of other users batch items: If selected, allows the user to delete payment batch items that other users created.

Remove Other Users Batch Locks Permission

Use the Remove Other Users Batch Locks permission to specify whether users can unlock payment batches that other users locked in Latitude Console.

Location

In the Navigation pane, click Management Tools > Payment Entry > Remove Other Users Batch Locks.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Query Designer Settings

Query Designer Settings

Use the Query Designer settings to specify permissions and policies for querying accounts.

User Restrictions by Conditions Permission (Account Analysis)

Use the User Restrictions by Conditions permission to restrict the accounts that the user can modify using Account Analysis.

Location

In the Navigation pane, click Management Tools > Query Designer > Account Analysis > User Restrictions by Conditions.

Scope

This permission is available for the following scopes:

• System

- Role
- User

Policy

N/A

The policy allows your organization to limit the accounts that the user can modify using the Account Analysis tool. Enable the permission for a scope and then specify the conditions.

Restrict Accounts that can be modified using conditions?: If selected, allows you to restrict the accounts that the user can modify using the Account Analysis tool.

Conditions: Conditions for which accounts the user cannot modify using the Account Analysis tool. You set conditions in the same way as when you use the Condition Builder tool.

Access Condition Builder Permission

Use the Access Condition Builder permission to specify whether users can open Condition Builder to maintain conditions for Query Designer. This permission is available for all scopes.

Location

In the Navigation pane, click Management Tools > Query Designer > Condition Builder > Access Condition Builder.

Scope

This permission is available for all scopes.

Policy

N/A

Access Custom Queue Manager Permission

Use the Access Custom Queue Manager permission to specify whether users can open Custom Queue Manager to maintain custom queues.

Location

In the Navigation pane, click Management Tools > Query Designer > Custom Queue Manager > Access Custom Queue Manager.

Scope

This permission is available for all scopes.

Policy

N/A

Access List Builder Permission

Use the Access List Builder permission to specify whether users can open List Builder to create dialer call lists from List Builder query results.

Location

In the Navigation pane, click Management Tools > Query Designer > List Builder > Access List Builder.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Access Management Suite Extension Wizard Permission

Use the Access Management Suite Extension Wizard permission to specify whether users can open the Management Suite Extension Wizard to create a query for accomplishing a specific task.

Location

In the Navigation pane, click Management Tools > Query Designer > Extension Wizard > Access Latitude Management Suite Extension Wizard.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

CBR Requester Settings

CBR Requester Settings

Use the CBR Requester settings to specify permissions and policies for Credit Report Requester.

Access CBR Requester Permission

Use the Access CBR Requester permission to specify whether users can open Credit Report Requester to request credit bureau reports.

In the Navigation pane, click Management Tools > Query Designer > CBR Requester > Access CBR Requester.

Scope

This permission is available for all scopes.

Policy

N/A

Services Settings

Services Settings

Use the Services settings to specify permissions for requesting credit bureau reports using Credit Report Requester.

Equifax DTEC Permission

Use the Equifax DTEC permission to specify whether users can request an Equifax DTEC (SSN) report using Credit Report Requester.

Location

In the Navigation pane, click Management Tools > Query Designer > CBR Requester > Services > 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 using Credit Report Requester.

Location

In the Navigation pane, click Management Tools > Query Designer > CBR Requester > Services > 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 using Credit Report Requester.

In the Navigation pane, click Management Tools > Query Designer > CBR Requester > Services > 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 using Credit Report Requester.

Location

In the Navigation pane, click Management Tools > Query Designer > CBR Requester > Services > 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 Equifax full credit report using Credit Report Requester.

Location

In the Navigation pane, click Management Tools > Query Designer > CBR Requester > Services > 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 SSN search report using Credit Report Requester.

Location

In the Navigation pane, click Management Tools > Query Designer > CBR Requester > Services > 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 an TransUnion DTEC (SSN) report using Credit Report Requester.

Location

In the Navigation pane, click Management Tools > Query Designer > CBR Requester > Services > 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 an TransUnion fact report using Credit Report Requester.

Location

In the Navigation pane, click Management Tools > Query Designer > CBR Requester > Services > 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 an TransUnion full credit report using Credit Report Requester.

Location

In the Navigation pane, click Management Tools > Query Designer > CBR Requester > Services > TransUnion Full.

Scope

This permission is available for all scopes.

Policy

User Restrictions by Conditions Permission (CBR Requester)

Use the User Restrictions by Conditions permission to restrict the accounts for which the user can request a credit bureau report using Credit Report Requester.

Location

In the Navigation pane, click Management Tools > Query Designer > CBR Requester > Services > User Restrictions by Conditions.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

N/A

Desk Mover Settings

Desk Mover Settings

Use the Desk Mover settings to specify permissions and policies for Desk Mover.

Access Desk Mover Permission

Use the Access Desk Mover permission to specify whether users can open Desk Mover to change desk assignments.

Location

In the Navigation pane, click Management Tools > Query Designer > Desk Mover > Access Desk Mover.

Scope

This permission is available for all scopes.

Policy

N/A

Letter Requester Settings

Letter Requester Settings

Use the Letter Requester settings to specify permissions and policies for Letter Requester.

Access Letter Requester Permission

Use the Access Letter Requester permission to specify whether users can open Letter Requester to request letters.

Location

In the Navigation pane, click Management Tools > Query Designer > Letter Requester > Access Letter Requester.

Scope

This permission is available for all scopes.

Policy

N/A

SIF Letters Permission

Use the SIF Letters permission to specify whether users can create Settled in Full (SIF) letter requests using Letter Requester.

Location

In the Navigation pane, click Management Tools > Query Designer > Letter Requester > SIF Letters.

Scope

This permission is available for all scopes.

Policy

N/A

User Restrictions by Conditions Permission (Letter Requester)

Use the User Restrictions by Conditions permission to restrict the accounts for which the user can request a letter using Letter Requester.

Location

In the Navigation pane, click Management Tools > Query Designer > Letter Requester > User Restrictions by Conditions.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

Status Changer Settings

Status Changer Settings

Use the Status Changer settings to specify permissions and policies for Status Changer.

Access Status Changer Permission

Use the Access Status Changer permission to specify whether users can open Status Changer to change the status of a group of accounts.

Location

In the Navigation pane, click Management Tools > Query Designer > Status Changer > Access Status Changer.

Scope

This permission is available for all scopes.

Policy

N/A

Use Literal Conditions Permission

Use the Use Literal Conditions permission to specify whether users can create a condition in Query Designer called "Literal Condition" and specify a block of SQL to use instead of the predefined conditions.

Location

In the Navigation pane, click Management Tools > Query Designer > Use Literal Conditions.

Scope

This permission is available for all scopes.

Policy

Security Settings

Security Settings

Use the Security settings to specify permissions and policies for locking user accounts and managing user passwords.

Account Lockout Permission

Use the Account Lockout permission to specify the settings for locking a user's account when the user's attempt to log on to Latitude is unsuccessful.

Location

In the Navigation pane, click Security > Account Lock Out Policy.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

The policy allows your organization to specify settings for unsuccessful logon attempts. Enable the permission for a scope and then specify the settings.

Maximum unsuccessful attempts: Maximum number of unsuccessful logon attempts allowed before Latitude locks the user account.

Duration of account lockout (min): Length of time in minutes that the account remains locked after an unsuccessful logon attempt.

API Key Manager

API Key Manager

You can generate and assign API keys to users to allow them to use the Latitude Web Service without requiring a user name and password in a configuration file. When a user sends a request to the Web Service using a valid API key, the system logs all activity to the user associated to that key. For example, external developers can send requests from their web application to query the Latitude Web Service for account information. Examples of external applications include web services, Windows services, desktop applications, and anything else that can send an HTTP request to access the Latitude Web Service.

Location

In the Navigation pane, click Security > API Key Manager.

Scope

This permission is available for the system scope only.

Policy

N/A

Add an API Key

Use the API Key Manager panel to generate and assign an API key to a user.

To add an API key

1. In the **Navigation** pane, click **Security** > **API Key Manager**.

Scope System	•			
Administration	Username	Display Name	АРІ Кеу	
Configuration	GSadmin	Job Manager	7e1d0cd2-8f2d-4c77-bc0a-19d8dd6df627	Revoke
Management Tools				
Security API Key Manager	User: GSadmi	n	Display Name: Job Manager Add	
Account Lock Out Policy Password Complexity				

User: Latitude User ID to assign to the API key.

Display Name: Name that identifies the API key assignment for internal reference. For example, you can use the display name to identify where to use the key.

2. Complete the information and then click **Add**. The system assigns a unique API key to the user and adds it to the data grid.

Revoke an API Key

Use the **API Key Manager** panel to revoke an API key assigned to a user. Once revoked, the system denies requests to the Latitude Web Service using that API key.

To revoke an API key

1. In the Navigation pane, click Security > API Key Manager.

Administration	Username	Display Name	API Key
Applications	GSadmin	Job Manager	7e1d0cd2-8f2d-4c77-bc0a-19d8dd6df627
Configuration			
Management Teels			
Management Tools			
Management Tools Security	User: GSadm	in	Display Name: Job Manager Add

2. In the data grid, click **Revoke**. The system revokes the API key and removes it from the data grid.

Password Complexity Permission

Use the Password Complexity permission to specify the requirements for creating a user password for Latitude.

Location

In the Navigation pane, click Security > Password Complexity.

Scope

This permission is available for the following scopes:

- System
- Role
- User
- Branch

Policy

The policy allows your organization to specify requirements for creating passwords. Enable the permission for a scope and then specify the requirements.

Minimum characters: Minimum number of characters required when creating a password.

Minimum character classes: Minimum number of different types of characters required when creating a password. Character classes include:

- Uppercase letters (A-Z)
- Lowercase letters (a-z)
- Numbers (0-9)
- Special characters (for example, ~!@#\$%)
- Control characters (for example, LF, TAB)

Password Expiration Permission

Use the Password Expiration permission to specify the settings for the expiration of user passwords in Latitude.

Location

In the **Navigation** pane, click **Security** > **Password Expiration**.

Scope

This permission is available for the following scopes:

- System
- Role
- User

• Branch

Policy

The policy allows your organization to specify settings for the expiration of passwords. Enable the permission for a scope and then specify the settings.

Maximum password age (days): Maximum number of days that users can use a password before it expires. If you set this value to zero, passwords never expire.

Minimum password age (days): Minimum number of days required to use a password before a user can change it. If you set this value to zero, users can change their password any time.

Enforce password history: Number of unique new passwords required before a user can reuse an old password.

Access Services Permission

Use the Access Services permission to specify whether users can view the Services menu in Fusion.

Location

In the Navigation pane, click Services > Access Services.

Scope

This permission is available for the all scopes.

Policy

N/A

System Codes and Settings

System Codes and Settings

Users with the <u>System Codes and Settings Permission</u> can customize codes and settings in the Latitude suite of products. For example, you can set up money buckets for storing money amounts related to an account. You can also set up letter types, claim types, status codes, payment methods, and various other codes.

For information about sorting and filtering data, see <u>Data Grids</u>.

Account Codes

Account Codes

You can set up and configure system account-related codes.

Anchor Cards

Anchor Cards

You can search for, add, and modify anchor cards to display in anchors. Anchors allow you to group anchor cards. For more information, see Delinquency or Recovery Anchor.

Add an Anchor Card

Use the Anchor Cards panel to add an anchor card.

To add an anchor card

1. In the Navigation pane, click System Codes and Settings > Accounts > Anchor Cards.

Scope System	•		
11		Name	Uri
Search	2	Party	workform/anchorCells/customer.tmpl.html
Administration			
Applications		Delinquency	workform/anchorCells/delinquency.tmpl.html
Configuration	_		
Management Tools	2	Account State	workform/anchorCells/accountState.tmpl.html
Security	_		
Services	C.	Hot Note	workform/anchorCells/hotnote.tmpl.html
📙 System Codes and Settings		Account Status	workform/anchorCells/accountStatus.tmpl.html
Accounts	C.	Account Status	workionnyanchorcens/accountstatus.unp.num
Anchor Cards	2	Contact	workform/anchorCells/contact.tmpl.html
Anchors		0011001	
Care Type		AIM	workform/anchorCells/aim.tmpl.html
Claim Types	C.	0411	work of the and role certay and comparison
Classes of Business		Charge Off Details	workform/anchorCells/chargeOffDetails.tmpl.html
Client	C.	charge on Details	worktornyanchorcens/chargeon/etails.onp.nom
Complaint Category Court		Pending Payments	workform/anchorCells/pendingPayments.tmpl.html
Desk	- C	Pending Payments	worktorm/anchorcells/pendingPayments.unpt.num
Dispute Type	_	1 at Dauty Active Collections	would ave to a collection of the first the state of all actions to all between the set
Documentation Categories	Z	1st Party Active Collections	workform/anchorCells/firstPartyActiveCollections.tmpl.htr
Extra Data	_	t annual tabal	und from the design of the tensor with the lateral lateral
Fee Schedule	Z	Account Label	workform/anchorCells/accountLabel.tmpl.html
Hardship Type	_		
Legal Court Case Statuses	2	Process Orchestration	workform/anchorCells/processOrchestration.tmpl.html
Letter Types	_		
List Data	2	Party Navigator	workform/anchorCells/partyNavigator.tmpl.html
Manual Process Stages			
Note Actions		Account Navigator	workform/anchorCells/accountNavigator.tmpl.html
Note Results			
Process Stages	+		O Help
Oueue Levels			

2. Click the plus sign (+). A blank row appears in the data grid.

System Codes and Settings

	Name	Url
	Party	workform/anchorCells/customer.tmpl.html
	Delinquency	workform/anchorCells/delinquency.tmpl.html
	Account State	workform/anchorCells/accountState.tmpl.html
	Hot Note	workform/anchorCells/hotnote.tmpl.html
	Account Status	workform/anchorCells/accountStatus.tmpl.html
	Contact	workform/anchorCells/contact.tmpl.html
	AIM	workform/anchorCells/aim.tmpl.html
	Charge Off Details	workform/anchorCells/chargeOffDetails.tmpl.html
	Pending Payments	workform/anchorCells/pendingPayments.tmpl.html
	1st Party Active Collections	$work form/anchor Cells/first {\tt PartyActiveCollections.tmpl.html}$
	Account Label	workform/anchorCells/accountLabel.tmpl.html
	Process Orchestration	workform/anchorCells/processOrchestration.tmpl.html
× ×	Name *	Url *

- 3. In the **Name** box, type the name of the anchor card.
- 4. In the **URL** box, type the path to the anchor card application page. For example, "workform/anchorCells/customer.tmpl.html."
- 5. Click the check mark.

Modify an Anchor Card

Use the Anchor Cards panel to modify an anchor card.

To modify an anchor card

1. In the Navigation pane, click System Codes and Settings > Accounts > Anchor Cards.

e System	•		
*		Name	Url
arch		Party	workform/anchorCells/customer.tmpl.html
Administration		,	
Applications	8	Delinquency	workform/anchorCells/delinquency.tmpl.html
Configuration	_		
Management Tools	C.	Account State	workform/anchorCells/accountState.tmpl.html
Security	_		
Services	⊂ Ø	Hot Note	workform/anchorCells/hotnote.tmpl.html
System Codes and Settings	CZ .	Account Status	workform/anchorCells/accountStatus.tmpl.html
Accounts			
Anchor Cards	8	Contact	workform/anchorCells/contact.tmpl.html
Anchors			
Care Type Claim Types	2	AIM	workform/anchorCells/aim.tmpl.html
Classes of Business			
Client	8	Charge Off Details	workform/anchorCells/chargeOffDetails.tmpl.html
Complaint Category			
Court	8	Pending Payments	workform/anchorCells/pendingPayments.tmpl.html
Desk	_		
Dispute Type	C	1st Party Active Collections	workform/anchorCells/firstPartyActiveCollections.tmpl.l
Documentation Categories	_		
Extra Data Fee Schedule	2	Account Label	workform/anchorCells/accountLabel.tmpl.html
Hardship Type	_		
Legal Court Case Statuses	2	Process Orchestration	workform/anchorCells/processOrchestration.tmpl.html
Letter Types	_		
List Data	C	Party Navigator	workform/anchorCells/partyNavigator.tmpl.html
Manual Process Stages			
Note Actions	2	Account Navigator	workform/anchorCells/accountNavigator.tmpl.html
Note Results			
Process Stages	+		O Hel
Oueue Levels			

2. Click the Edit icon. The anchor card appears in edit mode.

	Name	Url
2	Name Party	Url workform/anchorCells/cus
	Delinquency	workform/anchorCells/delinquency.tmpl.html
	Account State	workform/anchorCells/accountState.tmpl.html
	Hot Note	workform/anchorCells/hotnote.tmpl.html
	Account Status	workform/anchorCells/accountStatus.tmpl.html
	Contact	workform/anchorCells/contact.tmpl.html
	AIM	workform/anchorCells/aim.tmpl.html
	Charge Off Details	workform/anchorCells/chargeOffDetails.tmpl.html
	Pending Payments	workform/anchorCells/pendingPayments.tmpl.html
	1st Party Active Collections	$work form/anchor {\tt Cells}/first {\tt PartyActive Collections.tmpl.html}$
	Account Label	workform/anchorCells/accountLabel.tmpl.html
	Process Orchestration	workform/anchorCells/processOrchestration.tmpl.html

3. Modify the information and then click the check mark.

Anchors

Anchors

You can add anchors, delete anchors, add anchor cards to an anchor, and remove anchor cards from an anchor. Anchors allow you to group anchor cards for display. For more information, see Delinquency or Recovery Anchor.

Add an Anchor

Use the Anchors panel to add an anchor.

To add an anchor

1. In the Navigation pane, click System Codes and Settings > Accounts > Anchors.

Latitude Printable Help for Administrators

Scope System	
🖌 💉 Search	+
Administration	Standard Delinquency
Applications	× Standard Recovery
Configuration	Standard Recovery
🛅 Management Tools	• Help
Security	
Services	
늘 System Codes and Settings	
b Accounts	
Anchor Cards	
Anchors	

2. Click the plus sign (+). The panel appears in add mode.

+	
Cancel	
Name	
Save	
Standard Delinquency	
X Standard Recovery	

3. In the **Name** box, type the name of the anchor and then click **Save**.

Delete an Anchor

Use the **Anchors** panel to delete an anchor.

To delete an anchor

1. In the Navigation pane, click System Codes and Settings > Accounts > Anchors.

Scope System	
🖌 💉 Search	+
Administration	× Standard Delinquency
Applications	× Standard Recovery
Configuration	× Standard Recovery
Management Tools	• Help
E Security	
Services	
<mark>b</mark> System Codes and Settings	
Accounts	
Anchor Cards	
Anchors	

2. Click the Delete icon and then click **Yes**.

Add an Anchor Card to an Anchor

Use the Add Anchor Cell dialog box to add an anchor card to an anchor.

To add an anchor card to an anchor

1. In the Navigation pane, click System Codes and Settings > Accounts > Anchors.

Scope System	
🖌 💉 Search	+
Administration	Standard Delinquency
Applications	× Standard Recovery
Configuration	Sumard Recovery
💼 Management Tools	• Help
Security	
Services	
늘 System Codes and Settings	
b Accounts	
Anchor Cards	
Anchors	

2. Click the anchor to which to add an anchor card. The anchor expands.

Standa	ard Reco	very		
Name		Url	Display Order	
Contac	t	workform/anchorCells/contact.tmpl.html	1	×
Accour Status		workform/anchorCells/accountStatus.tmpl.html	2	×
Charge Details		workform/anchorCells/chargeOffDetails.tmpl.html	3	×
Pendin Payme		workform/anchorCells/pendingPayments.tmpl.html	4	×
AIM		workform/anchorCells/aim.tmpl.html	5	×
Proces Orches	is stration	workform/anchorCells/processOrchestration.tmpl.html	6	×

3. Under the data grid, click the plus sign (+). The **Add Anchor Cell** dialog box appears.

Add Anchor Cell			
Contact			
	Save	Cancel	🕑 Help

- 4. In the list box, click the anchor card to add to the anchor and then click **Save**. The system adds the anchor card to the data grid.
- 5. To change the card's display order, click the minus sign (-) to move up the card in the list. Click the plus sign (+) to move down the card in the list.
- 6. Click Save.

Delete an Anchor Card From an Anchor

Use the Anchor Card panel to delete an anchor card from an anchor.

To delete an anchor card from an anchor

1. In the Navigation pane, click System Codes and Settings > Accounts > Anchors.

Scope System	
🖌 💉 Search	•
Administration	Standard Delinquency
Applications	Standard Recovery
Configuration	Standard Recovery
🛅 Management Tools	O Help
Security	
Services	
System Codes and Settings	
늘 Accounts	
Anchor Cards	
Anchors	

2. Click the anchor to modify. The anchor expands.

Standard Reco	wery		
Name	Uri	Display Order	
Contact	workform/anchorCells/contact.tmpl.html	1	×
Account Status	workform/anchorCells/accountStatus.tmpl.html	2	×
Charge Off Details	workform/anchorCells/chargeOffDetails.tmpl.html	3	×
Pending Payments	workform/anchorCells/pendingPayments.tmpl.html	4	×
AIM	workform/anchorCells/aim.tmpl.html	5	×
Process Orchestration	workform/anchorCells/processOrchestration.tmpl.html	6	×

3. In the data grid, click the Delete icon and then click **OK**.

Care Types

Care Types

You can add, modify, and delete customer care types, such as armed forces, prison, and family bereavement. Users specify a care type when creating care cases. For more information, see Add a Care or Financial Hardship Case.

Add a Care Type

Use the **Care Type** panel to add a care type.

To add a care type

1. In the Navigation pane, click System Codes and Settings > Accounts > Care Type.

Scope System	•		On					-	-	-	-
Search		Code	Hold	Severity	Proof Required	Description	Consent Required	Created When	Modified When	Created By	Modified By
 Applications Configuration Management Tools 	*	NotInCare	0	0		Not in Care		2014-08- 28	2015-04- 15	SYSTEM	
Security Services	*	LD	10	2		Learning Difficulty	×.	2016-03- 22	2016-03- 22	GSadmin	GSadmin
System Codes and Settings Accounts Anchor Cards Anchors	×	LTI	10	2	8	Long Term Illness		2016-03- 22	2016-03- 22	GSadmin	GSadmin
Care Type Claim Types	+										Help

Code: Code that identifies the type of care, such as long-term illness or literacy issues.

On Hold Days: Default number of days to place the account on hold to suspend collection activity.

Severity: Level of severity (1-10) for the care type.

Proof Required: If selected, your organization requires proof of the need for care.

Description: Description of the care type.

Consent: If selected, you have consent from the customer to discuss care and financial hardship information.

- 2. Click the plus sign (+). A blank row appears in the data grid.
- 3. Complete the information and then click the check mark.

Modify a Care Type

Use the **Care Type** panel to modify a care type.

To modify a care type

1. In the Navigation pane, click System Codes and Settings > Accounts > Care Type.

Scope System	•										
Search		Code	On Hold Days	Severity	Proof Required	Description	Consent Required	Created When	Modified When	Created By	Modified By
Applications Configuration Management Tools	*	NotInCare	0	0		Not in Care		2014-08- 28	2015-04- 15	SYSTEM	
Security Services System Codes and Settings	*	LD	10	2	9	Learning Difficulty	X	2016-03- 22	2016-03- 22	GSadmin	GSadmin
Anchor Cards Anchors	×	LTI	10	2	8	Long Term Illness	8	2016-03- 22	2016-03- 22	GSadmin	GSadmin
Care Type Claim Types	+										🛛 Help

Code: Code that identifies the type of care, such as long-term illness or literacy issues.

On Hold Days: Default number of days to place the account on hold to suspend collection activity.

Severity: Level of severity (1-10) for the care type.

Proof Required: If selected, your organization requires proof of the need for care.

Description: Description of the care type.

Consent: If selected, you have consent from the customer to discuss care and financial hardship information.

- 2. Click the Edit icon. The care type appears in edit mode.
- 3. Modify the information and then click the check mark.

Delete a Care Type

Use the **Care Type** panel to delete a care type.

To delete a care type

1. In the Navigation pane, click System Codes and Settings > Accounts > Care Type.

Scope System	•										
Search		Code	On Hold Days	Severity	Proof Required	Description	Consent Required	Created When	Modified When	Created By	Modified By
 Applications Configuration Management Tools 	×	NotInCare	0	0		Not in Care		2014-08- 28	2015-04- 15	SYSTEM	
Security Services System Codes and Settings	*	LD	10	2	9	Learning Difficulty		2016-03- 22	2016-03- 22	GSadmin	GSadmin
Accounts Anchor Cards Anchors	×	LTI	10	2	8	Long Term Illness	8	2016-03- 22	2016-03- 22	GSadmin	GSadmin
Care Type Claim Types	+										🛛 Help

2. Click the Delete icon and then click **Yes**.

Claim Types

Claim Types

You can search for, add, modify, and delete claim types. The system uses claim types to determine the statute of limitations.

Add a Claim Type

Use the **Claim Types** panel to add a claim type.

To add a claim type

1. In the Navigation pane, click System Codes and Settings > Accounts > Claim Types.

Scope System	•		
11		Claim Type Code	Description
Search	🕜 🗙	VC	Verbal Claim
Administration			
Applications	+		
Configuration	_		
Management Tools			O Help
Security			
Services			
📙 System Codes and Settings			
Accounts			
Anchor Cards			
Anchors			
Care Type			
Claim Types			

2. Click the plus sign (+). A blank row appears in the data grid.

_	Claim Type Code	Description
	VC	Verbal Claim
× •	Claim Type Code *	Description *

- 3. In the **Claim Type Code** box, type a unique code for the claim type.
- 4. In the **Description** box, type a description of the claim type.
- 5. Click the check mark.

Modify a Claim Type

Use the **Claim Types** panel to modify a claim type.

To modify a claim type

1. In the Navigation pane, click System Codes and Settings > Accounts > Claim Types.

Scope System	•		
11	_	Claim Type Code	Description
Search		VC	Verbal Claim
Administration			
Applications	+		
Configuration	_		
Management Tools			Help
Security			
Services			
📂 System Codes and Settings			
b Accounts			
Anchor Cards			
Anchors			
Care Type			
Claim Types			

2. Click the Edit icon. The claim type appears in edit mode.

	Claim Type Code	Description
 Image: Control of the second se	Claim Type Code VC	Description Verbal Claim
		Verbai claim

3. Modify the information and then click the check mark.

Delete a Claim Type

Use the **Claim Types** panel to delete a claim type.

To delete a claim type

1. In the Navigation pane, click System Codes and Settings > Accounts > Claim Types.

Scope System	•		
11		Claim Type Code	Description
Search		VC	Verbal Claim
Administration			
Applications	+		
Configuration	_		
🛅 Management Tools			O Help
Security			
Services			
🖶 System Codes and Settings			
b Accounts			
Anchor Cards			
Anchors			
Care Type			
Claim Types			

2. Click the Delete icon and then click **Yes**.

Classes of Business

Classes of Business

You can search for, add, modify, and delete classes of business. You assign classes of business to clients to group them according to the type of company each of your clients represents. For more information, see <u>Maintain Client Account Information</u>. For imported accounts, Latitude assigns the class of business.

Add a Class of Business

Use the Classes of Business panel to add a class of business.

To add a class of business

1. In the Navigation pane, click System Codes and Settings > Accounts > Classes of Business.

Scope System	•		
2.1	_	Class of Business Code	Description
Search	x	00000	GENERAL CLASS OF BUSINESS
Administration Applications	x x	00001	Credit Cards
Configuration	+		
Management Tools Security			_
Services			• Help
System Codes and Settings Accounts			
Anchor Cards			
Anchors			
Care Type Claim Types			
Classes of Business			

2. Click the plus sign (+). A blank row appears in the data grid.

	Class of Business Code	Description		
	00000	GENERAL CLASS OF BUSINESS		
	00001	Credit Cards		
× •	Class of Business Code	Description *		

- 3. In the Class of Business Code box, type a unique code for the class of business.
- 4. In the **Description** box, type a description of the class of business.
- 5. Click the check mark.

Modify a Class of Business

Use the **Classes of Business** panel to modify a class of business.

To modify a class of business

1. In the Navigation pane, click System Codes and Settings > Accounts > Classes of Business.

Scope System	•		
11	-	Class of Business Code	Description
Search	Z	00000	GENERAL CLASS OF BUSINESS
Administration Applications	Z	00001	Credit Cards
Management Tools	+		
Security			🛛 Help
System Codes and Settings			
Accounts Anchor Cards			
Anchors Care Type			
Claim Types Classes of Business			

2. Click the Edit icon. The class of business appears in edit mode.

Class of Business Code	Description
00000	GENERAL CLASS OF BUSINESS
Class of Business Code	Description
00001	Credit Cards

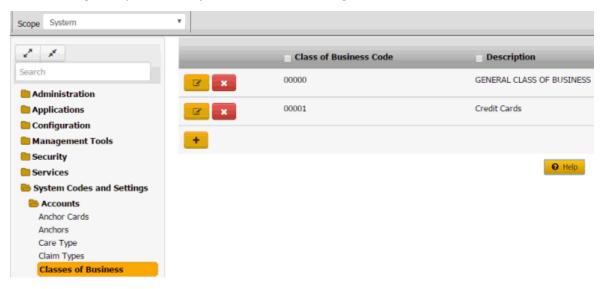
3. Modify the description and then click the check mark.

Delete a Class of Business

Use the **Classes of Business** panel to delete a class of business.

To delete a class of business

1. In the Navigation pane, click System Codes and Settings > Accounts > Classes of Business.



2. Click the Delete icon and then click **Yes**.

Clients

Clients

You can add and modify clients, but you cannot delete them.

Note: To add a client to a client group, use Latitude Console. For more information, see *Customer Groups* in the Latitude Console documentation. Clients are still referred to as "customers" in Latitude Console.

Add a Client

Use the **General** tab in the **Client** dialog box to maintain general information for a client.

To maintain general client information

1. In the Navigation pane, click System Codes and Settings > Accounts > Client.

Scope System	•				
11		Name	Code	Contact	Phone
Search	Ø	DEFAULT CUSTOMER	0000000	JOE	555-1212
Applications	2	CUSTOMER ONE	0000001	MATT	555-1212
Configuration Management Tools	2	CUSTOMER TWO	0000002	TOM SMITH	904-555-9984
Security	2	POD CUSTOMER	0000003	JOSH DRUMMEL	904-555-3255
System Codes and Settings	2	CUSTOMER THREE	0000004	JACK	555-1212
Anchor Cards Anchors	8	DIALER TEST CUSTOMER	0000005	SCOTT GORMAN	904-555-2325
Care Type Claim Types	8	CUSTOMER FOUR	0000006	MATT	555-1212
Classes of Business Client Complaint Category	×.	FIRST CUSTOMER	0000007	JOE BIDEN	555-2300
Court Desk	Ø	SECOND CUSTOMER	0000008	JOE BIDEN	555-2300
Dispute Type Documentation Categories	×.	THIRD CUSTOMER	0000009	CINDY PHILLIPS	555-2333
Extra Data Fee Schedule		DISNEY CUSTOMER	0000010	DONALD DUCK	555-2010
Hardship Type Legal Court Case Statuses	Ø	CUSTOM QUEUE CUSTOMER	0000011	JENNY SMITH	555-2598
Letter Types List Data Manual Process Stages	Z	POOL QUEUE CUSTOMER	0000012	JENNY SMITH	555-2598
Note Actions Note Results	×.	EXCHANGE CUSTOMER	0000013	DENIS ANTOINE	555-5644
Process Stages Oueue Levels	+				😯 Help

Tip: To limit the clients that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

2. Click the plus sign (+).

Client	×
The Client Code will uniquely identify the client. It cannot be changed once the client is created.	
Client Code:	•
Next	
	Cancel

3. In the **Client Code** box, type a unique code to identify the client and then click **Next**.

Client		×
Client Name:		Alpha Code:
Client Name	-	Alpha Code
Street 1:		Status:
Street 1	-	Default 🔻
Street 2:		Contact:
Street 2		Contact •
City:		Phone:
City	-	Phone •
County:		Fax:
County		Fax
Country:		E-mail:
Country		E-mail -
State:		Default Interest:
State		1 - 100 -
Postal Code:		Priority:
Postal Code		1 - 10 -
Next Back		
		Cancel Save

Client Name: Full name of the client.

Street 1: First line of the client's street address.

Street 2: Second line of the client's street address.

City: Client's city.

County: Client's county.

Country: Client's country.

State: Client's state.

Postal Code: Client's postal code.

Alpha Code: Generic code used for conversions from other systems. Allows your organization to reference any code associated to the client previously.

Status: Status of the account.

Contact: Full name of the contact person.

Phone: Contact person's phone number.

Fax: Contact person's fax number.

Email: Contact person's email address.

Default Interest: Interest rate to assign to new accounts imported for this client. You can override the rate using Exchange or manually. For more information, see <u>Maintain General Client</u> <u>Information</u>.

Priority: Sets the priority when spreading payments across linked accounts. Generally, the values are 1-10 (with 10 being the highest priority). You can assign the same priority to clients. Maximum settings allow up to 255 priorities.

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

Client		
First Letter	None	-
	Letter Pool	
Bank	None	
Salesman	None	•
Class of Business	None	•
CBR Setup	QA MODEL	
Is Principal Client		
Finish Back		
	Car	ncel Save

First Letter: First letter to generate for new accounts. For information about managing letters, see the *Letter Console* documentation.

Bank: If your organization prints checks for the client, this value is the trust account your organization uses for this client. For information about setting up trust accounts and printing checks, see the *Invoices* documentation.

Salesman: Salesman handling this client account. For more information, see Salesman.

Class of Business: Class of business to assign to this client account. For more information, see <u>Classes of Business</u>.

CBR Setup: Credit Bureau Reporting method.

Is Principle Client: If selected, your organization owns the accounts that this client holds. If cleared, your organization holds this client's accounts for collection purposes only.

- 5. To specify one or more letters to populate the **First Letter** list box, do the following:
- a. Click Letter Pool.

Note: Only the letters with a time restriction set in Letter Console to either "Allow Always" or "Only Allow in First 30 Days" appear in this dialog box.

Code	Description	Active
00000	NewLetterTemplate	
1	First Notice	
2	SIF	
3	Payment Reminder	
4	MultiPart SIF	2
5	Blanket SIF	0

- b. Select the check box for each letter you want to display in the First Letter list box.
- c. Clear the check box for each letter you don't want to display in the **First Letter** list box.
- d. Click Close.
 - 6. In the **First Letter** list box, click the first letter to send to customers.
 - 7. Complete the remaining information and then click **Finish**.

Maintain General Client Information

Use the General tab in the Client dialog box to maintain general information for a client.

To maintain general client information

1. In the Navigation pane, click System Codes and Settings > Accounts > Client.

cope System •				
1 1	Name	Code	Contact	Phone
Search	DEFAULT CUSTOMER	0000000	JOE	555-1212
Administration				
Applications	CUSTOMER ONE	0000001	MATT	555-1212
Configuration				
Management Tools	CUSTOMER TWO	0000002	TOM SMITH	904-555-990
Security				
Services	POD CUSTOMER	0000003	JOSH DRUMMEL	904-555-325
System Codes and Settings	CUSTOMER THREE	0000004	JACK	555-1212
Accounts	CUSTOMER THREE	000001	SHOR	555 1212
Anchor Cards	DIALER TEST CUSTOMER	0000005	SCOTT GORMAN	904-555-23
Anchors		000000	Scott Gottinat	501 555 25
Care Type	CUSTOMER FOUR	0000006	MATT	555-1212
	CUSTOMER FOUR	000000	POST 1	555 1212
Classes of Business	FIRST CUSTOMER	0000007	JOE BIDEN	555-2300
	FIRST CUSTOMER	000007	JOE BIDEN	333-2300
Complaint Category	SECOND CUSTOMER	0000008	JOE BIDEN	555-2300
Desk	SECOND CUSTOMER	000008	JOE BIDEN	555-2300
Disputo Tupo				
Documentation Categories	THIRD CUSTOMER	0000009	CINDY PHILLIPS	555-2333
Extra Data				
Fee Schedule	DISNEY CUSTOMER	0000010	DONALD DUCK	555-2010
Hardship Type				
	CUSTOM QUEUE CUSTOMER	0000011	JENNY SMITH	555-2598
Letter Types				
List Data	POOL QUEUE CUSTOMER	0000012	JENNY SMITH	555-2598
Manual Process Stages				
Note Actions	EXCHANGE CUSTOMER	0000013	DENIS ANTOINE	555-5644
Note Results				
Process Stages	+			😧 Help
Oueue Levels				

Tip: To limit the clients that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

- 2. To search for a client, do the following:
- a. Click one or more check boxes next to a column heading.
- b. In the **Filter** box for each check box selected, type the criteria for which to search.
- c. Click the Refresh icon. The system displays clients that match the specified criteria only.
- 3. In the data grid, click the Edit icon and then click **General**.

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3C Client	Client Code:	15	Country:	USA
eneral count	Alpha Code:	ABC	Culture Code:	Culture Code
es se Schedule	Client Name:	ABC Client	Contact:	Adam Adams
voice	Status:	ACTIVE *	Phone:	555555555
omments	Street 1:	1000 Main St	Fax:	Fax
terest	Street 2:	Street 2	E-mail:	Adam.Adams@ABC.com
	City:	Jacksonville	Default Interest:	
	State:	FL.	Priority:	1
	Postal Code:	32256		1
	County:	Duval	Collection Mode: Collection Cost Percent:	Original Balance
				0
			Collection Cost Money Bucket:	

Client Code: Unique code that your organization assigned to identify the client.

Alpha Code: Generic code used for conversions from other systems. Allows your organization to reference any code associated to the client previously.

Client Name: Full name of the client.

Status: Status of the account.

Street 1: First line of the client's street address.

Street 2: Second line of the client's street address.

City: Client's city.

State: Client's state.

Postal Code: Client's postal code.

County: Client's county.

Country: Client's country.

Culture Code: Code that indicates the region where the client is located. For example, "en-US" indicates the client is in an English-speaking country, and the country is the United States of America. Latitude uses this information for things such as determining which currency symbol to use.

Contact: Full name of the contact person.

Phone: Contact person's phone number.

Fax: Contact person's fax number.

E-mail: Contact person's email address.

Default Interest: Interest rate to assign to new accounts imported for this client. You can override the rate using Exchange or manually.

Priority: Sets the priority when spreading payments across linked accounts. Generally, the values are 1-10 (with 10 being the highest priority). You can assign the same priority to clients. Maximum settings allow up to 255 priorities.

Collection Mode: Method to use to calculate the portion of a payment to apply toward collection costs. Latitude allocates a portion of the payment toward the Collection Cost money bucket before applying the remaining payment amount to the other money buckets.

Original Balance: Calculates the collection cost on the original account balance. The formula is: Original account balance x Collection Cost Percent.

Current Gross: Calculates the collection cost on the current gross account balance. The formula is: $((1/(1-(Collection Cost Percent)))-1) \times (Principal + Interest + Other fees).$

Collection Cost Percent: Percent to use to calculate collection costs.

Collection Cost Money Bucket: Money bucket for storing collection costs. Latitude calculates the collection cost and adds it to this bucket when users add accounts manually for this client.

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

Maintain Client Account Information

Use the **Account** tab in the **Client** dialog box to maintain account information for a client.

To maintain client account information

1. In the Navigation pane, click System Codes and Settings > Accounts > Client.

Scope System *				
11	Name	Code	Contact	Phone
Search	DEFAULT CUSTOMER	0000000	JOE	555-1212
Administration				
Applications	CUSTOMER ONE	0000001	MATT	555-1212
Configuration				
🖿 Management Tools 🔤	CUSTOMER TWO	0000002	TOM SMITH	904-555-9984
Security		0000007		
Services	POD CUSTOMER	0000003	JOSH DRUMMEL	904-555-3255
System Codes and Settings	CUSTOMER THREE	0000004	JACK	555-1212
Accounts				
Anchor Cards	DIALER TEST CUSTOMER	0000005	SCOTT GORMAN	904-555-2325
Anchors Care Type				
	CUSTOMER FOUR	0000006	MATT	555-1212
Classes of Business				
Client	FIRST CUSTOMER	0000007	JOE BIDEN	555-2300
Complaint Category				
Court	SECOND CUSTOMER	0000008	JOE BIDEN	555-2300
Desk				
Dispute Type Documentation Categories	THIRD CUSTOMER	0000009	CINDY PHILLIPS	555-2333
Extra Data	DISNEY CUSTOMER	0000010	DONALD DUCK	555-2010
Fee Schedule	3			
Hardship Type	CUSTOM QUEUE CUSTOMER	0000011	JENNY SMITH	555-2598
Legal Court Case Statuses	*			
	POOL QUEUE CUSTOMER	0000012	JENNY SMITH	555-2598
Manual Process Stages				
	EXCHANGE CUSTOMER	0000013	DENIS ANTOINE	555-5644
Note Results				
Process Stages	+			O Help
Oueue Levels				

Tip: To limit the clients that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

2. In the data grid, click the Edit icon and then click Account.

Client					2
BABC Client General	First Letter	None Letter Pool			
Fees Fee Schedule	Bank	General Trust			
Invoice Info	Salesman	Bob the Sales Guy			
Comments Custom	Class of Business	GENERAL CLASS 0			
Interest	CBR Setup	QA MODEL			
				Gancel	Save

First Letter: First letter to generate for new accounts. For information about managing letters, see the *Letter Console* documentation.

Bank: If your organization prints checks for the client, this value is the trust account your organization uses for this client. For information about setting up trust accounts and printing checks, see the *Invoices* documentation.

Salesman: Salesman handling this client account. For more information, see <u>Salesman</u>.

Class of Business: Class of business to assign to this client account. For more information, see <u>Classes of Business</u>.

CBR Setup: Credit Bureau Reporting method.

Is Principle Client: If selected, your organization owns the accounts that this client holds. If cleared, your organization holds this client's accounts for collection purposes only.

- 3. To specify one or more letters to populate the First Letter list box, do the following:
- a. Click Letter Pool.

Note: Only the letters with a time restriction set in Letter Console to either "Allow Always" or "Only Allow in First 30 Days" appear in this dialog box.

Code	Description	Active
00000	NewLetterTemplate	
1	First Notice	
2	SIF	
3	Payment Reminder	
4	MultiPart SIF	
5	Blanket SIF	0

- b. Select the check box for each letter you want to display in the First Letter list box.
- c. Clear the check box for each letter you don't want to display in the **First Letter** list box.
- d. Click Close.
 - 4. In the First Letter list box, click the first letter to send to customers.
 - 5. Complete the remaining information and then click **Save**.

Maintain Client Fees

Use the Fees tab in the Client dialog box to maintain fees for a client.

To maintain client fees

1. In the Navigation pane, click System Codes and Settings > Accounts > Client.

Scope System				
11	Name	Code	Contact	Phone
Search	DEFAULT CUSTOMER	0000000	JOE	555-1212
Administration				
Applications	CUSTOMER ONE	0000001	MATT	555-1212
Configuration		0000000	TOM CHITLE	004 555 0004
Management Tools	CUSTOMER TWO	0000002	TOM SMITH	904-555-9984
Security	POD CUSTOMER	0000003	JOSH DRUMMEL	904-555-3255
Services	POD CUSTOMER	000003	JUSH DRUMMEL	904-000-0200
System Codes and Settings	CUSTOMER THREE	0000004	JACK	555-1212
Accounts				
Anchor Cards	DIALER TEST CUSTOMER	0000005	SCOTT GORMAN	904-555-2325
Anchors Care Type				
	CUSTOMER FOUR	0000006	MATT	555-1212
Classes of Business				
Client	FIRST CUSTOMER	0000007	JOE BIDEN	555-2300
Complaint Category				
Court	SECOND CUSTOMER	0000008	JOE BIDEN	555-2300
Desk				
Dispute Type Documentation Categories	THIRD CUSTOMER	0000009	CINDY PHILLIPS	555-2333
Extra Data	DISNEY CUSTOMER	0000010	DONALD DUCK	555-2010
Fee Schedule				
Hardship Type	CUSTOM QUEUE CUSTOMER	0000011	JENNY SMITH	555-2598
Legal Court Case Statuses Letter Types	<u> </u>			
	POOL QUEUE CUSTOMER	0000012	JENNY SMITH	555-2598
Manual Process Stages				
	EXCHANGE CUSTOMER	0000013	DENIS ANTOINE	555-5644
Note Results				
Process Stages	+			O Help
Oueue Levels				

Tip: To limit the clients that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

2. In the data grid, click the Edit icon and then click **Fees**.

Client		×
DEFAULT CUSTOMER General Account Fees Fee Schedule Invoice Info Comments Custom Interest	Free Demand Days Applies to PU Applies to PC Applies to PA Blanket SIF % Maximum Surcharge	0 80
		Cancel Save

Free Demand Days: Number of "grace" days to grant to a client when receiving new business.

Applies to PU: If selected, Latitude doesn't apply fees to the "Paid Us" payment type for the number days indicated in the **Free Demand Days** box.

Applies to PC: If selected, Latitude doesn't apply fees to the "Paid Client" payment type for the number days indicated in the **Free Demand Days** box.

Applies to PA: If selected, Latitude doesn't apply fees to the "Paid Agency" payment type for the number days indicated in the **Free Demand Days** box.

Blanket SIF %: Percentage of the account balance that the client requires as a minimum to consider an account settled in full.

Maximum Surcharge: Maximum surcharge amount on payments received. For more information, see Surcharge Rules.

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

Client Fee Schedule

Client Fee Schedule

You can add, modify, and delete fee schedules for a client. For more information, see Fee Schedules.

Add a Client Fee Schedule

Use the **Fee Schedule Detail** dialog box to add a fee schedule for a client. The fee schedule takes effect on the date you specify and remains in effect until you add a fee schedule with a later effective date.

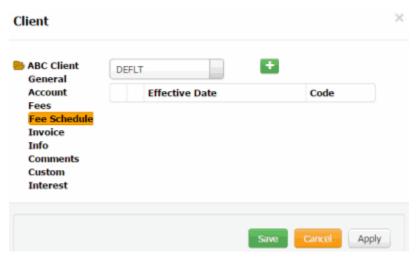
To add a client fee schedule

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Client**.

Scope System *				
11	Name	Code	Contact	Phone
Search	DEFAULT CUSTOMER	0000000	JOE	555-1212
Administration				
Applications	CUSTOMER ONE	0000001	MATT	555-1212
Configuration				
🖿 Management Tools 🤤	CUSTOMER TWO	0000002	TOM SMITH	904-555-9984
Security		0000002		
Services	POD CUSTOMER	0000003	JOSH DRUMMEL	904-555-3255
System Codes and Settings	CUSTOMER THREE	0000004	JACK	555-1212
Accounts	2			
Anchor Cards	DIALER TEST CUSTOMER	0000005	SCOTT GORMAN	904-555-2325
Anciors	*			
Care Type Claim Types	CUSTOMER FOUR	0000006	MATT	555-1212
Classes of Business				
	FIRST CUSTOMER	0000007	JOE BIDEN	555-2300
Complaint Category				
	SECOND CUSTOMER	0000008	JOE BIDEN	555-2300
Desk				
Dispute Type	THIRD CUSTOMER	0000009	CINDY PHILLIPS	555-2333
Documentation Categories				
Extra Data Fee Schedule	DISNEY CUSTOMER	0000010	DONALD DUCK	555-2010
Hardship Type	-			
	CUSTOM QUEUE CUSTOMER	0000011	JENNY SMITH	555-2598
Letter Types				
	POOL QUEUE CUSTOMER	0000012	JENNY SMITH	555-2598
Manual Process Stages				
	EXCHANGE CUSTOMER	0000013	DENIS ANTOINE	555-5644
Note Results				
Process Stages	+			🕜 Help
Oueue Levels				

Tip: To limit the clients that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

2. In the data grid, click the Edit icon and then click Fee Schedule.



3. In the list box, click the fee class and then click the plus sign (+).

Fee Sche	dule Detail	×
Name: ABC Cli Code: ABC Fee Class: COL		
Effective Date:	10/29/14	
Fee Codes:	00005	
	Save	e
Name: Clien	it's name.	_
Code: Uniqu	e code that identifies the client.	
Fee Class: C	ategory of fee schedule.	
Effective Da	te: Date the fee schedule takes effect.	

Fee Code: Unique number that identifies the fee schedule to use.

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

Modify a Client Fee Schedule

Use the **Fee Schedule Detail** dialog box to modify a fee schedule for a client. You cannot modify a fee schedule that has an effective date that is earlier than the current date.

To modify a client fee schedule

1. In the Navigation pane, click System Codes and Settings > Accounts > Client.

ope System *				
11	Name	Code	Contact	Phone
earch	Z DEFAULT CUSTOMER	0000000	JOE	555-1212
Administration				
Applications	CUSTOMER ONE	0000001	MATT	555-1212
Configuration		000000	7011011711	
Management Tools	CUSTOMER TWO	0000002	TOM SMITH	904-555-99
Security	POD CUSTOMER	0000003	JOSH DRUMMEL	904-555-32
Services	POD CUSTOMER	000005	JOSH DROMMEL	504-333-32
System Codes and Settings	CUSTOMER THREE	0000004	JACK	555-1212
Accounts				
Anchor Cards	Z DIALER TEST CUSTOMER	0000005	SCOTT GORMAN	904-555-23
Anchors Care Type				
	CUSTOMER FOUR	0000006	MATT	555-1212
Classes of Business				
Client	FIRST CUSTOMER	0000007	JOE BIDEN	555-2300
Complaint Category	-			
Court	Z SECOND CUSTOMER	0000008	JOE BIDEN	555-2300
Desk				
Dispute Type	Z THIRD CUSTOMER	0000009	CINDY PHILLIPS	555-2333
Documentation Categories				
Fee Schedule	Z DISNEY CUSTOMER	0000010	DONALD DUCK	555-2010
Hardship Type				
Legal Court Case Statuses	CUSTOM QUEUE CUSTOMER	0000011	JENNY SMITH	555-2598
Letter Types		0000012	THE CONTRACTOR	555 3500
	POOL QUEUE CUSTOMER	0000012	JENNY SMITH	555-2598
Manual Process Stages	EXCHANGE CUSTOMER	0000013	DENIS ANTOINE	555-5644
Note Actions	EXCHANGE CUSTOMER	000013	DENIS ANTOINE	555-5044
Procose Stagoe				😧 Help
Oueue Levels	+			• neip

Tip: To limit the clients that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

2. In the data grid, click the Edit icon and then click **Fee Schedule**.

Client				×
ABC Client General Account	DEFLT	Effective Date	+ Code	
Fees Fee Schedule Invoice Info Comments Custom Interest	2	11/27/17	0001	1
			Cancel	Save

3. In the list box, click the fee class and then, in the data grid, click the Edit icon.

Fee Sche	dule Detail ×
Name: ABC Cli Code: ABC Fee Class: COL	
Effective Date:	10/29/14
Fee Codes:	00005
	Save
Name: Clier	it's name.
C ode: Uniqu	e code that identifies the client.
ee Class: C	ategory of fee schedule. Valid values are:
COLC	T = Collector Fee Schedule.
DEFL	T: = Client Fee Schedule.
Effective Da	te: Date the fee schedule takes effect.
F ee Code: U	nique number that identifies the fee schedule to use.

4. Modify the information and then click **Save**.

Delete a Client Fee Schedule

Use the Fee Schedule tab in the Client dialog box to delete a fee schedule for a client.

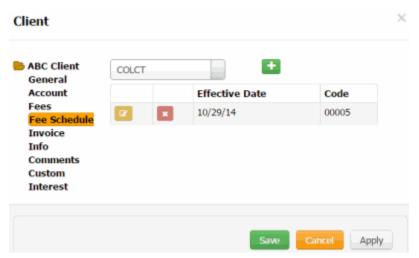
To delete a client fee schedule

1. In the Navigation pane, click System Codes and Settings > Accounts > Client.

Scope System				
11	Name	Code	Contact	Phone
Search	DEFAULT CUSTOMER	0000000	JOE	555-1212
Administration				
Applications	CUSTOMER ONE	0000001	MATT	555-1212
Configuration				
Management Tools	CUSTOMER TWO	0000002	TOM SMITH	904-555-9984
Security				
Services	POD CUSTOMER	0000003	JOSH DRUMMEL	904-555-3255
System Codes and Settings	CUSTOMER THREE	0000004	JACK	555-1212
Accounts				
Anchor Cards	DIALER TEST CUSTOMER	0000005	SCOTT GORMAN	904-555-2325
Anchors	<u> </u>			
Care Type	CUSTOMER FOUR	0000006	MATT	555-1212
Claim Types Classes of Business				
	FIRST CUSTOMER	0000007	JOE BIDEN	555-2300
Complaint Category	<u>«</u>			
	SECOND CUSTOMER	000008	JOE BIDEN	555-2300
Desk				
Dispute Type	THIRD CUSTOMER	0000009	CINDY PHILLIPS	555-2333
Documentation Categories				
Extra Data	DISNEY CUSTOMER	0000010	DONALD DUCK	555-2010
Fee Schedule				
Hardship Type Legal Court Case Statuses	CUSTOM QUEUE CUSTOMER	0000011	JENNY SMITH	555-2598
Letter Types				
	POOL QUEUE CUSTOMER	0000012	JENNY SMITH	555-2598
Manual Process Stages				
	EXCHANGE CUSTOMER	0000013	DENIS ANTOINE	555-5644
Note Results				
Process Stages	+			🔞 Help
Oueue Levels				

Tip: To limit the clients that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

2. In the data grid, click the Edit icon and then click Fee Schedule.



3. In the data grid, click the Delete icon and then click Yes.

Maintain Client Invoice Settings

Use the **Invoice** tab in the **Client** dialog box to maintain invoice settings for a client. These settings apply when invoicing clients using the Invoices program.

To maintain client invoice settings

1. In the Navigation pane, click System Codes and Settings > Accounts > Client.

Scope System	Ŧ				
1 1		Name	Code	Contact	Phone
Search	8	DEFAULT CUSTOMER	0000000	JOE	555-1212
Administration					
Applications		CUSTOMER ONE	0000001	MATT	555-1212
Configuration		CUSTOMER TWO	0000002	TOM SMITH	904-555-9984
Management Tools		COSTOMER TWO	000002	TOM SMITH	904-202-9984
Security	8	POD CUSTOMER	0000003	JOSH DRUMMEL	904-555-3255
System Codes and Settings	_				
System Codes and Settings Accounts		CUSTOMER THREE	0000004	JACK	555-1212
Anchor Cards	_	DIALER TEST CUSTOMER	0000005	SCOTT GORMAN	904-555-2325
Anchors	C.	DIALER TEST COSTOMER	0000005	SCOTT GORMAN	904-303-2323
Care Type	R	CUSTOMER FOUR	0000006	MATT	555-1212
Claim Types Classes of Business	<u> </u>				
Client	8	FIRST CUSTOMER	0000007	JOE BIDEN	555-2300
Complaint Category	_				
Court		SECOND CUSTOMER	0000008	JOE BIDEN	555-2300
Desk Dispute Type	_	TUTED CUSTOMED	0000000	CINDY PUTUIDC	555-0000
Documentation Categories	CH I	THIRD CUSTOMER	0000009	CINDY PHILLIPS	555-2333
Extra Data Fee Schedule		DISNEY CUSTOMER	0000010	DONALD DUCK	555-2010
Hardship Type Legal Court Case Statuses	2	CUSTOM QUEUE CUSTOMER	0000011	JENNY SMITH	555-2598
Letter Types List Data Manual Process Stages	2	POOL QUEUE CUSTOMER	0000012	JENNY SMITH	555-2598
Note Actions Note Results	2	EXCHANGE CUSTOMER	0000013	DENIS ANTOINE	555-5644
Process Stages Oueue Levels	+				😧 Help

Tip: To limit the clients that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

2. In the data grid, click the Edit icon and then click **Invoice**.

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C neral	Parent Client:	N/A *			
count	Invoice Type:	2 - COMBINED	*		
ees ee Schedule	Invoice Frequency:	2 - MONTHLY	*		
nvoice nfo	Invoice Method:	1 - NET	•		
omments	Invoice Sort:	2 - CUSTOMER ACCOL	٠		
ustom nterest	Remit Method:		*		
	Show Amount Due Client:	YES *			
	Number of days to allow payments by check to clear before including on an invoice:	0			
	Show Date Received :	×			
	Show Current Balance :	2			
	Show Other Name:	8			
	Show Original Date on Reversals:	8			
	Invoice Report:	BasicInvoice.rpt *			

Parent Client: Parent client associated to this client for invoicing purposes.

Invoice Type: Type of invoices to create. Valid values are:

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: Indicates how often to invoice the client.

Invoice Method: Method for invoicing the client.

Net: Doesn't include your organization's fee on client invoices.

Gross: Includes your organization's fee on client invoices.

Invoice Sort: Order to sort the invoices.

Remit Method: Determines the method for remitting invoices.

Manual: Your organization writes checks for the client manually.

Check: Your organization uses the Invoices program to print checks for the client.

ACH Transfer: Your organization uses the Invoices program to create ACH wire transfers for the client.

Show Amount Due Client: Indicates whether to include the amount due to the client on the invoice.

Number of days to allow payments by check to clear before including on invoice: Number of days to wait before including payments on a client invoice. If the customer's check does not clear, use this option to avoid sending payment information to a client.

Show Date Received, Current Balance, Amount Due Client, Other Name, Original Date on Reversals: If selected, the information prints on the client's invoices.

Invoice Report: File to use when creating invoices for the client. 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.

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

Maintain Client Guidelines

Use the **Info** tab in the **Client** dialog box to maintain the work plan, settlement guidelines, and miscellaneous information to display to users working a client's accounts. For more information, see View Client Guidelines.

To maintain client guidelines

1. In the Navigation pane, click System Codes and Settings > Accounts > Client.

Scope System	•				
11		Name	Code	Contact	Phone
Search	8	DEFAULT CUSTOMER	0000000	JOE	555-1212
Administration	-				
Applications	8	CUSTOMER ONE	0000001	MATT	555-1212
Configuration	_		0000000	TON OUTU	004 555 0004
Management Tools		CUSTOMER TWO	0000002	TOM SMITH	904-555-9984
Security	C.	POD CUSTOMER	0000003	JOSH DRUMMEL	904-555-3255
Services					
System Codes and Settings	8	CUSTOMER THREE	0000004	JACK	555-1212
Accounts Anchor Cards	_				
Anchors	8	DIALER TEST CUSTOMER	0000005	SCOTT GORMAN	904-555-2325
Care Type	_		0000005		555 4040
Claim Types Classes of Business		CUSTOMER FOUR	0000006	MATT	555-1212
Classes of Business	8	FIRST CUSTOMER	0000007	JOE BIDEN	555-2300
Complaint Category					
Court	8	SECOND CUSTOMER	0000008	JOE BIDEN	555-2300
Desk	_				
Dispute Type Documentation Categories	8	THIRD CUSTOMER	0000009	CINDY PHILLIPS	555-2333
Extra Data Fee Schedule	2	DISNEY CUSTOMER	0000010	DONALD DUCK	555-2010
Hardship Type	_				
Legal Court Case Statuses	8	CUSTOM QUEUE CUSTOMER	0000011	JENNY SMITH	555-2598
Letter Types List Data Manual Process Stages	2	POOL QUEUE CUSTOMER	0000012	JENNY SMITH	555-2598
Note Actions Note Results	8	EXCHANGE CUSTOMER	0000013	DENIS ANTOINE	555-5644
Process Stages Oueue Levels	+				• Help

2. In the data grid, click the Edit icon and then click Info.

Client			>
ABC Client General Account Fees Fee Schedule	Work Information:	Work Information	
Invoice Info Comments Custom Interest	Settlement Information:	Settlement Information	
	Miscellaneous Information:	Miscellaneous Information	
		Cancel	ave

Work Information: Information for working this client's accounts.

Settlement Information: Information on what constitutes a settlement on this client's accounts.

Miscellaneous Information: Miscellaneous information such as special client requirements.

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

Add a Client Comment

Use the **Comments** tab in the **Client** dialog box to add a client comment. Latitude creates comments for changes to client information and flags the comments as "Created by AUDIT." You cannot modify or delete client comments.

To add a client comment

1. In the Navigation pane, click System Codes and Settings > Accounts > Client.

Scope System *				
11	Name	Code	Contact	Phone
Search	DEFAULT CUSTOMER	0000000	JOE	555-1212
Administration				
Applications	CUSTOMER ONE	0000001	MATT	555-1212
Configuration				
Management Tools	CUSTOMER TWO	0000002	TOM SMITH	904-555-998
Security		0000000		004 555 005
Services	POD CUSTOMER	0000003	JOSH DRUMMEL	904-555-325
System Codes and Settings	CUSTOMER THREE	0000004	JACK	555-1212
Accounts	2			
Anchor Cards	DIALER TEST CUSTOMER	0000005	SCOTT GORMAN	904-555-232
Anchors				
Care Type	CUSTOMER FOUR	0000006	MATT	555-1212
Claim Types Classes of Business	2			
	FIRST CUSTOMER	0000007	JOE BIDEN	555-2300
Complaint Category	*			
	SECOND CUSTOMER	0000008	JOE BIDEN	555-2300
Desk				
Dispute Type	THIRD CUSTOMER	0000009	CINDY PHILLIPS	555-2333
Documentation Categories				
Extra Data	DISNEY CUSTOMER	0000010	DONALD DUCK	555-2010
Fee Schedule	-			
Hardship Type	CUSTOM QUEUE CUSTOMER	0000011	JENNY SMITH	555-2598
Legal Court Case Statuses	-			
	POOL QUEUE CUSTOMER	0000012	JENNY SMITH	555-2598
Manual Process Stages				
	EXCHANGE CUSTOMER	0000013	DENIS ANTOINE	555-5644
Note Results				
Process Stages	+			😯 Help
Oueue Levels				

2. In the data grid, click the Edit icon and then, in the **Client** dialog box, click **Comments**.

Client		×
ABC Client General Account Fees Fee Schedule Invoice Info Comments Custom Interest		
	Save Cancel	Apply

3. Click the plus sign (+).

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ABC Client			>
General Account Fees Fee Schedule Invoice Info Comments Custom Interest	Created By	Creation Date	Comment
			Cancel Save

- 4. Type a comment and then click the **Save** under the **Comment** box.
- 5. Click Save.

Custom Data

Custom Data

You can add or modify custom data for a client. This feature allows your organization to capture information for the client that you cannot include elsewhere in Latitude. Custom data includes dates, check box options, numeric values, and text. If your organization configured custom labels, you can add or modify custom data. For more information, see <u>Client Titles</u>.

Maintain Custom Dates

Use the **Dates** tab in the **Client** dialog box to maintain custom dates for a client. For more information, see <u>Maintain Client Date Titles</u>.

To maintain custom dates

1. In the Navigation pane, click System Codes and Settings > Accounts > Client.

Scope System	•				
1 1		Name	Code	Contact	Phone
Search	8	DEFAULT CUSTOMER	0000000	JOE	555-1212
Administration	_				
Applications	8	CUSTOMER ONE	0000001	MATT	555-1212
Configuration	_				
Management Tools	C.	CUSTOMER TWO	0000002	TOM SMITH	904-555-9984
Security	_		000000		
Services	8	POD CUSTOMER	0000003	JOSH DRUMMEL	904-555-3255
System Codes and Settings		CUSTOMER THREE	0000004	JACK	555-1212
Accounts	- B	COSTOMER THREE	000004	JACK	555-1212
Anchor Cards		DIALER TEST CUSTOMER	0000005	SCOTT GORMAN	904-555-232
Anchors	8		000000	SCOTT GOTTING	501 555 252.
Care Type	8	CUSTOMER FOUR	0000006	MATT	555-1212
Claim Types Classes of Business			5555555		
Client	12	FIRST CUSTOMER	0000007	JOE BIDEN	555-2300
Complaint Category					
Court	8	SECOND CUSTOMER	0000008	JOE BIDEN	555-2300
Desk					
Dispute Type	12	THIRD CUSTOMER	0000009	CINDY PHILLIPS	555-2333
Documentation Categories					
Extra Data	8	DISNEY CUSTOMER	0000010	DONALD DUCK	555-2010
Fee Schedule Hardship Type					
Legal Court Case Statuses	8	CUSTOM QUEUE CUSTOMER	0000011	JENNY SMITH	555-2598
Letter Types	_				
List Data	8	POOL QUEUE CUSTOMER	0000012	JENNY SMITH	555-2598
Manual Process Stages	_				
Note Actions	8	EXCHANGE CUSTOMER	0000013	DENIS ANTOINE	555-5644
Note Results					
Process Stages Queue Levels	+				Help

- 2. In the data grid, click the Edit icon and then click **Custom**.
- 3. Click the **Dates** tab.

Latitude Printable Help for Administrators

Client		×
ABC Client General Account	Dates Options Value Text	
Fees Fee Schedule Invoice Info	Date 1 Date 2	
Comments Custom Interest	Date 3 Date 4 Date 5	
	Date 6 Date 7	
	Date 8	
	Date 9	
	Cancel Save	

4. For each box with a custom label to the right, type a date and then click **Save**.

Maintain Custom Options

Use the **Options** tab in the **Client** dialog box to maintain custom options for a client. For more information, see <u>Maintain Client Option Titles</u>.

To maintain custom options

1. In the Navigation pane, click System Codes and Settings > Accounts > Client.

Scope System	•				
1 1		Name	Code	Contact	Phone
Search	8	DEFAULT CUSTOMER	0000000	JOE	555-1212
Administration	_				
Applications	8	CUSTOMER ONE	0000001	MATT	555-1212
Configuration	_				
Management Tools	C	CUSTOMER TWO	0000002	TOM SMITH	904-555-9984
Security	_		000000		
Services	8	POD CUSTOMER	0000003	JOSH DRUMMEL	904-555-3255
System Codes and Settings		CUSTOMER THREE	0000004	JACK	555-1212
Accounts	- B	COSTOMER THREE	000004	JACK	555-1212
Anchor Cards		DIALER TEST CUSTOMER	0000005	SCOTT GORMAN	904-555-232
Anchors	8		000000	SCOTT GOTTING	501 555 252.
Care Type	R	CUSTOMER FOUR	0000006	MATT	555-1212
Claim Types Classes of Business			5555555		
Client	12	FIRST CUSTOMER	0000007	JOE BIDEN	555-2300
Complaint Category					
Court	8	SECOND CUSTOMER	0000008	JOE BIDEN	555-2300
Desk					
Dispute Type	12	THIRD CUSTOMER	0000009	CINDY PHILLIPS	555-2333
Documentation Categories					
Extra Data	8	DISNEY CUSTOMER	0000010	DONALD DUCK	555-2010
Fee Schedule Hardship Type					
Legal Court Case Statuses	8	CUSTOM QUEUE CUSTOMER	0000011	JENNY SMITH	555-2598
Letter Types	_				
List Data	8	POOL QUEUE CUSTOMER	0000012	JENNY SMITH	555-2598
Manual Process Stages	_				
Note Actions	8	EXCHANGE CUSTOMER	0000013	DENIS ANTOINE	555-5644
Note Results					
Process Stages Queue Levels	+				Help

- 2. In the data grid, click the Edit icon and then click **Custom**.
- 3. Click the **Options** tab.

Latitude Printable Help for Administrators

Client						×
ABC Client General	Dates	Options Value	Text			
Account Fees	Option 1					
Fee Schedule	Option 2					
Invoice Info	Option 3					
Comments	Option 4					
Custom Interest	Option 5					
	Option 6					
	Option 7					
	Option 8					
	Option 9					
					Cancel	Save

- 4. For each check box with a custom label to the right, do one of the following:
 - To indicate a true statement, select the check box.
 - To indicate a false statement, clear the check box.
- 5. Click Save.

Maintain Custom Text

Use the **Text** tab in the **Client** dialog box to maintain custom alphanumeric values for a client. For more information, see <u>Maintain Client Text Titles</u>.

To maintain custom text

1. In the Navigation pane, click System Codes and Settings > Accounts > Client.

cope System				
1 1	Name	Code	Contact	Phone
Search	DEFAULT CUSTOMER	0000000	JOE	555-1212
Administration				
Applications	CUSTOMER ONE	0000001	MATT	555-1212
Configuration				
Management Tools	CUSTOMER TWO	0000002	TOM SMITH	904-555-99
Security				
Services	POD CUSTOMER	0000003	JOSH DRUMMEL	904-555-32
System Codes and Settings	CUSTOMER THREE	0000004	JACK	555-1212
b Accounts	COSTONER	000001	SHCK	555 1212
Anchor Cards	DIALER TEST CUSTOMER	0000005	SCOTT GORMAN	904-555-23
AIRINIS	DIALER TEST CUSTOMER	0000000	SCOTT GONAM	504 555 25
Care Type	CUSTOMER FOUR	0000006	MATT	555-1212
	CUSTOMER FOUR	000000	MALT.	555-1212
Classes of Business	FIRST CUSTOMER	0000007		FFF-2200
	FIRST CUSTOMER	000007	JOE BIDEN	555-2300
Complaint Category				
	SECOND CUSTOMER	0000008	JOE BIDEN	555-2300
Desk				
Dispute Type Documentation Categories	THIRD CUSTOMER	0000009	CINDY PHILLIPS	555-2333
Extra Data				
	DISNEY CUSTOMER	0000010	DONALD DUCK	555-2010
Hardship Type				
	CUSTOM QUEUE CUSTOMER	0000011	JENNY SMITH	555-2598
Letter Types				
	POOL QUEUE CUSTOMER	0000012	JENNY SMITH	555-2598
Manual Process Stages				
	EXCHANGE CUSTOMER	0000013	DENIS ANTOINE	555-5644
Note Results				
Process Stages	+			O Help
Oueue Levels				

- 2. In the data grid, click the Edit icon and then click **Custom**.
- 3. Click the **Text** tab.

Client eral	Dates	Options Value Text
unt	Text 1	Text
lule	Text 2	Text
ts	Text 3	Text
	Text 4	Text
	Text 5	Text

4. For each box with a custom label to the right, type information and then click **Save**.

Maintain Custom Values

Use the **Values** tab in the **Client** dialog box to maintain custom numeric values for a client. For more information, see <u>Maintain Client Value Titles</u>.

To maintain custom values

1. In the Navigation pane, click System Codes and Settings > Accounts > Client.

Scope System	•				
11		Name	Code	Contact	Phone
Search	8	DEFAULT CUSTOMER	0000000	JOE	555-1212
Administration					
Applications	8	CUSTOMER ONE	0000001	MATT	555-1212
Configuration	_	CUSTOMER TWO	0000002	TOM SMITH	904-555-9984
Management Tools		COSTOMER TWO	000002	TOM SMITH	904-555-9984
Security	8	POD CUSTOMER	0000003	JOSH DRUMMEL	904-555-3255
System Codes and Settings	2	CUSTOMER THREE	0000004	JACK	555-1212
b Accounts					
Anchor Cards Anchors	C.	DIALER TEST CUSTOMER	0000005	SCOTT GORMAN	904-555-2325
Care Type Claim Types		CUSTOMER FOUR	0000006	MATT	555-1212
Classes of Business Client	C2	FIRST CUSTOMER	0000007	JOE BIDEN	555-2300
Complaint Category Court Desk	2	SECOND CUSTOMER	0000008	JOE BIDEN	555-2300
Dispute Type Documentation Categories	8	THIRD CUSTOMER	0000009	CINDY PHILLIPS	555-2333
Extra Data Fee Schedule Hardship Type Legal Court Case Statuses Letter Types List Data Manual Process Stages	C.	DISNEY CUSTOMER	0000010	DONALD DUCK	555-2010
	C2	CUSTOM QUEUE CUSTOMER	0000011	JENNY SMITH	555-2598
	2	POOL QUEUE CUSTOMER	0000012	JENNY SMITH	555-2598
Note Actions Note Results	a	EXCHANGE CUSTOMER	0000013	DENIS ANTOINE	555-5644
Process Stages Oueue Levels	+				😧 Help

Tip: To limit the clients that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

- 2. In the data grid, click the Edit icon and then click **Custom**.
- 3. Click the Values tab.

Client			×
B ABC Client			
General	Dates	Options Value	e Text
Account Fees	Value 1	0	
Fee Schedule Invoice	Value 2	0	
Info Comments	Value 3	0	
Custom Interest	Value 4	0	
	Value 5	0	
	Value 6	0	
	Value 7	0	
	Value 8	0	
	Value 9	0	
			Cancel Save

4. For each box with a custom label to the right, type a numeric value and then click **Save**.

Client Interest

Client Interest

You can add, modify, and delete interest for a client. For more information, see Manage Interest.

Add Client Interest

Use the Interest Detail dialog box to add an interest rate used to calculate interest for a client.

To add client interest

1. In the Navigation pane, click System Codes and Settings > Accounts > Client.

Scope System				
11	Name	Code	Contact	Phone
Search	DEFAULT CUSTOMER	0000000	JOE	555-1212
Administration				
Applications	CUSTOMER ONE	0000001	MATT	555-1212
Configuration				
Management Tools	CUSTOMER TWO	0000002	TOM SMITH	904-555-9984
Security		0000000		
Services	POD CUSTOMER	0000003	JOSH DRUMMEL	904-555-3255
System Codes and Settings	CUSTOMER THREE	0000004	JACK	555-1212
Anchor Cards	DIALER TEST CUSTOMER	0000005	SCOTT GORMAN	904-555-2325
Anchors	<u> </u>			
Care Type Claim Types	CUSTOMER FOUR	0000006	MATT	555-1212
Classes of Business				
Client Complaint Category	FIRST CUSTOMER	0000007	JOE BIDEN	555-2300
Court	SECOND CUSTOMER	0000008	JOE BIDEN	555-2300
Desk Dispute Type Documentation Categories	THIRD CUSTOMER	0000009	CINDY PHILLIPS	555-2333
Extra Data Fee Schedule	DISNEY CUSTOMER	0000010	DONALD DUCK	555-2010
Legal court case statuses	CUSTOM QUEUE CUSTOMER	0000011	JENNY SMITH	555-2598
Letter Types List Data Manual Process Stages	POOL QUEUE CUSTOMER	0000012	JENNY SMITH	555-2598
	EXCHANGE CUSTOMER	0000013	DENIS ANTOINE	555-5644
Process Stages Oueue Levels	+			🛛 Help

2. In the data grid, click the Edit icon and then click Interest.

ABC Client	+												
General Account Fees	Effective Date	Rate	1	2	3	4	5	6	,	8	9	10	
Fee Schedule Invoice													
Info													
Comments Custom													
Interest													

3. Click the plus sign (+).

Interest	Detail		×
Name: ABC Cli Code: ABC	ient		
Effective Date:	10/29/14		
Rate:	0		
Check All			
Principal		Attorney Fees	
 Interest 		Misc 1	
Collection	Costs	Misc 2	
Bad Check	Chgs	Bucket #9	
Court Cost	:	Transaction Charges	
		Save	Close

Name: Client's name.

Code: Unique code that identifies the client.

Effective Date: Date the interest rate takes effect.

Rate: Interest rate as a whole number. For example, if the interest rate is 7 percent, type "7" in the box.

Check All: If selected, Latitude selects all the money bucket check boxes.

Principal: If selected, Latitude includes principal when calculating interest.

Collection Costs: If selected, Latitude includes collection costs when calculating interest.

Bad Check Charges: If selected, Latitude includes bad check charges when calculating interest.

Court Costs: If selected, Latitude includes court costs when calculating interest.

Attorney Fees: If selected, Latitude includes attorney fees when calculating interest.

Misc 1 and Misc 2: If selected, Latitude includes miscellaneous costs when calculating interest.

Bucket #9: If selected, Latitude includes the amount in this money bucket when calculating interest.

Transaction Charges: If selected, Latitude includes transaction charges when calculating interest.

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

Modify Client Interest

Use the **Interest Detail** dialog box to modify an interest rate for a client. You can modify the effective date, interest rate, and money buckets to include in interest calculations.

To modify client interest

1. In the Navigation pane, click System Codes and Settings > Accounts > Client.

Scope System				
11	Name	Code	Contact	Phone
Search	DEFAULT CUSTOMER	0000000	JOE	555-1212
Administration				
Applications	CUSTOMER ONE	0000001	MATT	555-1212
Configuration				
Management Tools	CUSTOMER TWO	0000002	TOM SMITH	904-555-9984
Security		0000002		
Services	POD CUSTOMER	0000003	JOSH DRUMMEL	904-555-3255
System Codes and Settings	CUSTOMER THREE	0000004	JACK	555-1212
Accounts				
Anchor Cards	DIALER TEST CUSTOMER	0000005	SCOTT GORMAN	904-555-2325
Anchors				
Care Type Claim Types	CUSTOMER FOUR	0000006	MATT	555-1212
Classes of Business				
	FIRST CUSTOMER	0000007	JOE BIDEN	555-2300
Complaint Category				
Court	SECOND CUSTOMER	0000008	JOE BIDEN	555-2300
Desk	-			
Dispute Type Documentation Categories	THIRD CUSTOMER	0000009	CINDY PHILLIPS	555-2333
Extra Data				
Fee Schedule	DISNEY CUSTOMER	0000010	DONALD DUCK	555-2010
Hardship Type		0000011	NEW CONTROL	FFF 2500
Legal Court Case Statuses	CUSTOM QUEUE CUSTOMER	0000011	JENNY SMITH	555-2598
Letter Types		0000012	THINK CMITH	555-2598
	POOL QUEUE CUSTOMER	0000012	JENNY SMITH	555-2598
Manual Process Stages	EXCHANGE CUSTOMER	0000013	DENIS ANTOINE	555-5644
Note Actions Note Results	EXCHANGE CUSTOMER	000013	DENIS ANTOINE	222-2044
Process Stages				O Help
Oueue Levels	+			• neip

2. In the data grid, click the Edit icon and then click Interest.

ABC Client	+													
General Account		-	Effective Date	Rate	1	2	3	4	5	6	7	8	9	10
Fees Fee Schedule	64	×	11/27/17	1	1	2								
Invoice Info Comments Custom Interest														

3. In the data grid, click the Edit icon.

Interest	Detail		×
Name: ABC Cli Code: ABC	ient		
Effective Date:	10/29/14	- m	
Rate:	.1		
Check All			
Principal		Attorney Fees	
Interest		Misc 1	
Collection	Costs	Misc 2	
Bad Check	Chgs	Bucket #9	
Court Cost	t	Transaction Characteristic	arges
			Save

Name: Client's name.

Code: Unique code that identifies the client.

Effective Date: Date the interest rate takes effect.

Rate: Interest rate as a whole number. For example, if the interest rate is 7 percent, type "7" in the box.

Check All: If selected, Latitude selects all the money bucket check boxes.

Principal: If selected, Latitude includes principal when calculating interest.

Collection Costs: If selected, Latitude includes collection costs when calculating interest.

Bad Check Charges: If selected, Latitude includes bad check charges when calculating interest.

Court Costs: If selected, Latitude includes court costs when calculating interest.

Attorney Fees: If selected, Latitude includes attorney fees when calculating interest.

Misc 1 and Misc 2: If selected, Latitude includes miscellaneous costs when calculating interest.

Bucket #9: If selected, Latitude includes the amount in this money bucket when calculating interest.

Transaction Charges: If selected, Latitude includes transaction charges when calculating interest.

4. Modify the information and then click **Save**.

Delete Client Interest

Use the Interest tab in the Client dialog box to delete an interest rate for a client.

To modify client interest

1. In the Navigation pane, click System Codes and Settings > Accounts > Client.

Scope System				
11	Name	Code	Contact	Phone
Search	DEFAULT CUSTOMER	0000000	JOE	555-1212
Administration				
Applications	CUSTOMER ONE	0000001	MATT	555-1212
Configuration				
Management Tools	CUSTOMER TWO	0000002	TOM SMITH	904-555-9984
Security		0000007		
Services	POD CUSTOMER	0000003	JOSH DRUMMEL	904-555-3255
System Codes and Settings	CUSTOMER THREE	0000004	JACK	555-1212
Accounts				
Anchor Cards	DIALER TEST CUSTOMER	0000005	SCOTT GORMAN	904-555-2325
Anchors	*			
Care Type Claim Types	CUSTOMER FOUR	0000006	MATT	555-1212
Classes of Business				
	FIRST CUSTOMER	0000007	JOE BIDEN	555-2300
Complaint Category				
Court	SECOND CUSTOMER	0000008	JOE BIDEN	555-2300
Desk	-			
Dispute Type Documentation Categories	THIRD CUSTOMER	0000009	CINDY PHILLIPS	555-2333
Extra Data				
Fee Schedule	DISNEY CUSTOMER	0000010	DONALD DUCK	555-2010
Hardship Type		0000011	NEW CONTROL	FFF 2500
Legal Court Case Statuses	CUSTOM QUEUE CUSTOMER	0000011	JENNY SMITH	555-2598
Letter Types		0000012	THINK CMITH	555-2598
	POOL QUEUE CUSTOMER	0000012	JENNY SMITH	555-2598
Manual Process Stages	EXCHANGE CUSTOMER	0000013	DENIS ANTOINE	555-5644
Note Actions Note Results	EXCHANGE CUSTOMER	0000013	DENIS ANTOINE	222-2044
Process Stages				O Help
Oueue Levels	+			• neip

2. In the data grid, click the Edit icon and then click Interest.

BC Client	+													
eneral ccount		-	Effective Date	Rate	1	2	3	4	5	6	7	8	9	10
ees ee Schedule	8	×	11/27/17	1	1	2								
nvoice nfo omments ustom nterest														

3. In the data grid, click the Delete icon and then click **Yes**.

Complaint Categories

Complaint Categories

You can add, modify, and delete complaint categories, such as contact strategy, regulatory, and service. Users specify a complaint category when adding complaints. For more information, see Add a Complaint.

Add a Complaint Category

Use the **Complaint Category** panel to add a complaint category.

To add a complaint category

1. In the Navigation pane, click System Codes and Settings > Accounts > Complaint Category.

Scope System	Y								
Search		Code	Description	SLA Days	Priority	Created When	Modified When	Created By	Modified By
Administration	*	UNK	Unknown	0	0	2015-04-15	2015-04-15	SYSTEM	
 Configuration Management Tools 	+								
Security									€ Help
ᡖ System Codes and Settings									
b Accounts									
Anchor Cards									
Anchors									
Care Type									
Claim Types									
Classes of Business									
Client									
Complaint Category									

Code: Code that identifies the complaint category.

Description: Description of the complaint category.

SLA Days: Number of days after receiving the complaint that you have to resolve it before breaching the Service Level Agreement (SLA).

Priority: Priority level that determines when the Complaint Department works the complaint.

Created When: Date and time a user created this complaint category.

Modified When: Date and time a user last modified this complaint category.

Created By: User who created this complaint category.

Modified By: User who last modified this complaint category.

- 2. Click the plus sign (+). A blank row appears in the data grid.
- 3. Complete the information and then click the check mark.

Modify a Complaint Category

Use the **Complaint Category** panel to modify a complaint category.

To modify a complaint category

1. In the Navigation pane, click System Codes and Settings > Accounts > Complaint Category.

cope System	•								
x ^x x Search		Code	Description	SLA Days	Priority	Created When	Modified When	Created By	Modifie By
Administration		UNK	Unknown	0	0	2015-04-15	2015-04-15	SYSTEM	
Applications	×								
Configuration	_								
Management Tools	+								
Security									_
Services									O Help
System Codes and Settings									
Accounts									
Anchor Cards									
Anchors									
Care Type									
Claim Types									
Classes of Business									
Client									
Complaint Category									

Code: Code that identifies the complaint category.

Description: Description of the complaint category.

SLA Days: Number of days after receiving the complaint that you have to resolve it before breaching the Service Level Agreement (SLA).

Priority: Priority level that determines when the Complaint Department works the complaint.

Created When: Date and time a user created this complaint category.

Modified When: Date and time a user last modified this complaint category.

Created By: User who created this complaint category.

Modified By: User who last modified this complaint category.

- 2. Click the Edit icon. The complaint category appears in edit mode.
- 3. Modify the information and then click the check mark.

Delete a Complaint Category

Use the **Complaint Category** panel to delete a complaint category.

To delete a complaint category

1. In the Navigation pane, click System Codes and Settings > Accounts > Complaint Category.

Search		Code	Description	SLA Days	Priority	Created When	Modified When	Created By	Modified By
Administration Applications	×	UNK	Unknown	0	0	2015-04-15	2015-04-15	SYSTEM	
Configuration Management Tools	+								
Security	_								_
Services									O Help
System Codes and Settings									
Accounts Anchor Cards Anchors Care Type Claim Types Classes of Business Client Complaint Category									

2. Click the Delete icon and then click **Yes**.

Courts

Courts

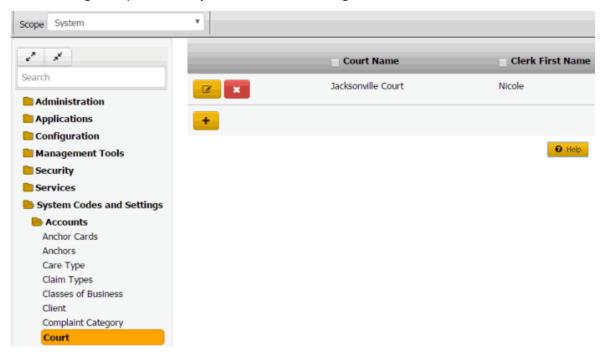
You can search for, add, modify, and delete courts of law. Users specify a court when assigning a court to a legal case. For more information, see Assign a Court.

Add a Court of Law

Use the **Court** dialog box to add a court of law.

To add a court of law

1. In the Navigation pane, click System Codes and Settings > Accounts > Court.



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2. Click the plus sign (+). The **Court** dialog box appears.

Court Name	Court Nam	e	•	
Street 1	Street 1			
Street 2	Street 2			
City/State/Zip	City	State	Postal Code	
County	County			
Phone	Phone			
Fax	Fax			

3. Complete the information and then click the **Clerk** tab.

Court Clerk First Name	First Name
Middle Name	Middle Name
Last Name	Last Name
Notes/Comments	Notes/Comments
	Save

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

Modify a Court of Law

Use the **Court** dialog box to modify a court of law.

To modify a court of law

1. In the Navigation pane, click System Codes and Settings > Accounts > Court.

Scope System	•		
1 1		Court Name	Clerk First Name
Search Administration	2 ×	Jacksonville Court	Nicole
Applications	+		
Configuration Management Tools			€ Help
Security			
Services System Codes and Settings			
Accounts Anchor Cards Anchors Care Type Claim Types Classes of Business Client			
Complaint Category Court			

2. Click the Edit icon Court dialog box appears.

Court		×
Court Clerk		
Court Name	Jacksonville Court	
Street 1	226 North Bay Street	
Street 2		
City/State/Zip	Jacksonville FL 32202	
County	Duval	
Phone	904-555-2366	
Fax	904-555-2399	
	Save Cancel	Apply

3. Modify the information and then click the **Clerk** tab.

Court	×
Court Clerk	
First Name	The Honorable Cathy
Middle Name	
Last Name	Coons
Notes/Comments	Notes/Comments
	li li
	Save Cancel Apply

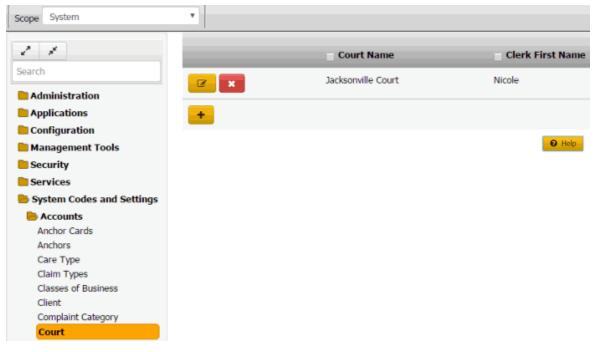
4. Modify the information and then click **Save**.

Delete a Court of Law

Use the **Court** panel to delete a court of law.

To delete a court of law

1. In the Navigation pane, click System Codes and Settings > Accounts > Court.



2. Click the Delete icon and then click **Yes**.

Custom Panel Mapping

Custom Panel Mapping

You can search for, add, modify, and delete custom anchor cards and reference panels. You map a custom anchor card or reference panel to a query that specifies the data to display in the card or panel. You can map a single query to one anchor card and one reference panel only.

For more information about creating queries for custom anchor cards or reference panels, see "Custom Panel Query Creator" in the Latitude Console documentation.

Search for a Custom Anchor Card or Reference Panel

Use the **Custom Panel Mapping** panel to search for a custom anchor card or reference panel.

To search for a custom anchor card or reference panel

1. In the Navigation pane, click System Codes and Settings > Accounts > Custom Panel Mapping.

🖍 🖌 Search	Q Clear	Filters	
Administration	Name	Туре	Query Name
Applications	📧 💌 Demo Panel	Anchor	Demo Query
Configuration Management Tools	New Reference Panel	Reference Panel	Custom Query
Security	Test Anchor Panel	Anchor	Open Fee Schedule Query
Services System Codes and Settings Accounts	+		
Anchor Cards Anchors Care Type Claim Types Classes of Business Client Complaint Category Court	Previous 1 Next		

- 2. In the Search box in the Custom Panel Mapping panel, type one or more characters to search and then press Enter or click the Search icon. The system searches the custom anchor card or reference panel name, type, and query name for a match. It displays only the custom anchor cards and reference panels that match your search criteria.
- 3. To clear the search criteria, click Clear Filters. The system displays all custom panel mappings.

Add a Custom Anchor Card or Reference Panel

Use the **Custom Panel Mapping** panel to add a custom anchor card or reference panel.

To add a custom anchor card or reference panel

1. In the Navigation pane, click System Codes and Settings > Accounts > Custom Panel Mapping.

🖍 🖈 Search	Q Clea	r Filters	
Administration	Name	Туре	Query Name
Applications	🕜 💌 Demo Panel	Anchor	Demo Query
Configuration	New Reference Panel	Reference Panel	Custom Query
Management Tools		Neterence Forter	coston Quei}
Security	🖉 💌 Test Anchor Panel	Anchor	Open Fee Schedule Query
Services			
System Codes and Settings	+		
b Accounts			_
Anchor Cards	Previous 1 Next		
Anchors			
Care Type			
Claim Types			
Classes of Business			
Client			
Complaint Category			
Court			

2. Click the plus sign (+). The Custom Panel Mapping dialog box appears.

ustom Panel M	lapping			
Туре	Anchor	٣		
Name	Name		•	
Query Name			•	
Events				
Field		Туре		

Type: Type of display to use for the mapped content. Valid values are:

- Anchor: Displays the mapped content in a custom anchor card.
- Reference Panel: Displays the mapped content in a custom reference panel.
- **Reference Panel with URL:** Opens the web page for the specified URL inside the custom reference panel and displays the mapped content within the web page.

ve Close

Name: Name to assign to the custom anchor card or reference panel.

Query Name: Name of the query to map to the custom anchor card or reference panel.

Note: You can map a single query to one anchor card and one reference panel only.

Events: Events that, when triggered, refresh the custom anchor card or reference panel. If you selected **Reference Panel with URL** from the **Type** list box, the **URL** box displays instead of the **Events** box.

URL: URL of the web page to display inside the custom reference panel. (just up to "documents". Latitude picks up the value and appends it.) If you selected **Anchor** or **Reference Panel** from the **Type** list box, the **Events** box displays instead of the **URL** box.

Column name: Field specified in the query to display in the custom anchor card or reference panel.

Display Name: Data type to assign to the field.

Parameter:

Field: Field specified in the query to display in the custom anchor card or reference panel. If the value is "TheData" (which represents a miscellaneous extra field), you can modify the value in this box.

Param Name: Name of the field (without spaces) to display in the custom anchor card or reference panel.

- 3. Complete the information and then click **Save**. One of the following occurs:
 - If you mapped a custom anchor card, the system adds the custom anchor card to the list of available anchor cards that you can associate to an anchor. For more information about anchor cards, see <u>Anchor Cards</u>.
 - If you mapped a custom reference panel, the system adds the custom reference panel to the list of available reference panels in the Reference Panels permission. For more information about the permission, see <u>Reference Panels Permission</u>.
- 4. Do one of the following:
 - If you mapped a custom anchor card, add the anchor card to an anchor to allow users to view the card. For more information, see <u>Add an Anchor Card to an Anchor</u>.
 - If you mapped a custom reference panel, select the reference panel in the Reference Panels permission to allow users to view the panel. For more information, see <u>Reference</u> <u>Panels Permission</u>.

Modify a Custom Anchor Card or Reference Panel

Use the **Custom Panel Mapping** panel to modify a custom anchor or reference panel.

To modify a custom anchor card or reference panel

1. In the Navigation pane, click System Codes and Settings > Accounts > Custom Panel Mapping.

Administration Name	Туре	Query Name
Applications Demo Panel		The second se
	Anchor	Demo Query
Configuration X New Reference Panel	Reference Panel	Custom Query
Management Tools	Kelei ence Parlei	Custom Query
Security Test Anchor Panel	Anchor	Open Fee Schedule Query
Services		
System Codes and Settings		
Secounts		
Anchor Cards Previous 1 Next		
Anchors Care Type		
Claim Types		
Classes of Business		
Client		
Complaint Category Court		

2. Click the Edit icon. The Custom Panel Mapping dialog box appears.

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Туре	Anchor	•		
Name	Demo Panel			
Query Name	Demo Query	٣		
Events	× PartyAddressAdded			
Field		Туре		
Account Number		Number	٣	
Status		String	٣	
Desk		String	•	
Desk				

Type: Type of display to use for the mapped content. Valid values are:

- Custom anchor card: Displays the mapped content in an anchor card.
- **Reference panel:** Displays the mapped content in a reference panel.
- **Reference panel URL:** Displays the mapped content in a reference panel along with a URL.

Save Close

Name: Name of the custom anchor card or reference panel.

Query Name: Name of the query mapped to the custom anchor card or reference panel.

Note: You can map a single query to one anchor card and one reference panel only.

Events: Events that, when triggered, refresh the custom anchor card or reference panel.

Field: Field specified in the query to display in the custom anchor card or reference panel.

Type: The field's data type.

- 3. Modify the information and then click **Save**. One of the following occurs:
 - If you changed the mapping from a custom reference panel to a custom anchor card, the system adds the card to the list of available anchor cards. The system removes the custom reference panel from the list of available reference panels in the Reference Panels permission.
 - If you changed the mapping from a custom anchor card to a custom reference panel, the system adds the panel to the list of available reference panels in the Reference Panels permission. The system removes the custom anchor card from the list of available anchor cards and removes it from the associated anchor.
- 4. Do one of the following:

- If you changed the mapping from a custom reference panel to a custom anchor card, add the anchor card to an anchor to allow users to view the card. For more information, see Add an Anchor Card to an Anchor.
- If you changed the mapping from a custom anchor card to a custom reference panel, select the reference panel in the Reference Panels permission to allow users to view the panel. For more information, see <u>Reference Panels Permission</u>.

Delete a Custom Anchor Card or Reference Panel

Use the **Custom Panel Mapping** panel to delete a custom anchor card or reference panel.

To delete a custom anchor card or reference panel

1. In the Navigation pane, click System Codes and Settings > Accounts > Custom Panel Mapping.

🛃 💉 Search		Q Clear F	ilters	
Administration		Name	Туре	Query Name
Applications	2	Demo Panel	Anchor	Demo Query
Configuration Management Tools	×	New Reference Panel	Reference Panel	Custom Query
Security	🕜 💌	Test Anchor Panel	Anchor	Open Fee Schedule Query
Services				
System Codes and Settings	+			
Accounts Anchor Cards	Previous	1 Next		
Anchors		and the second second		
Care Type				
Claim Types Classes of Business				
Client				
Complaint Category				

2. Click the Delete icon and then click **Yes**.

Desks

Desks

You can search for, add, modify, copy, and delete desks. You can also set limits for desks. You assign users to desks and then assign accounts to desks. Users work the accounts assigned to their desk.

Search for a Desk

Use the **Desk** panel to search for a desk.

To search for a desk

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Desk**.

× *		1	Q Clear Filters				
arch	D	esk	Name	Туре	Team	Department	Branch
Administration	2 x 0	000000	ADMIN 1 DESK	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
Applications	Z X C	1	COLLECTOR 1 DESK	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
Configuration							
Management Tools Security	2 🗙 D	ESK1	DESK MOVER 1	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
Services	🔁 💌 D	ESK2	DESK MOVER 2	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
System Codes and Settings	2 x D	IALERAPPD	DIALER APPEND DESK	ADMINISTRATOR	DIALER	COLLECTIONS DEPARTMENT	MAIN BRAN
Anchor Cards		IALERMERG	DIALER MERGE DESK	ADMINISTRATOR	DIALER	COLLECTIONS DEPARTMENT	MAIN BRAN
Anchors Care Type	🚾 💌 D	IALERNEW	DIALER NEW DESK	ADMINISTRATOR	DIALER	COLLECTIONS DEPARTMENT	MAIN BRAN
Claim Types Classes of Business	E E	QUIFAX	EQUIFAX	COLLECTOR	SRG TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
Client Complaint Category	2 💌 E	XCHDESK	EXCHANGE DESK	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
Court Desk	<mark>2</mark> 🛛 E	XPERIAN	EXPERIAN	COLLECTOR	SRG TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
Dispute Type	2 X F	EE	FEE DESK	ADMINISTRATOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
Documentation Categories Extra Data	Z X U	IQUID	LIQUID LAT ACCTS	ADMINISTRATOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
Fee Schedule Hardship Type	🗷 💌 N	EW	NEW BUSINESS INVENTORY	INVENTORY	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
Legal Court Case Statuses Letter Types	2 🗷 P	OD	POD COLLECTOR	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
List Data Manual Process Stages	2 8 P	OOL	POOL DESK	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
Note Actions Note Results Process Stages	+						

- 2. In the **Search** box in the **Desk** panel, type one or more characters to search and then press **Enter** or click the Search icon. The system searches the desk code, desk name, desk type, team, department, and branch for a match. It displays only the desks that match your search criteria.
- 3. To clear the search criteria, click **Clear Filters**. The system displays all desks.

Add a Desk

Use the **Desk** dialog box to add a desk code.

To add a desk code

1. In the Navigation pane, click System Codes and Settings > Accounts > Desk.

System Codes and Settings

1			Q Clear Filters				
arch	D	esk	Name	Туре	Team	Department	Branch
Administration	2 🗙 00	000000	ADMIN 1 DESK	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
Applications	Z X C1	1	COLLECTOR 1 DESK	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
Configuration Management Tools		ESK1	DESK MOVER 1	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
Security		ESKI	DESK MOVER I	COLLECTOR	BLOE TEAM	COLLECTIONS DEPARTMENT	MAIN DIGAN
Services	🕜 💌 DE	ESK2	DESK MOVER 2	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
System Codes and Settings		IALERAPPD	DIALER APPEND DESK	ADMINISTRATOR	DIALER	COLLECTIONS DEPARTMENT	MAIN BRAN
Accounts Anchor Cards Anchor		IALERMERG	DIALER MERGE DESK	ADMINISTRATOR	DIALER	COLLECTIONS DEPARTMENT	MAIN BRAN
Anchors Care Type		IALERNEW	DIALER NEW DESK	ADMINISTRATOR	DIALER	COLLECTIONS DEPARTMENT	MAIN BRAN
Claim Types Classes of Business	EQ	QUIFAX	EQUIFAX	COLLECTOR	SRG TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
Client Complaint Category		KCHDESK	EXCHANGE DESK	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
Court	🗷 🗙 EX	KPERIAN	EXPERIAN	COLLECTOR	SRG TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
Dispute Type Documentation Categories	E FE	EE	FEE DESK	ADMINISTRATOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
Extra Data	🗷 🗙 LI	QUID	LIQUID LAT ACCTS	ADMINISTRATOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
Fee Schedule Hardship Type	🗷 💌 Ne	EW	NEW BUSINESS INVENTORY	INVENTORY	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
Legal Court Case Statuses Letter Types	🗷 🔳 PC	DD	POD COLLECTOR	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
List Data Manual Process Stages	Z 🛛 PC	DOL	POOL DESK	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
Note Actions Note Results Process Stages	+						

2. Click the plus sign (+). The **Desk** dialog box appears with the **General** tab selected.

Desk					
Code	Code	*			
Name	Name				
Team	BLUE TEA	М			
Desk Type	ADMINIST	RATOR	•		
General	Work Flow	Credit Bureau	Goals		
Alias	Alias				
Extension	Extension				
Email	Email				
🔲 Include th	is desk in que	eue report			
Prevent line	nking of accou	ints in this desk			
Case Limit	d				
Set limit	:				
				Save	Close

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, except for the inventory desk. Latitude uses Inventory desks to receive new business for your organization. Valid values are:

Administrator: Not used

Clerical: Not used

Supervisor: Not used

AIM: Used only for holding accounts forwarded to outside agencies using the Agency Interface Module (AIM) program.

Collector: Holds accounts for a particular user.

Inventory: Repository for new accounts, used when importing new business. You can distribute accounts in the inventory desk using the Desk Mover program.

Alias: Collector's name inserted in letters in place of the Alias merge field.

Extension: Collector's phone extension inserted in letters in place of the Extension merge field.

Email: Collector's email address inserted in letters in place of the Email merge field.

Include this desk in queue report: If selected, the Collector Queue and Monthly Collections reports include account information for this desk.

Prevent linking of accounts in this desk: If selected, you cannot link accounts in this desk to other accounts. This option only applies when linking accounts automatically using Link Console. Manual linking does not respect this rule.

Unlimited: If selected, the desk can have an unlimited number of accounts assigned to it.

Set Limit: If selected, type the maximum number of accounts that users can assign to a desk.

3. Complete the information and then click the **Work Flow** tab.

Desk						×
Code	Code		Name	Name		
Team		BLUE TEAM		•		
Desk Type		ADMINISTRAT	OR	•		
General	Work Flo	w Credit Bu	reau Goals			
Account s	hould be wo	rked every	WaitDays		days	
Work new	/ business fo	r	NewBusinessWa	aitDays	days	
Daily work	k limit		DailyLimit			
Maximum	days for fut	ure reminders	MaximumRemin	derDays		
Maximum	days for fut	ure follow-up	MaximumFollov	/UpDays		
				Save	Cancel	Apply

Accounts should be worked every _____ days: Maximum number of days between working an account assigned to this desk that Latitude waits before setting an account follow-up for the next day.

Work new business for <u>days</u>: Maximum number of days that the user can work an account assigned to this desk as queue level 016 (new business follow-up) before the account moves to another queue level.

Daily Work Limit: Maximum number of accounts that this desk can have 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.

4. Complete the information and then click the **Credit Bureau** tab.

Desk						×
Code	le		Name	Name		
Team	BLUE TE	AM		•		
Desk Type	ADMINI	STRATOR		•		
General W	/ork Flow Cre	edit Bureau	Goals			
Credit Bureau	u Limits					
Monthly Limit	Monthly	vCbrRequests				
Requests	0					
Remaining						
				Save	Cancel	Apply

Monthly Limit: Maximum number of credit bureau reports the desk can request each month. You cannot set this number higher than 32,000.

Requests Remaining: If setting up 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. Latitude starts tracking this number after you save the desk.

- × Desk Code Code Name Name Team ٠ BLUE TEAM Desk Type ADMINISTRATOR ٠ Work Flow Credit Bureau General Goals Monthly Goal(1) MonthlyGoal Monthly Goal(2) MonthlyGoal2 Special(1) Special1 Special(2) Special2 Special(3) Special3 Apply
- 5. Complete the information and then click the 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.

6. Complete the information and then click **Save**.

Modify a Desk

Use the **Desk** dialog box to modify a desk code.

To modify a desk code

1. In the Navigation pane, click System Codes and Settings > Accounts > Desk.

2 X Clear Filters									
arch	De	sk	Name	Туре	Team	Department	Branch		
Administration	2 1 00	00000	ADMIN 1 DESK	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRANG		
Applications	Z X C1		COLLECTOR 1 DESK	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN		
Configuration	C1		COLLECTOR I DESK	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN		
Management Tools	🗷 🗙 DE	SK1	DESK MOVER 1	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN		
Security									
Services	Z 🗶 DE	SK2	DESK MOVER 2	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN		
System Codes and Settings	🗷 💌 DIA	ALERAPPD	DIALER APPEND DESK	ADMINISTRATOR	DIALER	COLLECTIONS DEPARTMENT	MAIN BRAN		
Accounts Anchor Cards		ALERMERG	DIALER MERGE DESK	ADMINISTRATOR	DIALER	COLLECTIONS DEPARTMENT	MAIN BRAN		
Anchors Care Type		ALERNEW	DIALER NEW DESK	ADMINISTRATOR	DIALER	COLLECTIONS DEPARTMENT	MAIN BRAN		
Claim Types Classes of Business	2 🗙 EQ	UIFAX	EQUIFAX	COLLECTOR	SRG TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN		
Client Complaint Category	EX	CHDESK	EXCHANGE DESK	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN		
Court	EX	PERIAN	EXPERIAN	COLLECTOR	SRG TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN		
Desk Dispute Type	😰 💌 FE	-	FEE DESK	ADMINISTRATOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN		
Documentation Categories		-	FEE DESK	ADMINISTRATOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MALIN DRAIN		
Extra Data		QUID	LIQUID LAT ACCTS	ADMINISTRATOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN		
Fee Schedule Hardship Type	😰 💌 NE	W	NEW BUSINESS INVENTORY	INVENTORY	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN		
Legal Court Case Statuses Letter Types	PO	D	POD COLLECTOR	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN		
List Data Manual Process Stages	🗷 🗶 PO	OL	POOL DESK	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN		
Note Actions Note Results Process Stages	+								

2. Click the Edit icon. The **Desk** dialog box appears with the **General** tab selected.

Latitude Printable Help for Administrators

Desk					
Code	Code	*			
Name	Name				
Team	BLUE TEAR	М			
Desk Type	ADMINIST	RATOR	•		
General \	Work Flow	Credit Bureau	Goals		
Alias	Alias				
Extension	Extension				
Email	Email				
Include this	s desk in que	ue report			
Prevent link	king of accou	ints in this desk			
Case Limit	I				
Set limit					
				Save	Close

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, except for the inventory desk. Latitude uses Inventory desks to receive new business for your organization. Valid values are:

Administrator: Not used

Clerical: Not used

Supervisor: Not used

AIM: Used only for holding accounts forwarded to outside agencies using the Agency Interface Module (AIM) program.

Collector: Holds accounts for a particular user.

Inventory: Repository for new accounts, used when importing new business. You can distribute accounts in the inventory desk using the Desk Mover program.

Alias: Collector's name inserted in letters in place of the Alias merge field.

Extension: Collector's phone extension inserted in letters in place of the Extension merge field.

Email: Collector's email address inserted in letters in place of the Email merge field.

Include this desk in queue report: If selected, the Collector Queue and Monthly Collections reports include account information for this desk.

Prevent linking of accounts in this desk: If selected, you cannot link accounts in this desk to other accounts. This option only applies when linking accounts automatically using Link Console. Manual linking does not respect this rule.

Unlimited: If selected, the desk can have an unlimited number of accounts assigned to it.

Set Limit: If selected, type the maximum number of accounts that users can assign to a desk.

3. Modify the information and then click the **Work Flow** tab.

Desk						\times
Code	Code		Name	Name		
Team		BLUE TEAM		•		
Desk Type		ADMINISTRAT	OR	•		
General	Work Flow	Credit Bu	reau Goals			
Account sh	ould be worke	ed every	WaitDays		days	
Work new	business for		NewBusinessWa	itDays	days	
Daily work	limit		DailyLimit			
Maximum	days for future	e reminders	MaximumRemin	derDays		
Maximum	days for future	e follow-up	MaximumFollow	UpDays		
				Save	Cancel	Apply

Accounts should be worked every <u>days</u>: Number of days an account is idle while assigned to the desk that Latitude waits before prompting the user to work it. Once this number of days passes, Latitude sets the follow-up date to the next day.

Work new business for _____days: Number of days that the user works new business while it's assigned to the desk. Once the user works the new business for the specified number of days, Latitude moves the account to the 0-30 day queue (020).

Daily Work Limit: Number of accounts that 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.

4. Modify the information as necessary and then click the **Credit Bureau** tab.

Desk							×
Code	Code			Name	Name		
Team		BLU	IE TEAM		•		
Desk Type		AD	MINISTRATOR		•		
General	Work	Flow	Credit Bureau	Goals			
Credit Bu	ıreau Lin	nits					
Monthly Li	imit	Mo	onthlyCbrRequests				
Requests Remaining	_	0					
rvenidinini	A						
					Save	Cancel	Apply

Monthly Limit: Maximum number of credit bureau reports the desk can request each month. You cannot set this number higher than 32,000.

Requests Remaining: If setting up 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. Latitude starts tracking this number after you save the desk.

5. Modify the information as necessary and then click the **Goals** tab.

Code		Name	Name	
am	BLUE TEAM		•	
esk Type	ADMINISTRATOR	L	•	
General Work F	Flow Credit Burea	u Goals		
Monthly Goal(1)	MonthlyGoal			
Monthly Goal(2)	MonthlyGoal2			
Special(1)	Special1			
Special(2)	Special2			
Special(3)	Special3			

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.

6. Modify the information as necessary and then click **Save**.

Delete a Desk

Use the **Desk** panel to delete a desk code. Only Administrators can delete desk codes.

To delete a desk code

1. In the **Navigation** pane, click **System Codes and Settings** > **Accounts** > **Desk**.

2 X	Q Clear Filters						
earch		Desk	Name	Туре	Team	Department	Branch
Administration	2 ×	0000000	ADMIN 1 DESK	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
Applications		C1	COLLECTOR 1 DESK	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
Configuration		CI	COLLECTOR I DESK	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN DRAN
Management Tools	Z	DESK1	DESK MOVER 1	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
Security		DECKO	DESK MOVER 2	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
Services	2 ×	DESK2	DESK MOVER 2	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
System Codes and Settings	2 x	DIALERAPPD	DIALER APPEND DESK	ADMINISTRATOR	DIALER	COLLECTIONS DEPARTMENT	MAIN BRAN
Accounts Anchor Cards		DIALERMERG	DIALER MERGE DESK	ADMINISTRATOR	DIALER	COLLECTIONS DEPARTMENT	MAIN BRAN
Anchor Cards Anchors	X	DIALERMENG	DIALER MERGE DESK	ADMINISTRATOR	DIALER	COLLECTIONS DEPARTMENT	MALIN DRAI
Care Type	Z X	DIALERNEW	DIALER NEW DESK	ADMINISTRATOR	DIALER	COLLECTIONS DEPARTMENT	MAIN BRAN
Claim Types		EOUIFAX	EQUIFAX	COLLECTOR	SRG TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
Classes of Business		EQUIPAX	EQUIPAN	COLLECTOR	SNG TEAM	COLLECTIONS DEPARTMENT	MAIN DIVA
Client Complaint Category	2	EXCHDESK	EXCHANGE DESK	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
Court		EVER DATE:	DUDEDIAN	001150705			
Desk	2 ×	EXPERIAN	EXPERIAN	COLLECTOR	SRG TEAM	COLLECTIONS DEPARTMENT	MAIN BRAI
Dispute Type	2 X	FEE	FEE DESK	ADMINISTRATOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAI
Documentation Categories		LIQUID	LIQUID LAT ACCTS	ADMINISTRATOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
Extra Data Fee Schedule	X	LIQUID	LIQUID LAT ACCTS	ADMINISTRATOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAI
Hardship Type	🗷 🗷	NEW	NEW BUSINESS INVENTORY	INVENTORY	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
Legal Court Case Statuses		POD	POD COLLECTOR	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
Letter Types List Data		100	TOD COLLECTOR	COLLECTOR	020212001		
Manual Process Stages	🚾 💌	POOL	POOL DESK	COLLECTOR	BLUE TEAM	COLLECTIONS DEPARTMENT	MAIN BRAN
Note Actions	-						
Note Results	+						
Process Stages							0

2. Click the Delete icon and then click **Yes**.

Dispute Types

Dispute Types

You can add, modify, and delete debt dispute types, such as partial balance, full balance, and account ownership. Users specify a dispute type when adding disputes. For more information, see Add a Dispute.

Add a Dispute Type

Use the **Dispute Type** panel to add a dispute type.

To add a dispute type

1. In the Navigation pane, click System Codes and Settings > Accounts > Dispute Type.

Scope System	•							
Search		Code	Proof Required	Description	Created When	Modified When	Created By	Modified By
Administration	×	UNK		Unknown	2015-04- 15T18:34:56Z	2015-04- 15T18:34:56Z	SYSTEM	
Configuration Management Tools Security	+							
 Security Services System Codes and Settings 								O Help
Accounts Anchor Cards								
Anchors Care Type Claim Types								
Classes of Business Client								
Complaint Category Court Desk								
Dispute Type								

Code: Code that identifies the dispute type.

Proof Required: If selected, your organization requires proof of the dispute.

Description: Description of the dispute type.

Created When: Date and time a user created this dispute type.

Modified When: Date and time a user last modified this dispute type.

Created By: User who created this dispute type.

Modified By: User who last modified this dispute type.

- 2. Click the plus sign (+). A blank row appears in the data grid.
- 3. Complete the information and then click the check mark.

Modify a Dispute Type

Use the **Dispute Type** panel to modify a dispute type.

To modify a dispute type

1. In the Navigation pane, click System Codes and Settings > Accounts > Dispute Type.

earch		Code	Proof Required	Description	Created When	Modified When	Created By	Modified By
Administration Applications	×	UNK		Unknown	2015-04- 15T18:34:56Z	2015-04- 15T18:34:56Z	SYSTEM	
Configuration Management Tools Security	+							
Services								🛛 Help
System Codes and Settings Accounts								
Anchor Cards								
Anchors								
Care Type								
Claim Types								
Classes of Business								
Client								
Complaint Category								
Court								
Desk								

Code: Code that identifies the dispute type.

Proof Required: If selected, your organization requires proof of the dispute.

Description: Description of the dispute type.

Created When: Date and time a user created this dispute type.

Modified When: Date and time a user last modified this dispute type.

Created By: User who created this dispute type.

Modified By: User who last modified this dispute type.

- 2. Click the Edit icon. The dispute type appears in edit mode.
- 3. Modify the information and then click the check mark.

Delete a Dispute Type

Use the **Dispute Type** panel to delete a dispute type.

To delete a dispute type

1. In the Navigation pane, click System Codes and Settings > Accounts > Dispute Type.

earch	Code	Proof Required	Description	Created When	Modified When	Created By	Modified By
Administration Applications	UNK		Unknown	2015-04- 15T18:34:56Z	2015-04- 15T18:34:56Z	SYSTEM	
Configuration Management Tools	+						
Security							🛛 Help
System Codes and Settings							
Accounts							
Anchor Cards							
Anchors							
Care Type							
Claim Types							
Classes of Business							
Client							
Complaint Category							
Court							

2. Click the Delete icon and then click **Yes**.

Documentation Categories

Documentation Categories

You can search for, add, modify, and delete documentation categories. Users specify a documentation category when attaching a document to an account. For more information, see Attach a Document to an Account.

Add a Documentation Category

Use the **Documentation Categories** panel to add a documentation category.

To add a documentation category

1. In the Navigation pane, click System Codes and Settings > Accounts > Documentation Categories.

Scope System	•		
11		Code	Description
Search	×	ТАХ	Tax Statement
Applications	+		
Configuration			• Help
Management Tools Security			
Services			
System Codes and Settings			
Accounts Anchor Cards			
Anchors			
Care Type Claim Types			
Classes of Business			
Client			
Complaint Category Court			
Desk			
Dispute Type Documentation			
Categories			

2. Click the plus sign (+). A blank row appears in the data grid.

	Code	Description
	TAX	Tax Statement
× •	Code *	Description *

- 3. In the **Code** box, type a unique code for the documentation category.
- 4. In the **Description** box, type a description of the documentation category.
- 5. Click the check mark.

Modify a Documentation Category

Use the **Documentation Categories** panel to modify a documentation category.

To modify a documentation category

1. In the Navigation pane, click System Codes and Settings > Accounts > Documentation Categories.

1 1		Code	Description
Search		TAX	Tax Statement
Administration			
Applications	+		
Configuration			
Management Tools			🕑 Help
Security			
Services			
System Codes and Settings			
Accounts			
Anchor Cards			
Anchors			
Care Type			
Claim Types			
Classes of Business			
Client			
Complaint Category			
Court			
Desk			
Dispute Type			

2. Click the Edit icon. The documentation category appears in edit mode.

Code	Description
Code	Description
 TAX	Tax Statement

3. Modify the information and then click the check mark.

Delete a Documentation Category

Use the **Documentation Categories** panel to delete a documentation category.

To delete a documentation category

1. In the Navigation pane, click System Codes and Settings > Accounts > Documentation Categories.

Scope System	•		
2 1		Code	Description
Search		TAX	Tax Statement
Administration			
Applications	+		
Configuration	_		
Management Tools			O Help
Security			
Services			
System Codes and Settings			
Accounts			
Anchor Cards			
Anchors			
Care Type			
Claim Types			
Classes of Business			
Client			
Complaint Category			
Court			
Desk			
Dispute Type			
Documentation Categories			

2. Click the Delete icon and then click **Yes**.

Extra Data Codes

Extra Data Codes

You can search for, add, modify, and delete extra data codes. Extra data codes allow your organization to create categories to assign to custom data that users create. Users specify an extra data code when adding extra data. For more information, see Extra Data.

Add an Extra Data Code

Use the Extra Data dialog box to add an extra data code.

To add an extra data code

1. In the Navigation pane, click System Codes and Settings > Accounts > Extra Data.

Scope System	•]		
2.1	_	Extra Data	Description
Search	X	CC	CREDIT COUNSELING
Administration			
Applications		L1	LETTER FIELDS 1
Configuration			
Management Tools	X	L2	LETTER FIELDS 2
Security			
Services	S ×	L3	LETTER MERGE 3
bystem Codes and Settings		14	LETTER MERGE 4
Accounts	×	24	LETTER MERGE 4
Anchor Cards		Ш	LANDLORD
Anchors	X	-	24122010
Care Type		MI	MISCELLANEOUS INFO
Claim Types Classes of Business			
Client		R1	REFERENCE 1
Complaint Category			
Court	x x	R2	REFERENCE 2
Desk			
Dispute Type		R3	REFERENCE 3
Documentation Categories			
Extra Data Fee Schedule	x	R4	REFERENCE 4
Hardship Type			
Legal Court Case Statuses	X	R5	REFERENCE 5
Letter Types			
List Data		R6	REFERENCE 6
Manual Process Stages			
Note Actions	x	R7	REFERENCE 7
Note Results			
Process Stages Queue Levels	+		O Help

2. Click the plus sign (+). The **Extra Data** dialog box appears.

tra Data de	ExtraDataControlId	
escription	Title	-
	Title	Mouse Help Description
Line1	Title1	Description1
Line2	Title2	Description2
Line3	Title3	Description3
Line4	Title4	Description4
Line1	Title5	Description5

Extra Data Code: Unique two-character code that identifies the extra data.

Description: Description that appears next to the extra data code when a user is adding extra data to an account.

Title: Title for the information.

Mouse Help Description: Text to display when a user rests the mouse on the title.

Note: You can assign up to five lines of information to the code.

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

Modify an Extra Data Code

Use the **Extra Data** dialog box to modify an extra data code.

To modify an extra data code

1. In the Navigation pane, click System Codes and Settings > Accounts > Extra Data.

Scope System	•		
11		Extra Data	Description
Search		CC	CREDIT COUNSELING
Administration			
Applications	2 ×	L	LETTER FIELDS 1
Configuration			
Management Tools	x	L2	LETTER FIELDS 2
Security	_	L3	LETTER MERGE 3
Services	3 X	В	LETTER MERGE 3
System Codes and Settings		L4	LETTER MERGE 4
Accounts	X	2.	
Anchor Cards		Ц	LANDLORD
Anchors			
Care Type Claim Types	x x	MI	MISCELLANEOUS INF
Classes of Business			
Client		R1	REFERENCE 1
Complaint Category			
Court	× ×	R2	REFERENCE 2
Desk			
Dispute Type Documentation Categories		R3	REFERENCE 3
Extra Data			
Fee Schedule	X	R4	REFERENCE 4
Hardship Type			
Legal Court Case Statuses	x	R5	REFERENCE 5
Letter Types	_	54	
List Data	2 ×	R6	REFERENCE 6
Manual Process Stages Note Actions		R7	REFERENCE 7
Note Results	×	N/	REPERENCE /
Process Stages	-		• Help
Oueue Levels	-		O help

2. Click the plus sign (+). The **Extra Data** dialog box appears.

tra Data de	ExtraDataControlId	
scription	Title	
	Title	Mouse Help Description
Line1	Title1	Description1
Line2	Title2	Description2
Line3	Title3	Description3
Line4	Title4	Description4
Líne1	Title5	DescriptionS

Extra Data Code: Unique two-character code that identifies the extra data.

Description: Description that appears next to the extra data code when a user is adding extra data to an account.

Title: Title for the information.

Mouse Help Description: Text to display when a user rests the mouse on the title.

Note: You can assign up to five lines of information to the code.

3. Modify the information and then click **Save**.

Delete an Extra Data Code

Use the **Extra Data** panel to delete an extra data code.

To delete an extra data code

1. In the Navigation pane, click System Codes and Settings > Accounts > Extra Data.

Scope System *			
11		Extra Data	Description
Search	z. 🗙	сс	CREDIT COUNSELING
Administration			
Applications	z 🗙	u	LETTER FIELDS 1
Configuration			
🛅 Management Tools 🤤	Z	12	LETTER FIELDS 2
Security			
Services	X	L3	LETTER MERGE 3
System Codes and Settings	z	L4	LETTER MERGE 4
Accounts			
Anchor Cards	2 ×	ц	LANDLORD
Anchors			
Care Type Claim Types	z x	MI	MISCELLANEOUS INF
Classes of Business			
Client	Z X	R1	REFERENCE 1
Complaint Category			
Court	Z X	R2	REFERENCE 2
Desk			
Dispute Type	2 x	R3	REFERENCE 3
Documentation Categories			
Extra Data	Z X	R4	REFERENCE 4
Fee Schedule Hardship Type			
	Z x	R5	REFERENCE 5
Letter Types			
	2 ×	R6	REFERENCE 6
Manual Process Stages			
	z x	R7	REFERENCE 7
Note Results			
Process Stages	+		• Help
Oueue Levels			

2. Click the Delete icon and then click **Yes**.

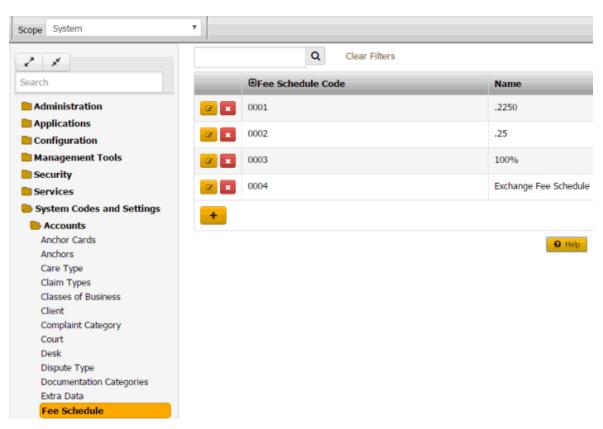
Fee Schedules

Search for a Fee Schedule

Use the **Fee Schedule** panel to search for a fee schedule.

To search for a fee schedule

1. In the Navigation pane, click System Codes and Settings > Accounts > Fee Schedule.



- 2. In the **Search** box in the **Fee Schedule** panel, type one or more characters to search and then press **Enter** or click the Search icon. The system searches the fee schedule code and name for a match. It displays only the fee schedules that match your search criteria.
- 3. To clear the search criteria, click Clear Filters. The system displays all fee schedules.

Add a Fee Schedule

Use the Fee Schedule dialog box to add a fee schedule.

To add a fee schedule

1. In the Navigation pane, click System Codes and Settings > Accounts > Fee Schedule.

Scope System	•	
2 1	Q Clear Filters	
Search	Fee Schedule Code	Name
Administration	2 X 0001	.2250
Applications Configuration	2 0002	.25
Management Tools	0003	100%
Security Services	2 2 0004	Exchange Fee Schedule
System Codes and Settings	+	
Accounts		
Anchor Cards		O Help
Anchors		
Care Type		
Claim Types		
Classes of Business		
Client		
Complaint Category		
Court		
Desk		
Dispute Type		
Documentation Categories Extra Data		

2. Click the plus sign (+). The Fee Schedule dialog box appears.

Fee Schedule Name:	
Name	
Fee Schedule Type:	
Age Based	
From Date	
To Date	

Fee Schedule Name: Description of the fee schedule.

Fee Schedule Type: Method for calculating fees.

From Date (available for age-based fee schedules only)

Received Date: Calculate fees starting on the account placement date.

Client DLP: Calculate fees starting on the date of the last payment to the client.

Client DLC: Calculate fees starting on the date of the last charge to the account.

Our DLP: Calculate fees starting on the date of the last payment to your organization.

[Blank]: Calculate fees starting from a user-defined date. These options represent the userdefined dates from your organization's control file.

To Date (available for age-based fee schedules only)

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 to the client.

Client DLC: Calculate fees up to the date of the last charge to the account.

Our DLP: Calculate fees up to the date of the last payment to your organization.

[Blank]: Calculate fees up to the user-defined date. These options represent the userdefined dates from your organization's control file.

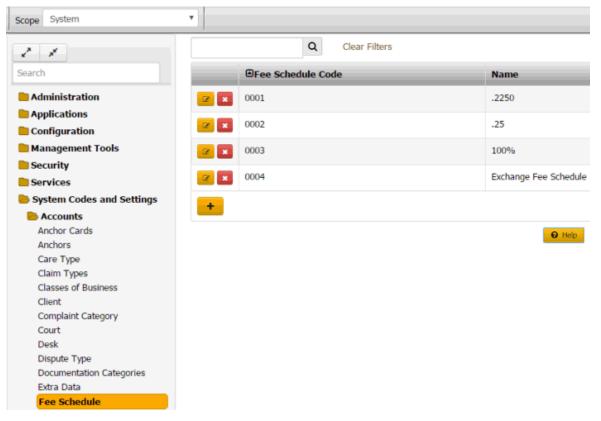
3. Complete the information and then click **Save**.

Modify an Age-Based Fee Schedule

Use the Fee Schedule dialog box to modify an age-based fee schedule.

To modify an age-based fee schedule

1. In the Navigation pane, click System Codes and Settings > Accounts > Fee Schedule.



2. Click the Edit icon. The Fee Schedule dialog box appears.

Fee Schedule: 00013 From: ReceivedDate -								
						0 To	31 To	61 To
Age Based	Alloc%	PU	PC	PA	Priority	30	60	1000000
Principal	100				3	30	25	22.5
Interest	100	۲		۲	4	22.5	25	22.5
Collection Costs	100				5	30	25	22.5
Bad Check Chgs	100				2	0	0	0
Court Costs	100				6	30	25	22.5
Attorney Fees	100				7	30	25	22.5
Misc Costs	100				8	0	0	0
Available for use	100				9	0	0	0
Available for use	100				10	0	0	0
Transaction Charges	100				1	0	0	0

Fee Schedule: Number and name that identifies the fee schedule.

From Date

Received Date: Calculate fees starting on the account placement date.

Client DLP: Calculate fees starting on the date of the last payment to the client.

Client DLC: Calculate fees starting on the date of the last charge to the account.

Our DLP: Calculate fees starting on the date of the last payment to your organization.

[Blank]: Calculate fees starting from a user-defined date. These options represent the userdefined dates from your organization's control file.

To Date

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 to the client.

Client DLC: Calculate fees up to the date of the last charge to the account.

Our DLP: Calculate fees up to the date of the last payment to your organization.

[Blank]: Calculate fees up to the user-defined date. These options represent the user-defined dates from your organization's control file.

[Money Buckets]: Repositories for amounts you want to record in Latitude.

Alloc %: (Allocation percent) Percentage of the payment amount to allocate to the money bucket. The amount available to allocate toward a money bucket is the remaining payment amount to allocate times the money bucket's allocation rate. When Latitude allocates all the money buckets and an amount to pay remains, Latitude allocates the remaining amount based on priority. If the balance in a money bucket is less than the allocation amount, the remaining allocation amount becomes available to allocate to other money buckets with a lower priority.

PU: (Paid Us) If selected, client invoices include the amounts shown or paid into the money bucket for this payment type.

PC: (Paid Client) If selected, client invoices include the amounts shown or paid into the money bucket for this payment type.

PA: (Paid Agency) If selected, client invoices include the amounts shown or paid into the money bucket for this payment type.

Priority: Order in which to apply payments to the corresponding money bucket. Latitude applies payments to the money bucket with a priority of "1" first. If there are funds remaining, the system applies the payment to the bucket set as priority 2. The system continues applying the payment until no funds remain or the account balance is zero. If the account has a balance after applying the full payment amount received, the system applies the next payment you receive to the highest priority bucket that has a balance remaining. Generally, you order the priority from 1 to 10, from top to bottom.

To: Account balance range in which to apply fees. The first **To** column is always active, and indicates the first (or only) account balance range to use for the specified fee. For example, if you set the fee code to apply for balances from \$0 to \$999.99, this fee is the only one applied to the account. You may want to accept the default, which is \$0 to \$10000000 (so as not to activate any other fee schedule columns).

[Percent]: Percentage to set as the fee for each money bucket for the specified account balance range. For example, if you type an amount of "25," all payments applied toward the Principal bucket generate a fee of 25 percent of the money collected.

- 3. In the **Alloc %** column, specify the percentage of the payment amount to allocate to each money bucket.
- 4. In the **PU**, **PC**, and **PA** column, select or clear the check boxes to indicate whether to include these payment types on client invoices.

Note: If you don't select at least one of these check boxes, the system displays a warning message. To continue without selecting a check box, click **OK**.

- 5. In the **Priority** column, specify the order in which to apply payments.
- 6. In the **To** column, do the following:
- a. Specify the beginning and ending account balance range in which to apply fees.
- b. Specify the percent to calculate as the fee for each money bucket.
 - 7. To set up subsequent account balance ranges, do the following:
 - Click the plus sign (+). The system inserts a column.
- a. Type the next account balance range to use for applying fees.
- b. Specify the percent to calculate as the fee for each money bucket.

Tip: To delete a "To" column, click the minus sign (-).

8. Click Save.

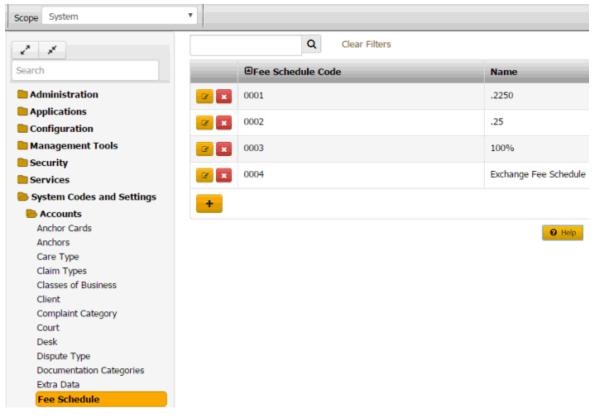
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Modify a Balance-Based Fee Schedule

Use the Fee Schedule dialog box to modify a balance-based fee schedule.

To modify a balance-based fee schedule

1. In the Navigation pane, click System Codes and Settings > Accounts > Fee Schedule.



2. Click the Edit icon. The Fee Schedule dialog box appears.

Fee Schedule

						0 To
Balance Based	Alloc%	PU	PC	PA	Priority	1000000
Principal	100	2			3	100
Interest	100				3	100
Collection Costs	100		•		4	0
Bad Check Chgs	100		•	•	2	0
Court Costs	100				5	0
Attorney Fees	100				6	0
Misc Costs	100				7	0
Available for use	100				8	0
Available for use	100	8	•		9	0
Fransaction Charges	100				1	0

Fee Schedule Code/Name: Number and name that identifies the fee schedule.

Close

[Money Buckets]: Repositories for amounts you want to record in Latitude.

Alloc %: (Allocation percent) Percentage of the payment amount to allocate to the money bucket. The amount available to allocate toward a money bucket is the remaining payment amount to allocate times the money bucket's allocation rate. When Latitude allocates all the money buckets and an amount to pay remains, Latitude allocates the remaining amount based on priority. If the balance in a money bucket is less than the allocation amount, the remaining allocation amount becomes available to allocate to other money buckets with a lower priority.

PU: (Paid Us) If selected, client invoices include the amounts shown or paid into the money bucket for this payment type.

PC: (Paid Client) If selected, client invoices include the amounts shown or paid into the money bucket for this payment type.

PA: (Paid Agency) If selected, client invoices include the amounts shown or paid into the money bucket for this payment type.

Priority: Order in which to apply payments to the corresponding money bucket. Latitude applies payments to the money bucket with a priority of "1" first. If there are funds remaining, the system applies the payment to the bucket set as priority 2. The system continues applying the payment until no funds remain or the account balance is zero. If the account has a balance after applying the full payment amount received, the system applies the next payment you receive to the highest priority bucket that has a balance remaining. Generally, you order the priority from 1 to 10, from top to bottom.

To: Account balance range in which to apply fees. The first **To** column is always active, and indicates the first (or only) account balance range to use for the specified fee. For example, if you set the fee code to apply for balances from \$0 to \$999.99, this fee is the only one applied to the account. You may want to accept the default, which is \$0 to \$100000000 (so as not to activate any other fee schedule columns).

[Percent]: Percentage to set as the fee for each money bucket for the specified account balance range. For example, if you type an amount of "25," all payments applied toward the Principal bucket generate a fee of 25 percent of the money collected.

- 3. In the **Alloc %** column, specify the percentage of the payment amount to allocate to each money bucket.
- 4. In the **PU**, **PC**, and **PA** column, select or clear the check boxes to indicate whether to include these payment types on client invoices.

Note: If you don't select at least one of these check boxes, the system displays a warning message. To continue without selecting a check box, click **OK**.

- 5. In the **Priority** column, specify the order in which to apply payments.
- 6. In the **To** column, do the following:
- a. Specify the beginning and ending account balance range in which to apply fees.
- b. Specify the percent to calculate as the fee for each money bucket.
 - 7. To set up subsequent account balance ranges, do the following:

- . Click the plus sign (+). The system inserts a column.
- a. Type the next account balance range to use for applying fees.
- b. Specify the percent to calculate as the fee for each money bucket.

Tip: To delete a "To" column, click the minus sign (-).

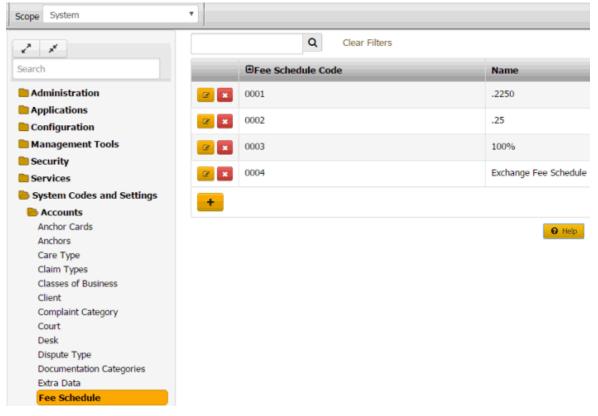
8. Click Save.

Delete a Fee Schedule

Use the **Fee Schedule** tab to delete a fee schedule.

To delete a fee schedule

1. In the Navigation pane, click System Codes and Settings > Accounts > Fee Schedule.



2. Click the Delete icon and then click Yes.

Hardship Types

Hardship Types

You can add, modify, and delete financial hardship types, such as unemployment, short-term illness, and reduced income. Users specify a hardship type when creating financial hardship cases. For more information, see Add a Care or Financial Hardship Case.

Add a Hardship Type

Use the Hardship Type panel to add a financial hardship type.

To add a hardship type

1. In the Navigation pane, click System Codes and Settings > Accounts > Hardship Type.

2 ×	Code Not in Hardship	Proof Required	On Hold Days	Description Not in Hardship	Created When 2014-08- 28T00:00:00Z	Modified When 2015-04- 15T14:34:562	Created By SYSTEM	Modifie By
×			0				SYSTEM	😧 Help
+								O Help
								🕑 Help

Code: Code that identifies the type of financial hardship.

Proof Required: If selected, your organization requires proof of the financial hardship.

On Hold Days: Default number of days to place the account on hold to suspend collection activity.

Description: Description of the hardship type.

Created When: Date and time a user created this hardship type.

Modified When: Date and time a user last modified this hardship type.

Created By: User who created this hardship type.

Modified By: User who last modified this hardship type.

- 2. Click the plus sign (+). A blank row appears in the data grid.
- 3. Complete the information and then click the check mark.

Modify a Hardship Type

Use the Hardship Type panel to modify a financial hardship type.

To modify a hardship type

1. In the Navigation pane, click System Codes and Settings > Accounts > Hardship Type.

Scope System	•								
Search		Code	Proof Required	On Hold Days	Description	Created When	Modified When	Created By	Modified By
Administration		Not in		0	Not in	2014-08-	2015-04-	SYSTEM	
Applications		Hardship			Hardship	28T00:00:00Z	15T14:34:56Z		
Configuration	×								
Management Tools	_								
Security	+								
Services									Help
bystem Codes and Settings									
Accounts									
Anchor Cards									
Anchors									
Care Type									
Claim Types									
Classes of Business									
Client									
Complaint Category									
Court									
Desk									
Dispute Type									
Documentation Categories									
Extra Data									
Fee Schedule									
Hardship Type									

Code: Code that identifies the type of financial hardship.

Proof Required: If selected, your organization requires proof of the financial hardship.

On Hold Days: Default number of days to place the account on hold to suspend collection activity.

Description: Description of the hardship type.

Created When: Date and time a user created this hardship type.

Modified When: Date and time a user last modified this hardship type.

Created By: User who created this hardship type.

Modified By: User who last modified this hardship type.

- 2. Click the Edit icon. The hardship type appears in edit mode.
- 3. Modify the information and then click the check mark.

Delete a Hardship Type

Use the **Hardship Type** panel to delete a financial hardship type.

To delete a hardship type

1. In the Navigation pane, click System Codes and Settings > Accounts > Hardship Type.

earch		Code	Proof Required	On Hold Days	Description	Created When	Modified When	Created By	Modifie By
Administration	CZ -	Not in		0	Not in	2014-08-	2015-04-	SYSTEM	
Applications		Hardship			Hardship	28T00:00:00Z	15T14:34:56Z		
Configuration	×								
Management Tools	_								
Security	+								
Services									O Help
System Codes and Settings									
Accounts									
Anchor Cards									
Anchors									
Care Type									
Claim Types									
Classes of Business									
Client									
Complaint Category									
Court									
Desk									
Dispute Type									
Documentation Categories									
Documentation categories									
Extra Data									

2. Click the Delete icon and then click **Yes**.

Legal Court Case Statuses

Legal Court Case Statuses

You can search for, add, modify, and delete court case statuses. Users specify a court case status when creating or maintaining legal cases. For more information, see Maintain General Legal Information.

Add a Court Case Status

Use the Legal Court Case Statuses panel to add a court case status.

To add a court case status

1. In the Navigation pane, click System Codes and Settings > Accounts > Legal Court Case Statuses.

Scope System	•		
2.1		Code	Description
Search Administration	x	ATTYR	Attorney Retained
Applications	x	DISCO	In Discovery
Configuration	8	DSMWP	Dismissed w/Prejudice
🛅 Security 🛅 Services	x	DSWOP	Dismissed wo/Prejudice
System Codes and Settings Accounts	x	FILED	Suit Filed
Anchor Cards Anchors	2 ×	JDGMT	Judgment
Care Type Claim Types	2 ×	POJAG	Post Judgment Agreement
Classes of Business Client	x	PRJAG	Pre Judgment Agreement
Complaint Category Court Desk	Z X	UNKNO	Unknown
Dispute Type Documentation Categories	+		
Extra Data Fee Schedule			🛛 Help
Hardship Type Legal Court Case Statuses			

2. Click the plus sign (+). A blank row appears in the data grid.

	Code	Description		
	ATTYR	Attorney Retained		
	DISCO	In Discovery		
	DSMWP	Dismissed w/Prejudice		
	DSWOP	Dismissed wo/Prejudice		
	FILED	Suit Filed		
	JDGMT	Judgment		
	POJAG	Post Judgment Agreement		
	PRJAG	Pre Judgment Agreement		
	UNKNO	Unknown		
× •	Code *	Description *		

3. In the **Code** box, type a unique code for the court case status.

- 4. In the **Description** box, type a description of the court case status.
- 5. Click the check mark.

Modify a Court Case Status

Use the Legal Court Case Statuses panel to modify a court case status.

To modify a court case status

1. In the Navigation pane, click System Codes and Settings > Accounts > Legal Court Case Statuses.

cope System	•		
		Code	Description
Administration	x	ATTYR	Attorney Retained
Applications	X	DISCO	In Discovery
Configuration			
Management Tools	- 2	DSMWP	Dismissed w/Prejudice
Security		DOWOD	Dismissed we/Desiration
Services	X	DSWOP	Dismissed wo/Prejudice
System Codes and Settings		FILED	Suit Filed
😑 Accounts	× ×	11220	Salernea
Anchor Cards		JDGMT	Judgment
Anchors	2 ×	50000	Judgmenc
Care Type	_	0034.0	5
Claim Types	2 ×	POJAG	Post Judgment Agreem
Classes of Business			
Client	X	PRJAG	Pre Judgment Agreeme
Complaint Category			
Court	- C- x	UNKNO	Unknown
Desk			
Dispute Type	+		
Documentation Categories			
Extra Data			O Help
Fee Schedule			U they
Hardship Type			
Legal Court Case Statuses			

2. Click the Edit icon. The court case status appears in edit mode.

	Code	Description
2	Code ATTYR	Description Attorney Retained
	DISCO	In Discovery
	DSMWP	Dismissed w/Prejudice
	DSWOP	Dismissed wo/Prejudice
	FILED	Suit Filed
	JDGMT	Judgment
	POJAG	Post Judgment Agreement
	PRJAG	Pre Judgment Agreement
	UNKNO	Unknown

3. Modify the information and then click the check mark.

Delete a Court Case Status

Use the Legal Court Case Statuses panel to delete a court case status.

To delete a court case status

1. In the Navigation pane, click System Codes and Settings > Accounts > Legal Court Case Statuses.

System Codes and Settings

1 1		Code	Description
earch	Z ×	ATTYR	Attorney Retained
Applications	×	DISCO	In Discovery
Configuration			
Management Tools	2	DSMWP	Dismissed w/Prejudice
Security		DSWOP	Dismissed wo/Prejudic
Services	× ×	DSWOP	Distriissed wo/Frejudio
System Codes and Settings		FILED	Suit Filed
🖻 Accounts 🗧	×	FILED	Suic Filed
Anchor Cards		JDGMT	Judgment
Anchors	3 ×	JUGMI	Judgmenic
Care Type			
Claim Types	2 ×	POJAG	Post Judgment Agreem
Classes of Business			
Client	3 ×	PRJAG	Pre Judgment Agreeme
Complaint Category			
Court	2 ×	UNKNO	Unknown
Desk			
Dispute Type	+		
Documentation Categories			
Extra Data			O Hel
Fee Schedule			
Hardship Type			
Legal Court Case Statuses			

2. Click the Delete icon and then click **Yes**.

Letter Types

Letter Types

You can search for, add, modify, and delete letter types. User-defined letters have no functionality associated to them and Latitude cannot determine 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.

Add a Letter Type

Use the Letter Types panel to add a letter type.

To add a letter type

1. In the Navigation pane, click System Codes and Settings > Accounts > Letter Types.

Scope System *			
1 1		Code	Description
Search	x	DUN	Dunning, Initial letter sent to the debtor. Letter generally contains balance and customer information.
Applications		SIF	Settlement, Letter offering settlement terms to the debtor.
Configuration			
Management Tools	C x	PIF	Payoff, Letter confirming payment of entire balance to the debtor.
Security			
Services	C 💌	PPA	Payment Reminder, Letter reminding debtor to send in a payment.
System Codes and Settings		PPS	Multi-Part Settlement, Letter confirming agreement with debtor to settle balance following a payment schedule.
b Accounts	Z ×	FFS	Mulo-Part Settlement, Letter commining agreement with debtor to settle balance following a payment schedule.
Anchor Cards		PDC	NITD, Notice of intent to deposit. Used to inform a debtor that a post-dated check or paper draft will be deposited by your agence
Anchors	x	100	Harby House of memory of deposite open to more a deptor one a post dated check of paper drate thin be deposited by your agen
Care Type		CUS	Customer Letter, Letter regarding the debtor, intended recipient is the customer.
Claim Types Classes of Business			
Classes of Busiliess		ATT	Attorney Letter, Letter containing debtor information to send to your agency's forwarding attorney.
Complaint Category			······································
Court	+		
Desk	-		
Dispute Type			O Helo
Documentation Categories			
Extra Data			
Fee Schedule			
Hardship Type			
Legal Court Case Statuses			
Letter Types			

2. Click the plus sign (+). A blank row appears in the data grid.

	Code	Description
	DUN	Dunning, Initial letter sent to the debtor. Letter generally contains balance and customer information.
	SIF	Settlement, Letter offering settlement terms to the debtor.
	PIF	Payoff, Letter confirming payment of entire balance to the debtor.
	PPA	Payment Reminder, Letter reminding debtor to send in a payment.
	PPS	Multi-Part Settlement, Letter confirming agreement with debtor to settle balance following a payment schedule.
	PDC	NITD, Notice of intent to deposit. Used to inform a debtor that a post-dated check or paper draft will be deposited by your agency.
	CUS	Customer Letter, Letter regarding the debtor, intended recipient is the customer.
	ATT	Attorney Letter, Letter containing debtor information to send to your agency's forwarding attorney.
× ~	Code *	Description *

3. Complete the information and then click the check mark.

Modify a Letter Type

Use the **Letter Types** panel to modify a letter type.

To modify a letter type

1. In the Navigation pane, click System Codes and Settings > Accounts > Letter Types.

System Codes and Settings

Scope System *			
1 1		Code	Description
Search	x	DUN	Dunning, Initial letter sent to the debtor. Letter generally contains balance and customer information.
Applications		SIF	Settlement, Letter offering settlement terms to the debtor.
Configuration			
Management Tools	x x	PIF	Payoff, Letter confirming payment of entire balance to the debtor.
Security			
Services	C 💌	PPA	Payment Reminder, Letter reminding debtor to send in a payment.
System Codes and Settings		PPS	Multi-Part Settlement, Letter confirming agreement with debtor to settle balance following a payment schedule.
b Accounts	Z ×	FFS	Mulo-Part Settlement, Letter commining agreement with debtor to settle balance following a payment schedule.
Anchor Cards		PDC	NITD, Notice of intent to deposit. Used to inform a debtor that a post-dated check or paper draft will be deposited by your agence
Anchors	x	100	Harby House of memory of deposite open to more a deptor one a post dated check of paper drate thin be deposited by your agen
Care Type		CUS	Customer Letter, Letter regarding the debtor, intended recipient is the customer.
Claim Types Classes of Business			
Classes of Busiliess		ATT	Attorney Letter, Letter containing debtor information to send to your agency's forwarding attorney.
Complaint Category			······································
Court	+		
Desk	-		
Dispute Type			O Helo
Documentation Categories			
Extra Data			
Fee Schedule			
Hardship Type			
Legal Court Case Statuses			
Letter Types			

2. Click the Edit icon. The letter type appears in edit mode.

	Code	Description
	DUN	Dunning, Initial letter sent to the debtor. Letter generally contains balance and customer information.
	SIF	Settlement, Letter offering settlement terms to the debtor.
	PIF	Payoff, Letter confirming payment of entire balance to the debtor.
	PPA	Payment Reminder, Letter reminding debtor to send in a payment.
	PPS	Multi-Part Settlement, Letter confirming agreement with debtor to settle balance following a payment schedule.
	PDC	NITD, Notice of intent to deposit. Used to inform a debtor that a post-dated check or paper draft will be deposited by your agency.
	CUS	Customer Letter, Letter regarding the debtor, intended recipient is the customer.
2 🗸	Code ATT	Description Attorney Letter, Letter con

3. Modify the information and then click the check mark.

Note: For system-level letter types, you cannot modify the code.

Delete a Letter Type

Use the Letter Types panel to delete a letter type. You cannot delete system-defined letter types.

To delete a letter type

1. In the Navigation pane, click System Codes and Settings > Accounts > Letter Types.

cope System •			
2 1		Code	Description
Search		DUN	Dunning, Initial letter sent to the debtor. Letter generally contains balance and customer information.
Administration			
Applications	🕑 🗙	SIF	Settlement, Letter offering settlement terms to the debtor.
Configuration			
Management Tools	3 x	PIF	Payoff, Letter confirming payment of entire balance to the debtor.
Security			
Services	Z ×	PPA	Payment Reminder, Letter reminding debtor to send in a payment.
System Codes and Settings		PPS	Multi-Part Settlement, Letter confirming agreement with debtor to settle balance following a payment schedule.
Accounts			nan far seteeneng seter conning ag conten nor ocaer to seter outline renorming a payment seteouter
Anchor Cards		PDC	NITD, Notice of intent to deposit. Used to inform a debtor that a post-dated check or paper draft will be deposited by your ager
Anchors	x	100	The produce of interverse deposited open and the deposited and a post dated check of paper and this be deposited of your ages
Care Type		CUS	Customer Letter, Letter regarding the debtor, intended recipient is the customer.
Claim Types	Z ×	003	Casomer Lever, Lever regarding the debtor, interfaced recipient is the casomer.
Classes of Business		ATT	Attorney Letter, Letter containing debtor information to send to your agency's forwarding attorney.
Client Complaint Category	x	ATT	Attorney Letter, Letter containing debtor information to send to your agency's forwarding attorney.
Court			
Desk	+		
Dispute Type			
Documentation Categories			O Hel
Extra Data			
Fee Schedule			
Hardship Type			
Legal Court Case Statuses			
Letter Types			

2. Click the Delete icon and then click **Yes**.

List Codes

List Codes

You can modify user-defined list codes and associate data to the list codes. You cannot add list codes or modify system-defined list codes. List codes allow your organization to specify data to use in related panels in Latitude.

Code	Display Name	Description	See
ADDRCNFSRC	Address Confirmation Source	Source who confirmed the validity of the address.	Add an AddressModify an Address
ADDRSRC	Address Source	Source who provided the address, such as customer, client, or credit bureau.	Add an AddressModify an Address
ADDRSTATUS	Address Status	Status of the address, such as good, bad, or unknown.	Add an AddressModify an Address
ADDRTYPE	Address Type	Type of address, such as home or work.	Add an AddressModify an Address

BKRREAMET	Bankruptcy Reaffirm Method		Maintain General Bankruptcy Information
BKRPTSTAT	Bankruptcy Status		Maintain General Bankruptcy Information
BKRSURMEA	Bankruptcy Surrender Method	How the customer surrendered the item (for example, shipped or picked up). Visible when the bankruptcy chapter is "7" and the bankruptcy method is "surrender."	Maintain General Bankruptcy Information
CBRACTSTAT	CBR Account Status	BCCOUNT SUCH as	View Credit Bureau Reportin Account Information
CBRACCTTYP	CBR Account Type		View Credit Bureau Reportin Account Information
CBRADDRIND	CBR Address Indicator	nome husiness or	View Credit Bureau Reportin Account Information
CBRCMPLCND	CBR Compliance Condition		View Credit Bureau Reportin Account Information
CBRCREDCLS	CBR Creditor Classes	_	View Credit Bureau Reportin Account Information

CBRECOACD	CBR ECOA Code	Equal Credit Opportunity Act code that identifies who is responsible for repayment of the debt, such as individual or joint.	View Credit Bureau Reporting Account Information
CBRINFOIND	CBR Information Indicator	Credit bureau consumer information indicator, such as reaffirmation of debt or petition for Chapter 7 bankruptcy.	View Credit Bureau Reporting Account Information
CBRPTFLTYP	CBR Portfolio Types	Code that identifies the portfolio to which the account belongs.	View Credit Bureau Reporting Account Information
CBRRESCD	CBR Residence Codes	Residence status, such as owns or rents.	View Credit Bureau Reporting Account Information
CBRSPECCMT	CBR Special Comment	Code that identifies a note about the account, such as "debt paid through insurance."	View Credit Bureau Reporting Account Information
CBRTRNSTYP	CBR Transaction Type	Code that identifies the type of account transaction, along with a description.	View Credit Bureau Reporting Account Information
COMPLTAGST	Complaint Against	Category for who or what the complaint is against, such as third party, branch, department, or user.	Add a ComplaintModify a Complaint
COMPLTJST	Complaint Justified	Indicates whether the complaint is justified.	Add a ComplaintModify a Complaint
COMPLTOUT	Complaint Outcome	Outcome of the complaint, such as training required or disciplinary action.	Add a ComplaintModify a Complaint

COMPLTROOT	Complaint Root Cause	Root cause of the complaint.	Add a ComplaintModify a Complaint
COMPLTSTAT	Complaint Status	Status of the complaint.	Add a ComplaintModify a Complaint
COMPLTTYPE	Complaint Type	Type of complaint, such as human or system error.	Add a ComplaintModify a Complaint
COND	Condition	Condition of the vehicle when the agent repossessed it.	Maintain Repossession Information
DISPUTEAGT	Dispute Against	Person that the dispute is against, such as client or third party.	Add a DisputeModify a Dispute
DISPUTECAT	Dispute Category	Dispute category, such as fraud or wrong trace.	Add a DisputeModify a Dispute
DISPUTEJST	Dispute Justified	Indicates whether the dispute is justified.	Add a DisputeModify a Dispute
DISPUTEOUT	Dispute Outcome	Outcome of the dispute, such as account on hold or unable to resolve.	Add a DisputeModify a Dispute
DISPUTEREF	Dispute Referred By	Person who referred the dispute, such as a third party or the client.	Add a DisputeModify a Dispute
EMADDRTYPE	Email Address Type	Type of email address, such as home or work.	 Add an Email Address Modify an Email Address
GENDER	Gender	Person's gender.	 Maintain Contact Information Add an Insurance Policy Modify an Insurance Policy

REINLIPOInternal Lien PositionYour organization's position in line in regard to benefitting from collateral liquidation.Maintain Real Estate CollateralLEASEREPOLease End RepoIndicates whether the ease ended or the agent repossessed the vehicle.Maintain Repossession nformationMARITLSTATMarital StatusPatient's marital status.• Add Patient Information • Modify Patient InformationORDTYPOrder TypeRepossession order type.Maintain Repossession nformationORDTYPOther Lien Holder PositionPosition in line of other benefitting from collateral liquidation.Maintain Repossession nformationREOTLIPOOther Lien Holder PositionPerson's name prefix.• Maintain Real Estate CollateralPREFIXPrefixPrefixPerson's name prefix.• Maintain Contact Information • Add a Party to an AccountREPROTYPProperty TypeType of property, such as single family residence or raw land.Maintain Real Estate CollateralREPROVACProperty VacantProperty occupancy, such as vacant or occupied.Maintain Real Estate CollateralRDNCLOREARDN Close ReasonReason for closing the case.Close an RDN Case				
REINLIPO Internal Lien Position position in line in regard to benefitting from collateral liquidation. Maintain Real Estate Collateral C	INSCATEG	Insurance Category	example, primary or	PolicyModify an Insurance
LEASEREPOLease End Repoease ended or the agent repossessed the vehicle.Maintain Repossession informationMARITLSTATMarital StatusPatient's marital status.• Add Patient InformationORDTYPOrder TypeRepossession order type.Maintain Repossession InformationORDTYPOrder TypeRepossession order type.Maintain Repossession InformationREOTLIPOOther Lien Holder PositionPosition in line of other ien holders in regard to benefitting from collateral liquidation.Maintain Real Estate CollateralPREFIXPrefixPrefixPerson's name prefix. as single family residence or raw land.• Maintain Real Estate CollateralREPROTYPProperty TypeType of property, such as single family residence or raw land.Maintain Real Estate CollateralREPROVACProperty VacantProperty occupancy, such as vacant or occupied.Maintain Real Estate CollateralRDNCLOREARDN Close ReasonReason for closing the case.Close an RDN Case	REINLIPO	Internal Lien Position	position in line in regard to benefitting from	
MARITLSTATMarital StatusPatient's marital status.Information Modify Patient InformationORDTYPOrder TypeRepossession order type.Maintain Repossession nformationREOTLIPOOther Lien Holder PositionPosition in line of other benefitting from collateral liquidation.Maintain Real Estate CollateralPREFIXPrefixPrefixPerson's name prefix. a single family residence or raw land.• Maintain Real Estate CollateralREPROTYPProperty TypeType of property, such as single family residence or raw land.Maintain Real Estate CollateralREPROVACProperty VacantProperty occupancy, such as vacant or occupied.Maintain Real Estate CollateralRDNCLOREARDN Close ReasonReason for closing the case.Close an RDN Case	LEASEREPO	Lease End Repo	lease ended or the agent	-
ORDITYPOrder Typetype.InformationREOTLIPOOther Lien Holder PositionPosition in line of other lien holders in regard to benefitting from collateral liquidation.Maintain Real Estate CollateralPREFIXPrefixPrefixPerson's name prefix.• Maintain Contact Information • Add a Party to an AccountREPROTYPProperty TypeType of property, such as single family residence or raw land.Maintain Real Estate CollateralREPROVACProperty VacantProperty occupancy, such as vacant or occupied.Maintain Real Estate CollateralRDNCLOREARDN Close ReasonReason for closing the case.Close an RDN Case	MARITLSTAT	Marital Status	Patient's marital status.	Information Modify Patient
REOTLIPOOther Lien Holder Positionlien holders in regard to benefitting from collateral liquidation.Maintain Real Estate CollateralPREFIXPrefixPerson's name prefix.• Maintain Contact Information • Add a Party to an AccountREPROTYPProperty TypeType of property, such as single family residence or raw land.Maintain Real Estate CollateralREPROVACProperty VacantProperty occupancy, such as vacant or occupied.Maintain Real Estate CollateralRDNCLOREARDN Close ReasonReason for closing the case.Close an RDN Case	ORDTYP	Order Type		-
PREFIXPrefixPerson's name prefix.Information · Add a Party to an AccountREPROTYPProperty TypeType of property, such as single family residence or raw land.Maintain Real Estate CollateralREPROVACProperty VacantProperty occupancy, such as vacant or occupied.Maintain Real Estate CollateralRDNCLOREARDN Close ReasonReason for closing the case.Close an RDN Case	REOTLIPO	Other Lien Holder Position	lien holders in regard to benefitting from	
REPROTYPProperty Typeas single family residence or raw land.Maintain Real Estate CollateralREPROVACProperty VacantProperty occupancy, such as vacant or 	PREFIX	Prefix	Person's name prefix.	InformationAdd a Party to an
REPROVAC Property Vacant such as vacant or occupied. Maintain Real Estate RDNCLOREA RDN Close Reason Reason for closing the case. Close an RDN Case	REPROTYP	Property Type	as single family	
RDNCLOREA RDN Close Reason case.	REPROVAC	Property Vacant	such as vacant or	
	RDNCLOREA	RDN Close Reason	-	Close an RDN Case
Nondistre Non disposition type IN/A IN/A	RDNDISTYP	RDN Disposition Type	N/A	N/A

RDNHOLREA	RDN Hold Reason	Reason for placing the case on hold.	Place an RDN Case on Hold
RDNKEYTYP	RDN Key Type	Type of ignition key, such as single or double cut.	Maintain Vehicle Collateral Information
RDNODOTYP	RDN Odometer Type	//*********	Maintain Vehicle Collateral Information
RDNORDTYP	RDN Order Type	Type of order requested, such as vehicle transport or repossession	Create an RDN Case
RDNOVECON	RDN Overall Condition	N/A	N/A
RDNSTATYP	RDN Status Type	N/A	N/A
RDNUPDPRI	RDN Update Priority	Urgency of the update for the recovery agent or agency.	Send a Case Update to RDN
RDNUPDTYP	RDN Update Types	Type of update to send to RDN, such as account closed or address update.	Send a Case Update to RDN
REFERREDBY	Referred By	Person who referred the complaint or dispute, such as third party, client, or user.	 Add a Complaint Modify a Complaint Add a Dispute Modify a Dispute
RELEASED	Released	Method of releasing the collateral.	Maintain Repossession Information
REPLSTAT	Replevin Status	Status of the recovery	Maintain Vehicle Collateral Information
REPOACT	Repo Action		Maintain Repossession Information
SRCPUBC	Source Publication	Source from which your organization obtained the appraisal (for	Add an AppraisalModify an Appraisal

		example, Kelley Blue Book).			
STATE	State	N/A	N/A		
STAT	Status	Status of the vehicle repossession.	Maintain Repossession Information		
RESTATUS	Status	Current status of the property.	Maintain Real Estate Collateral		
SUFFIX	Suffix	Person's name suffix.	 Maintain Contact Information Add a Party to an Account 		
TITLEPOS	Title Position	Type of title (for example, original, duplicate).	Maintain Vehicle Collateral Information		
RETYOSAL	Type of Sale	Indicates whether the foreclosure sale is judicial (through a court process) or non-judicial (without a court's involvement).	Maintain Real Estate Collateral		

Modify a List Code

Use the List Data panel to modify a custom list code. You cannot modify system-defined list codes.

To modify a list code

1. In the Navigation pane, click System Codes and Settings > Accounts > List Data.

Scope System	•			
2.1	ADDRCNFSRC - Address Confirmation Source			
Search	ADDRSRC - Address Source			
Administration	ADDRSTATUS - Address Status			
Applications Configuration	ADDRTYPE - Address Type			
Management Tools	CBRACTSTAT - CBR Account Status			
Security	CBRACCTTYP - CBR Account Type			
System Codes and Settings	CBRADDRIND - CBR Address Indicator			
Accounts Anchor Cards	CBRCMPLCND - CBR Complaint Condition			
Anchors Care Type	CBRCREDCLS - CBR Creditor Classes			
Claim Types	CBRECOACD - CBR ECOA Code			
Classes of Business Client	CBRINFOIND - CBR Information Indicator			
Complaint Category Court	CBRPTFLTYP - CBR Portfolio Types			
Desk Dispute Type	CBRRESCD - CBR Residence Codes			
Documentation Categories Extra Data	CBRSPECCMT - CBR Special Comment			
Fee Schedule	COMPLTAGST - Complaint Against			
Hardship Type Legal Court Case Statuses	Previous 1 2 Next			
Letter Types List Data	Help			

2. Click the list code to modify. The list code expands.

ADDRSRC - Addres	ss Source								
List Code	ADDRSRC								
Namespace	SYSTEM	TEM							
Display Name	Address So	Address Source							
Description	Address So	Address Source							
Code is Numeric									
Code Length Max	10	10							
Description Length	Max 50	50							
Add New List	Data +								
Id	Code	Description			Enabled	SysCode			
14	CALLCREDIT	Call Credit				2			
	Save								

List Code: Unique code that identifies the custom list.

Namespace: Alternate name for the custom list.

Display Name: Name of the custom list. This name appears when displaying the list in a custom panel.

Description: A description of the custom list.

Code is Numeric: If selected, the list data identifier is numeric. If cleared, the list data identifier is alphanumeric.

Code Length Max: Maximum number of characters allowed for the list data identifier.

Description Length Max: Maximum number of characters allowed for the list data description.

3. Modify the information and then click **Save**.

Add List Data

Use the List Data panel to add data to a custom list.

To add list data

1. In the Navigation pane, click System Codes and Settings > Accounts > List Data.

Scope System	•
2.1	ADDRCNFSRC - Address Confirmation Source
Search	ADDRSRC - Address Source
Administration	ADDRSTATUS - Address Status
Applications Configuration	ADDRTYPE - Address Type
Management Tools	CBRACTSTAT - CBR Account Status
Security	CBRACCTTYP - CBR Account Type
System Codes and Settings	CBRADDRIND - CBR Address Indicator
Accounts Anchor Cards	CBRCMPLCND - CBR Complaint Condition
Anchors Care Type	CBRCREDCLS - CBR Creditor Classes
Claim Types Classes of Business	CBRECOACD - CBR ECOA Code
Client	CBRINFOIND - CBR Information Indicator
Complaint Category Court	CBRPTFLTYP - CBR Portfolio Types
Desk Dispute Type	CBRRESCD - CBR Residence Codes
Documentation Categories Extra Data	CBRSPECCMT - CBR Special Comment
Fee Schedule Hardship Type	COMPLTAGST - Complaint Against
Legal Court Case Statuses Letter Types	Previous 1 2 Next
List Data	O Help

2. Click the list code to which to add list data. The list code expands.

ADDRSRC - Addre	ess Source						
List Code	ADDRSRC						
Namespace SYSTEM							
Display Name Address Source							
Description	Description Address Source						
Code is Numeric							
Code Length Max	10						
Description Length	h Max 50						
Add New List	t Data 🕂						
Id	Code	Description			Enabled	SysCode	
14	CALLCREDIT	Call Credit			æ.	2	
	Save						

3. Next to Add New List Data, click the plus sign (+). A blank row appears in the data grid.

Id	Code	Description	Enabled	SysCode	_
144	Home	Home			Edit
173	Other	Other		2	
214	Work	Work		2	
	Fill Code	Fill Description			Done Cance

ID: Code that the system assigns to identify the custom list data.

Code: Code that you assign to identify the custom list data. The system limits the maximum number of characters allowed to what is set as the **Code Length Max** in the List Code section.

Description: Description of the custom list data. The system limits the maximum number of characters allowed to what is set as the **Description Length Max** in the List Code section.

Enabled: If selected, you want the custom list data to appear on a custom panel. You cannot delete list data; however, you can clear this check box so that the data doesn't appear on a custom panel.

SysCode: If selected, all list data that you add to this custom list is system-defined. If cleared, the list data is user-defined. Users cannot select or clear this check box.

- 4. Complete the information and then click **Done**.
- 5. Click **Save**. The system assigns an ID to the list data item.

Modify List Data

Use the List Data panel to modify data in a custom list. You cannot modify system-defined list data.

To modify list data4

1. In the Navigation pane, click System Codes and Settings > Accounts > List Data.

Scope System	•				
11	ADDRCNFSRC - Address Confirmation Source				
Search	ADDRSRC - Address Source				
Administration	ADDRSTATUS - Address Status				
Configuration	ADDRTYPE - Address Type				
Management Tools	CBRACTSTAT - CBR Account Status				
Security	CBRACCTTYP - CBR Account Type				
System Codes and Settings	CBRADDRIND - CBR Address Indicator				
Accounts Anchor Cards	CBRCMPLCND - CBR Complaint Condition				
Anchors Care Type	CBRCREDCLS - CBR Creditor Classes				
Claim Types Classes of Business	CBRECOACD - CBR ECOA Code				
Client	CBRINFOIND - CBR Information Indicator				
Complaint Category Court	CBRPTFLTYP - CBR Portfolio Types				
Desk Dispute Type	CBRRESCD - CBR Residence Codes				
Documentation Categories Extra Data	CBRSPECCMT - CBR Special Comment				
Fee Schedule	COMPLTAGST - Complaint Against				
Hardship Type Legal Court Case Statuses Letter Types	Previous 1 2 Next				
List Data	O Help				

2. Click the list code to modify. The list code expands.

ADDRSRC - Addres	ss Source								
List Code	ADDRSRC								
Namespace	SYSTEM	SYSTEM							
Display Name	Display Name Address Source								
Description	Address So	urce							
Code is Numeric									
Code Length Max	10								
Description Length	Max 50								
Add New List	Data +								
Id	Code	Description			Enabled	SysCode			
14	CALLCREDIT	Call Credit				2			
	Save								

3. In the data grid, click **Edit**. The data grid appears in edit mode.

Id	Code	Description	Enabled	SysCode	
144	Home	Home			Edit
173	Other	Other		ø	
214	Work	Work		2	
					Edit
233	233 Personal	nal Personal			Done
					Cance

ID: Code that the system assigns to identify the custom list data.

Code: Code that you assign to identify the custom list data. The system limits the maximum number of characters allowed to what is set as the **Code Length Max** in the List Code section.

Description: Description of the custom list data. The system limits the maximum number of characters allowed to what is set as the **Description Length Max** in the List Code section.

Enabled: If selected, you want the custom list data to appear on a custom panel. You cannot delete list data; however, you can clear this check box so that the data doesn't appear on a custom panel.

SysCode: If selected, all list data that you add to this custom list is system-defined. If cleared, the list data is user-defined. Users cannot select or clear this check box.

- 4. Modify the information and then click **Done**.
- 5. Click Save.

Manual Process Stages

Manual Process Stages

You can flag processes as either manual or automated. For more information, see Processes and Stages.

Flag a Process as Manual or Automated

Use the Manual Process Stages panel to flag a process as manual or automated.

To flag a process as manual or automated

1. In the Navigation pane, click System Codes and Settings > Accounts > Manual Process Stages.

Administration	Name	Description	Is Manual?
Applications	Account Process	Account process description	
Configuration			
Management Tools			0
Security			
System Codes and Settings			
b Accounts			
Anchor Card			
Anchor Card Configuration			
Claim Types			
Classes of Business			
Desk			
Documentation Categories			
Extra Data			
Legal Court Case Statuses			
Letter Types			

2. Click the Edit icon. The process appears in edit mode.

Name	Description	Is Manual?
Account Process	Account process description	

Is Manual: If selected, the process is manual. Users move the process to subsequent stages manually. If cleared, the process is automated. The system moves the process to subsequent stages automatically, based on the stage order set for the process.

3. Select or clear the check box and then click the check mark.

Note Action Codes

Note Action Codes

You can search for, add, modify, and delete action codes. Action codes represent the actions a user took on an account. When working an account, a user selects the action code that represents the action the user took on the account and Latitude records the action in the account notes. These codes are available on certain reports. Latitude releases with several standard action codes.

Note: Some Latitude system processes require specific codes. For more information, see Action and Result Codes.

Add a Note Action Code

Use the **Note Actions** panel to add an action code for notes.

To add an action code

1. In the Navigation pane, click System Codes and Settings > Accounts > Note Actions.

1 1		Code	Description	Consider Attempted	Consider Worked
Parch	x	AT	ATTORNEY TELEPHONED		
Administration					
Applications	8 ×	CO	COMMENT ONLY		
Configuration					
Management Tools	2 ×	DT	DEBTOR TELEPHONED OFFICE		
Security					
Services	2 ×	RL	RECEIVED LETTER		
System Codes and Settings		T 4	TELEPHONED ATTORNEY		
Accounts	☑ ×	ТА	TELEPHONED ATTORNEY		
Anchor Cards	_	тс	TELEPHONED CLIENT	~	~
Anchors	x	ic.	TELEPHONED CLIENT		Ø
Care Type		TE	TELEPHONED EMPLOYER	F	21
Claim Types	K	16	TELEPHONED EMPLOTER	1	10
Classes of Business Client		TI	TELEPHONED INFORMATION	Ø	
Complaint Category	*		TELETHONED INFORMATION	₩.	
Court		то	TELEPHONED OTHER	V	
Desk		10		(H)	
Dispute Type		TR	TELEPHONED RESIDENCE	[√]	121
Documentation Categories					<u>w</u>
Extra Data	+				
Fee Schedule					
Hardship Type					Ø Help
Legal Court Case Statuses					G Help
Letter Types List Data					
Manual Process Stages					

2. Click the plus sign (+). A blank row appears in the data grid.

	Code	Description	Consider Attempted	Consider Worked
	AT	ATTORNEY TELEPHONED		
	со	COMMENT ONLY		
	DT	DEBTOR TELEPHONED OFFICE		
	RL	RECEIVED LETTER		
	ТА	TELEPHONED ATTORNEY		
	тс	TELEPHONED CLIENT	2	
	ТЕ	TELEPHONED EMPLOYER	Ø	9
	ТІ	TELEPHONED INFORMATION	Ø	
	то	TELEPHONED OTHER	Ø	
	TR	TELEPHONED RESIDENCE	Ø	
× ~	Code *	Description *	Consider Attempted	Consider Worked

Code: Unique code that identifies the action.

Description: Description of the action.

Consider as attempted: If selected, the action code signifies an attempt at working the account.

Consider as worked: If selected, the action code signifies a worked account.

3. Complete the information and then click the check mark.

Modify a Note Action Code

Use the **Note Actions** panel to modify an action code.

To modify an action code

1. In the Navigation pane, click System Codes and Settings > Accounts > Note Actions.

icope System	•				
1 1		Code	Description	Consider Attempted	Consider Worked
Search		AT	ATTORNEY TELEPHONED		U
Administration					
Applications	x x	CO	COMMENT ONLY		
Configuration					
Management Tools	- 2 x	DT	DEBTOR TELEPHONED OFFICE		
Security					
Services	2 ×	RL	RECEIVED LETTER		
System Codes and Settings		ТА	TELEPHONED ATTORNEY		
Accounts	x	TA .	TELEPHONED ATTORNET		
Anchor Cards		тс	TELEPHONED CLIENT	T 20	-
Anchors	x		TELEPHONED CLIENT	₽.	Ø
Care Type		TE	TELEPHONED EMPLOYER	Ø	2
Claim Types	K	16	TELEPHONED EMPLOTER	1	<u>M</u>
Classes of Business Client		TI	TELEPHONED INFORMATION	e	
Complaint Category	*		TELEPHONED INFORMATION	1	
Court		то	TELEPHONED OTHER	R	
Desk	K	10	TELEPHONED OTHER	1	
Dispute Type		TR	TELEPHONED RESIDENCE	×	2
Documentation Categories	2	TR.	TELEPHONED RESIDENCE	<u>w</u>	197) 1
Extra Data					
Fee Schedule	+				
Hardship Type					
Legal Court Case Statuses					O Help
Letter Types					
List Data					
Manual Process Stages					
Note Actions					

Consider as attempted: If selected, indicates that the action code signifies an attempt at working the account.

Consider as worked: If selected, indicates that the action code signifies a worked account.

2. Click the Edit icon. The action code appears in edit mode.

	Code	Description	Consider Attempted	Consider Worked
2	Code AT	Description ATTORNEY TELEPHONED	Consider Attempted	Consider Worked
	со	COMMENT ONLY		
	DT	DEBTOR TELEPHONED OFFICE		
	RL	RECEIVED LETTER		
	ТА	TELEPHONED ATTORNEY		
	тс	TELEPHONED CLIENT	Ø	Ø
	TE	TELEPHONED EMPLOYER		Ø.
	ті	TELEPHONED INFORMATION	ø	
	то	TELEPHONED OTHER		
	TR	TELEPHONED RESIDENCE	Ø	Ø

Code: Unique code that identifies the action.

Description: Description of the action.

Consider as attempted: If selected, the action code signifies an attempt at working the account.

Consider as worked: If selected, the action code signifies a worked account.

3. Modify the information and then click the check mark.

Delete a Note Action Code

Use the **Note Actions** panel to delete an action code.

To delete an action code

1. In the Navigation pane, click System Codes and Settings > Accounts > Note Actions.

Administration Applications Configuration Management Tools	×	AT CO	ATTORNEY TELEPHONED		
Applications 2 Configuration 4 Management Tools 2	×	co			
Configuration Management Tools			COMMENT ONLY		
Management Tools					
	×	DT	DEBTOR TELEPHONED OFFICE		
Security	=				
Services	×	RL	RECEIVED LETTER		
System Codes and Settings		ТА	TELEPHONED ATTORNEY		
Accounts	×	10			
Anchor Cards	×	тс	TELEPHONED CLIENT	4	2
Anchors Care Type					
Claim Types	×	TE	TELEPHONED EMPLOYER	ø	1
Classes of Business	کنند ا				
Client	×	TI	TELEPHONED INFORMATION	Ø	
Complaint Category	-				
Court	×	то	TELEPHONED OTHER	Ø.	
Desk Dispute Type	_				
Documentation Categories	×	TR	TELEPHONED RESIDENCE	£	1
Extra Data					
Fee Schedule +					
Hardship Type					
Legal Court Case Statuses					Help
Letter Types					

2. Click the Delete icon and then click **Yes**.

Note Result Codes

Note Result Codes

You can search for, add, modify, and delete result codes. Result codes represent the results of an action a user took on an account. When working an account, a user selects the result code that represents the result of an action the user took on the account. Latitude records the result in the account notes. Latitude uses result codes to count the number of accounts that each user worked and contacted.

Latitude releases with several standard result codes.

Note: Some Latitude system processes require specific result codes. For more information about system-utilized codes, see Action and Result Codes.

Add a Note Result Code

Use the **Result Code Properties** dialog box to add a result code.

To add a result code

1. In the Navigation pane, click System Codes and Settings > Accounts > Note Results.

cope System	•		
1 1		Result Code	Description
Search		АМ	LEFT MESSAGE ANSWERING MACHIN
Administration			
Applications	8 ×	CO	COMMENT ONLY
Configuration			
Management Tools	2 ×	DH	Debtor Hung Up On
Security			
Services	☑ ×	DK	DIDNT KNOW
System Codes and Settings		HU	Hung up on
b Accounts			
Anchor Cards		LB	LINE BUSY
Anchors			
Care Type Claim Types	X	LM	LEFT MESSAGE
Classes of Business			
Client	Z X	LR	LEFT MESS ON RECORDER
Complaint Category			
Court		LV	LEFT MESS VOICE MAIL
Desk			
Dispute Type		NA	NO ANSWER
Documentation Categories			
Extra Data Fee Schedule	C x	NH	NO HELP
Hardship Type			
Legal Court Case Statuses	2 ×	NI	NOT IN
Letter Types			
List Data	Z ×	NL	NO LISTING
Manual Process Stages			
Note Actions	x	NP	NON PUB
Note Results			
Process Stages Queue Levels	+		O Help

2. Click the plus sign (+). The **Result Code Properties** dialog box appears.

Result Code	
Code	
Description	
Description	• •••
Quick Note Text	Quick Note Text
Options	Consider As Worked
	Consider As Contacted

Result Code: Unique (up to) five-character code that identifies an event.

Description: Description of the result code.

Quick Note Text: Default information to appear in the note. When users create a note using this result code, they can modify the quick note text.

Consider As Worked: If selected, the result code signifies a worked account.

Consider As Contacted: If selected, the result code signifies a contacted account.

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

Modify a Note Result Code

Use the **Result Code Properties** dialog box to modify a result code.

To modify a result code

1. In the Navigation pane, click System Codes and Settings > Accounts > Note Results.

Scope System	•		
11	_	Result Code	Description
Search		AM	LEFT MESSAGE ANSWERING MACHINE
Administration			
Applications	x	CO	COMMENT ONLY
Configuration			
Management Tools	☑ ×	DH	Debtor Hung Up On
Security		DK	DIDNT KNOW
Services	2 ×	DK	DIDNT KNOW
👺 System Codes and Settings		HU	Hung up on
🐸 Accounts			
Anchor Cards		LB	LINE BUSY
Anchors Care Type			
Claim Types	🕜 🗙	LM	LEFT MESSAGE
Classes of Business			
Client	🕝 🗙	LR	LEFT MESS ON RECORDER
Complaint Category			
Court Desk	x	LV	LEFT MESS VOICE MAIL
Dispute Type			
Documentation Categories	*	NA	NO ANSWER
Extra Data		NH	NO HELP
Fee Schedule	× ×	NH	NOTIED
Hardship Type		NI	NOT IN
Legal Court Case Statuses Letter Types			
List Data		NL	NO LISTING
Manual Process Stages			
Note Actions	C x	NP	NON PUB
Note Results			
Process Stages	+		O Help
Queue Levels			

2. Click the Edit icon. The **Result Code Properties** dialog box appears.

Result Code		
Code	······································	
Description		
Description		
Quick Note Text		
	Quick Note Text	
	Quick note Text	
Options	Consider As Worked	
Options		

Result Code: Unique (up to) five-character code that identifies an event.

Description: Description of the result code.

Quick Note Text: Default information to appear in the note. When users create a note using this result code, they can modify the quick note text.

Consider As Worked: If selected, the result code signifies a worked account.

Consider As Contacted: If selected, the result code signifies a contacted account.

3. Modify the information and then click **Save**.

Delete a Note Result Code

Use the **Note Results** panel to delete a result code.

To delete a result code

1. In the Navigation pane, click System Codes and Settings > Accounts > Note Results.

Administration Applications Configuration Management Tools Security Services	AM CO DH DK	LEFT MESSAGE ANSWERING MACHIN COMMENT ONLY Debtor Hung Up On DIDNT KNOW
Applications Configuration Management Tools Security	DH	Debtor Hung Up On
Configuration Management Tools Security	DH	Debtor Hung Up On
Management Tools		
Security		
	DK	DIDNT KNOW
Services Z ×	DK	DIDNT KNOW
		DIDN'I KNOW
System Codes and Settings	HU	Hung up on
Accounts		
Anchor Cards	LB	LINE BUSY
Anchors		
Care Type Claim Types	LM	LEFT MESSAGE
Classes of Business		
Client Z	LR	LEFT MESS ON RECORDER
Complaint Category		
Court	LV	LEFT MESS VOICE MAIL
Desk		
Dispute Type	NA	NO ANSWER
Documentation Categories		
Extra Data	NH	NO HELP
Fee Schedule		
Hardship Type Legal Court Case Statuses	NI	NOT IN
Letter Types		
List Data	NL	NO LISTING
Manual Process Stages		
Note Actions	NP	NON PUB
Note Results		

2. Click the Delete icon and then click **Yes**.

Process Stages

Process Stages

You can add, modify, and delete processes and their stages. For more information, see Processes and Stages.

Add a Process

Use the **Process Stages** panel to add a process.

To add a process

1. In the Navigation pane, click System Codes and Settings > Accounts > Process Stages.

Scope System	Ŧ	
	+	
2 1		
Search	× Account Process	
Administration	_	O Help
Applications		
Configuration		
Management Tools		
Security		
Services		
System Codes and Settings		
Accounts		
Anchor Cards		
Anchors		
Care Type		
Claim Types		
Classes of Business		
Client		
Complaint Category		
Court		
Desk		
Dispute Type		
Documentation Categories		
Extra Data		
Fee Schedule		
Hardship Type		
Legal Court Case Statuses		
Letter Types		
List Data		
Manual Process Stages		
Note Actions		
Note Results		
Process Starles		

2. Click the plus sign (+). The panel appears in add mode.

+				
Cancel New Process				
Types			•	
Name	New Proce	55		
Description	New Descr	iption		
Start Process		,	•	
Stages	Id	Name	Description	Is End
				Done
				Cancel
Save				

Types: Type of process.

Name: Name of process.

Description: Description of process.

Start Process: Stage at which to start the process.

Stages

ID: Code that the system assigns to identify the stage.

Name: Name of the stage.

Description: Description of the stage.

Is End: If selected, this stage is the last stage in the process.

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

Note: For information about adding a stage to the process, see Add a Stage to a Process.

Modify a Process

Use the **Process Stages** panel to modify a process.

To modify a process

1. In the Navigation pane, click System Codes and Settings > Accounts > Process Stages.

Scope System	T	
2 1	+	
	Account Deserves	
Search	Account Process	
Administration		Help
Applications		
Configuration		
Management Tools		
Security		
Services		
System Codes and Settings		
Accounts		
Anchor Cards		
Anchors		
Care Type		
Claim Types		
Classes of Business		
Client		
Complaint Category		
Court		
Desk		
Dispute Type		
Documentation Categories		
Extra Data		
Fee Schedule		
Hardship Type		
Legal Court Case Statuses		
Letter Types		
List Data		
Manual Process Stages		
Note Actions		
Note Results		
Process Stages		

2. Click the process to modify. The process expands.

+					
× Account Process					
Name	Account Proc	ess			
Description	Process Des	scription			
Start Process		,	,		
Stages	+				
	Id	Name	Description	Is End	
	1	Stage1	Stage 1		Edit
					Delete
Save					
Save					

Name: Name of process.

Description: Description of process.

Start Process: Stage at which to start the process.

Stages

ID: Code that the system assigns to identify the stage.

Name: Name of the stage.

Description: Description of the stage.

Is End: If selected, this stage is the last stage in the process.

3. Modify the information and then click **Save**.

Note: For information about adding or modifying a stage, see Add a Stage to a Process.

Delete a Process

Use the **Process Stages** panel to delete a process.

To delete a process

1. In the Navigation pane, click System Codes and Settings > Accounts > Process Stages.

Scope System *
Search Account Process
Administration O Help
Applications
Configuration
Management Tools
Security
Services
System Codes and Settings
Anchor Cards
Anchor Cards Anchors
Care Type
Claim Types Classes of Business
Client
Complaint Category
Court
Desk
Dispute Type
Documentation Categories
Extra Data
Fee Schedule
Hardship Type
Legal Court Case Statuses
Letter Types
List Data
Manual Process Stages
Note Actions
Note Results
Process Stages

2. Click the Delete icon and then click **Yes**.

Add a Stage to a Process

Use the **Process Stages** panel to add a stage to a process.

To add a stage to a process

1. In the Navigation pane, click System Codes and Settings > Accounts > Process Stages.

Scope System	
2 /	
Search 🛛 🗙 A	Account Process
Administration	O Help
Applications	
Configuration	
Management Tools	
Security	
Services	
System Codes and Settings	
Accounts	
Anchor Cards	
Anchors	
Care Type	
Claim Types	
Classes of Business	
Client	
Complaint Category	
Court	
Desk	
Dispute Type	
Documentation Categories	
Extra Data	
Fee Schedule	
Hardship Type	
Legal Court Case Statuses	
Letter Types	
List Data	
Manual Process Stages	
Note Actions Note Results	
Process Stages	

2. Click the process to which to add a stage. The process expands.

Account Proc	ess			
Account Proc	ess			
Process Des	cription			
-				
+				
Id	Name	Description	Is End	
1	Stage1	Stage 1		Edit
				Delete
		+ Id Name	Id Name Description	+ Id Name Description Is End

3. Next to Stages, click the plus sign (+). A blank row appears in the data grid.

+						
× Account Process						
Name	Account Pr	ocess				
Description	Process D	Process Description				
Start Process		•	•			
Stage	-					
Stages	+					
Stages	+ Id	Name	Description		Is End	
Stages		Name Stage1	Description Stage 1	-	Is End	Edit
Stages	Id			-		Edit Delete
Stages	Id					
Stages	Id				Z	Delete
Stages	Id				Z	Delete

ID: Code that the system assigns to identify the stage.

Name: Name of the stage.

Description: Description of the stage.

Is End: If selected, this stage is the last stage in the process.

- 4. Complete the information and then click **Done**.
- 5. To modify a stage, click **Edit**, complete the information, and then click **Done**.
- 6. Click Save.

Modify a Process Stage

Use the **Process Stages** panel to modify a process stage.

To modify a process stage

1. In the Navigation pane, click System Codes and Settings > Accounts > Process Stages.

Search X Account Process Administration Image: Account Process Applications Image: Account Process Applications Image: Account Process Applications Image: Account Process Management Tools Image: Account Process Security Image: Account Process Accounts Anchors Care Type Claim Types Claim Types Claim Type Court Desk Dispute Type Documentation Categories Extra Data Fee Schedule Hardship Type Legal Court Case Statuses Letter Types List Data Manual Process Stages Note Actions Note Results Monual Process Stages	Administration Applications Configuration Management Tools Security Services System Codes and Settings Accounts Anchor Cards Anchors Care Type Claim Types Claims Security Claim Types Claim Cotegory Court Desk Dispute Type Documentation Categories Extra Data
Administration Applications Configuration Management Tools Security Services System Codes and Settings Accounts Anchor Cards Anchors Care Type Claim Types Classes of Business Client Complaint Category Court Desk Dispute Type Documentation Categories Extra Data Fee Schedule Hardship Type Legal Court Case Statuses Letter Types List Data Manual Process Stages Note Actions Note Results	Administration Applications Configuration Management Tools Security Services System Codes and Settings Accounts Anchor Cards Anchors Care Type Claim Types Classes of Business Client Complaint Category Court Desk Dispute Type Documentation Categories Extra Data
 Applications Configuration Management Tools Security Services System Codes and Settings Accounts Anchor Cards Anchors Care Type Claim Types Classes of Business Client Complaint Category Court Desk Dispute Type Documentation Categories Extra Data Fee Schedule Hardship Type Legal Court Case Statuses Letter Types List Data Manual Process Stages Note Actions 	 Applications Configuration Management Tools Security Services System Codes and Settings Accounts Anchor Cards Anchors Care Type Claim Types Classes of Business Client Complaint Category Court Desk Dispute Type Documentation Categories Extra Data
Configuration Management Tools Security Services System Codes and Settings Accounts Anchor Cards Anchors Care Type Claim Types Classes of Business Client Complaint Category Court Desk Dispute Type Documentation Categories Extra Data Fee Schedule Hardship Type Legal Court Case Statuses Letter Types List Data Manual Process Stages Note Actions Note Results	 Configuration Management Tools Security Services System Codes and Settings Accounts Anchor Cards Anchors Care Type Claim Types Classes of Business Client Complaint Category Court Desk Dispute Type Documentation Categories Extra Data
 Management Tools Security Services System Codes and Settings Accounts Anchor Cards Anchors Care Type Claim Types Classes of Business Client Complaint Category Court Desk Dispute Type Documentation Categories Extra Data Fee Schedule Hardship Type Legal Court Case Statuses Letter Types List Data Manual Process Stages Note Actions Note Results 	 Management Tools Security Services System Codes and Settings Accounts Anchor Cards Anchors Care Type Claim Types Classes of Business Client Complaint Category Court Desk Dispute Type Documentation Categories Extra Data
 Security Services System Codes and Settings Accounts Anchor Cards Anchors Care Type Claim Types Classes of Business Client Complaint Category Court Desk Dispute Type Documentation Categories Extra Data Fee Schedule Hardship Type Legal Court Case Statuses Letter Types List Data Manual Process Stages Note Actions Note Results 	 Security Services System Codes and Settings Accounts Anchor Cards Anchors Care Type Claim Types Classes of Business Client Complaint Category Court Desk Dispute Type Documentation Categories Extra Data
 Security Services System Codes and Settings Accounts Anchor Cards Anchors Care Type Claim Types Classes of Business Client Complaint Category Court Desk Dispute Type Documentation Categories Extra Data Fee Schedule Hardship Type Legal Court Case Statuses Letter Types List Data Manual Process Stages Note Actions Note Results 	 Security Services System Codes and Settings Accounts Anchor Cards Anchors Care Type Claim Types Classes of Business Client Complaint Category Court Desk Dispute Type Documentation Categories Extra Data
 Services System Codes and Settings Accounts Accounts Anchor Cards Anchors Care Type Claim Types Classes of Business Client Complaint Category Court Desk Dispute Type Documentation Categories Extra Data Fee Schedule Hardship Type Legal Court Case Statuses Letter Types List Data Manual Process Stages Note Actions Note Results 	 Services System Codes and Settings Accounts Anchor Cards Anchors Care Type Claim Types Classes of Business Client Complaint Category Court Desk Dispute Type Documentation Categories Extra Data
 System Codes and Settings Accounts Anchor Cards Anchors Care Type Claim Types Classes of Business Client Complaint Category Court Desk Dispute Type Documentation Categories Extra Data Fee Schedule Hardship Type Legal Court Case Statuses Letter Types List Data Manual Process Stages Note Actions Note Results 	 System Codes and Settings Accounts Anchor Cards Anchors Care Type Claim Types Classes of Business Client Complaint Category Court Desk Dispute Type Documentation Categories Extra Data
 Accounts Anchor Cards Anchors Care Type Claim Types Classes of Business Client Complaint Category Court Desk Dispute Type Documentation Categories Extra Data Fee Schedule Hardship Type Legal Court Case Statuses Letter Types List Data Manual Process Stages Note Actions Note Results 	 Accounts Anchor Cards Anchors Care Type Claim Types Classes of Business Client Complaint Category Court Desk Dispute Type Documentation Categories Extra Data
Anchors Care Type Claim Types Classes of Business Client Complaint Category Court Desk Dispute Type Documentation Categories Extra Data Fee Schedule Hardship Type Legal Court Case Statuses Letter Types List Data Manual Process Stages Note Actions Note Results	Anchors Care Type Claim Types Classes of Business Client Complaint Category Court Desk Dispute Type Documentation Categories Extra Data
Care Type Claim Types Classes of Business Client Complaint Category Court Desk Dispute Type Documentation Categories Extra Data Fee Schedule Hardship Type Legal Court Case Statuses Letter Types List Data Manual Process Stages Note Actions Note Results	Care Type Claim Types Classes of Business Client Complaint Category Court Desk Dispute Type Documentation Categories Extra Data
Claim Types Classes of Business Client Complaint Category Court Desk Dispute Type Documentation Categories Extra Data Fee Schedule Hardship Type Legal Court Case Statuses Letter Types List Data Manual Process Stages Note Actions Note Results	Claim Types Classes of Business Client Complaint Category Court Desk Dispute Type Documentation Categories Extra Data
Classes of Business Client Complaint Category Court Desk Dispute Type Documentation Categories Extra Data Fee Schedule Hardship Type Legal Court Case Statuses Letter Types List Data Manual Process Stages Note Actions Note Results	Classes of Business Client Complaint Category Court Desk Dispute Type Documentation Categories Extra Data
Client Complaint Category Court Desk Dispute Type Documentation Categories Extra Data Fee Schedule Hardship Type Legal Court Case Statuses Letter Types List Data Manual Process Stages Note Actions Note Results	Client Complaint Category Court Desk Dispute Type Documentation Categories Extra Data
Complaint Category Court Desk Dispute Type Documentation Categories Extra Data Fee Schedule Hardship Type Legal Court Case Statuses Letter Types List Data Manual Process Stages Note Actions Note Results	Complaint Category Court Desk Dispute Type Documentation Categories Extra Data
Court Desk Dispute Type Documentation Categories Extra Data Fee Schedule Hardship Type Legal Court Case Statuses Letter Types List Data Manual Process Stages Note Actions Note Results	Court Desk Dispute Type Documentation Categories Extra Data
Desk Dispute Type Documentation Categories Extra Data Fee Schedule Hardship Type Legal Court Case Statuses Letter Types List Data Manual Process Stages Note Actions Note Results	Desk Dispute Type Documentation Categories Extra Data
Dispute Type Documentation Categories Extra Data Fee Schedule Hardship Type Legal Court Case Statuses Letter Types List Data Manual Process Stages Note Actions Note Results	Dispute Type Documentation Categories Extra Data
Documentation Categories Extra Data Fee Schedule Hardship Type Legal Court Case Statuses Letter Types List Data Manual Process Stages Note Actions Note Results	Documentation Categories Extra Data
Extra Data Fee Schedule Hardship Type Legal Court Case Statuses Letter Types List Data Manual Process Stages Note Actions Note Results	Extra Data
Fee Schedule Hardship Type Legal Court Case Statuses Letter Types List Data Manual Process Stages Note Actions Note Results	
Hardship Type Legal Court Case Statuses Letter Types List Data Manual Process Stages Note Actions Note Results	Fee Schedule
Legal Court Case Statuses Letter Types List Data Manual Process Stages Note Actions Note Results	
Letter Types List Data Manual Process Stages Note Actions Note Results	
List Data Manual Process Stages Note Actions Note Results	2
Manual Process Stages Note Actions Note Results	
Note Actions Note Results	
Note Results	-
	Note Results Process Stages

2. Click the process for which to modify a stage. The process expands.

× Account Process					
lame	Account Proc	255			
escription	Process Des	cription			
tart Process					
cart Process					
tages	+				
	+ Id	Name	Description	Is End	
				Is End ⊋	Edit

3. In the data grid, click **Edit**. The data grid appears in edit mode.

Name	Account Pro	cess			
Description	Process De	escription			
Start Process			•		
Stages	+				
tages	+ Id	Name	Description	Is End	
Stages		Name Stage1	Description Stage 1	Is End	Done

ID: Code that the system assigns to identify the stage.

Name: Name of the stage.

Description: Description of the stage.

Is End: If selected, this stage is the last stage in the process.

- 4. Modify the information and then click **Done**.
- 5. Click Save.

Delete a Process Stage

Use the **Process Stages** panel to delete a process stage.

To delete a process stage

1. In the Navigation pane, click System Codes and Settings > Accounts > Process Stages.

Scope System	Y	
21	+	
Search	Account Process	
Administration	0 H	elp
Applications		
Configuration		
Management Tools		
Security		
Services		
System Codes and Settings		
Accounts		
Anchor Cards		
Anchors		
Care Type		
Claim Types		
Classes of Business		
Client		
Complaint Category		
Court		
Desk		
Dispute Type		
Documentation Categories		
Extra Data		
Fee Schedule		
Hardship Type		
Legal Court Case Statuses		
Letter Types		
List Data		
Manual Process Stages		
Note Actions		
Note Results		
Process Stages		

2. Click the process from which to delete a stage. The process expands.

+					
× Account Process					
Name	Account Proc	ess			
Description	Process Des	scription			
Start Process		•			
	_				
Stages	+				
		Name	Description	To Ford	
	Id	Manie	Description	Is End	
	1d	Stage1	Stage 1	IS End ₹	Edit
	1d				Edit Delete

3. In the data grid, click **Delete** and then click **OK**.

Queue Levels

Queue Levels

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 <u>System Codes and Settings Permission</u> 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 <u>Queue Level Codes</u>.

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. For more information about working accounts in queues, see Work Queues.

- **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.

Add a Queue Level

Use the Queue Levels panel to add a queue level.

To add a queue level

1. In the Navigation pane, click System Codes and Settings > Accounts > Queue Levels.

Scope System	•			
1 1	_	Queue Level	Description	Should Queue
Search		599	ACCOUNT WORKED	
Administration				
Applications	x	600	Clerical Support	
Configuration				
Management Tools	- 2 - x	700	Supervisor Support	
Security				
Services	2 ×	800	Account On Hold	
📒 System Codes and Settings		820	Future Promise	
b Accounts	x	020	Tuture Frombe	
Anchor Cards		830	POST DATED CHECKS UNDER \$500	
Anchors				
Care Type Claim Types	× ×	840	Post Dated Credit Card	
Classes of Business				
Client		875	Linked Account (Non Driver)	
Complaint Category				
Court		998	Closed Account	
Desk				
Dispute Type		999	CLOSED ACCOUNT RETURNED	
Documentation Categories Extra Data				
Fee Schedule		000	REMINDER	
Hardship Type				
Legal Court Case Statuses	- 2 x	010	BROKEN PROMISE	a
Letter Types				
List Data	x	011	NO MORE POSTDATED CHECKS	×.
Manual Process Stages Note Actions				
Note Actions Note Results	x	012	BOUNCED CHECKS	S
Process Stages				
Queue Levels	+			O Help

2. Click the plus sign (+). A blank row appears in the data grid.

	Queue Level	Description	Should Queue
	599	ACCOUNT WORKED	
	600	Clerical Support	
	700	Supervisor Support	
	800	Account On Hold	
	820	Future Promise	
	830	POST DATED CHECKS UNDER \$500	
	840	Post Dated Credit Card	
	875	Linked Account (Non Driver)	
	998	Closed Account	
	999	CLOSED ACCOUNT RETURNED	
	000	REMINDER	
	010	BROKEN PROMISE	2
	011	NO MORE POSTDATED CHECKS	Ø
	012	BOUNCED CHECKS	Ø
× •	Queue Level *	Description *	Should Queue
1 2 3			

Queue Level: Unique three-digit code that identifies the queue level.

Description: Description of the queue.

Should queue: If selected and the queue level is between 600-799 (clerical or supervisor), accounts assigned to this queue appear in the users' 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 the check mark.

Modify a Queue Level

Use the **Queue Levels** panel to modify a queue level.

To modify a queue level

1. In the Navigation pane, click System Codes and Settings > Accounts > Queue Levels.

Scope System	•			
1 1	_	Queue Level	Description	Should Queue
Search		599	ACCOUNT WORKED	
Administration				
Applications	x x	600	Clerical Support	
Configuration				
Management Tools	🕑 🗙	700	Supervisor Support	
Security				
Services	🕝 🗙	800	Account On Hold	
System Codes and Settings	_	820	Future Promise	
Accounts	x	820	Future Fromise	
Anchor Cards		830	POST DATED CHECKS UNDER \$500	
Anchors	X	830	POST DATED CHECKS UNDER \$500	
Care Type		840	Post Dated Credit Card	
Claim Types	x	040	Post Dated Credit Card	
Classes of Business		875	Linked Account (Non Driver)	
Client		675	Enked Account (Non Driver)	
Complaint Category Court		998	Closed Account	
Desk	x	330	Closed Account	
Dispute Type		999	CLOSED ACCOUNT RETURNED	
Documentation Categories	X	333	CLOSED ACCOUNT RETORNED	
Extra Data		000	REMINDER	
Fee Schedule	x	000	REMINDER	
Hardship Type		010	BROKEN PROMISE	~
Legal Court Case Statuses	X	010	BROKEN PROMISE	1
Letter Types		011	NO MORE POSTDATED CHECKS	
List Data Manual Process Stages	x	011	NO MORE POSTDATED CHECKS	1
Note Actions		012	BOUNCED CHECKS	9
Note Results	x	012	DOURCED CRECKS	(a)
Process Stages				0.00
Queue Levels	+			O Help

2. Click the Edit icon. The queue level appears in edit mode.

_	Queue Level	Description	Should Queue
<mark>- 7</mark> 🗸	Queue Level 599	Description ACCOUNT WORKED	Should Queue
	600	Clerical Support	
	700	Supervisor Support	
	800	Account On Hold	
	820	Future Promise	
	830	POST DATED CHECKS UNDER \$500	
	840	Post Dated Credit Card	
	875	Linked Account (Non Driver)	
	998	Closed Account	
	999	CLOSED ACCOUNT RETURNED	
	000	REMINDER	
	010	BROKEN PROMISE	
	011	NO MORE POSTDATED CHECKS	X
	012	BOUNCED CHECKS	X

1 2 3

Queue Level: Unique three-digit code that identifies the queue level.

Description: Description of the queue.

Should queue: If selected, accounts assigned to this queue appear in work queues. If the user has the **Accounts – Change Continue Queuing** permission, you can override this setting when assigning an account to a support queue.

3. Modify the information and then click the check mark.

Note: For system-level queues, you cannot modify the code.

Delete a Queue Level

Use the **Queue Levels** panel to delete a queue level code.

To delete a queue level

1. In the Navigation pane, click System Codes and Settings > Accounts > Queue Levels.

Scope System	•			
1 1		Queue Level	Description	Should Queu
Search		599	ACCOUNT WORKED	
Administration				
Applications		600	Clerical Support	
Configuration				
Management Tools	8 ×	700	Supervisor Support	
Security				
Services	2 ×	800	Account On Hold	
System Codes and Settings		820	Future Promise	
Accounts		020		
Anchor Cards		830	POST DATED CHECKS UNDER \$500	
Anchors				
Care Type		840	Post Dated Credit Card	
Claim Types	x	010	rost bated creat card	
Classes of Business Client		875	Linked Account (Non Driver)	
Complaint Category		675	Enked Account (Non Driver)	
Complaint Category Court	_	998	Closed Account	
Desk	x	990	Closed Account	
Dispute Type				
Documentation Categories	Z ×	999	CLOSED ACCOUNT RETURNED	
Extra Data				
Fee Schedule	2 ×	000	REMINDER	
Hardship Type				
Legal Court Case Statuses	Z ×	010	BROKEN PROMISE	A
Letter Types				
List Data	🕜 🗙	011	NO MORE POSTDATED CHECKS	1
Manual Process Stages				
Note Actions	2 ×	012	BOUNCED CHECKS	A
Note Results				
Process Stages	+			O Help
Queue Levels				

2. Click the Delete icon and then click **Yes**.

Queue Level Codes

Latitude releases with several queue level codes, as described in the following table. 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.

Queue Level	Name	Assignment	Queues for Work?	Reassignment
000		Latitude assigns this queue level when a user creates a reminder or follow-up on an account.		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.

		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 displays on the designated day when a user attempts to move to the next account in a work queue.		 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.
010	Broken Promise	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. Note: If a grace period exists for the account, Custodian delays assigning this queue level and placing payments on	Yes	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.

		hold until the grace period expires without a payment posting on the account.		
011	No More Postdated Checks	Custodian assigns this queue level when an account completes a post-dated payment arrangement successfully but a balance remains on the account.	Yes	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.
012	Bounced Checks	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.	Yes	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.
013	No More Promises	Custodian assigns this queue level when an account completes a promise payment arrangement successfully but a balance remains on the account.	Yes	After a user negotiates a new payment arrangement, Custodian reassigns the account to the queue level that applies based on account activity or condition.
015	New Accounts	Custodian assigns this queue level when you import a new account into Latitude that is either not a linked account or is the link driver. If the new account is not the link driver, Custodian assigns the account to queue level 875.	Yes	If a user accesses but doesn't work the account, Custodian reassigns the account to queue level 016. If a user accesses and works the account, Custodian reassigns the account to queue level 599.
016	NewBiz Followup	Custodian assigns this queue level when a user accesses but doesn't work a new account that is either not a linked account or is the link driver.	Yes	After a user works the account the same day or the set number of days allowed, Custodian reassigns the account to the queue level that applies based on the account activity or condition.
				Note: If your organization configured the desk to allow users to work a new account for a specific number of days, the account remains at this queue level until that time passes.

018	PDC over \$500	Latitude assigns this queue level when an account has a post-dated check or ACH payment arrangement with payments that are \$500 or more each.	Yes	After a user contacts the customer regarding the upcoming deduction of funds, Custodian reassigns the account to the queue level that applies based on the account activity or condition.
019	NSF With PDCs	Custodian assigns this queue level when an account has a payment reversal because the check bounced and there are future payments in the payment arrangement. Custodian places the future payments on hold.	Yes	After a user receives a payment or renegotiates the 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.
020	Accounts 0 - 30 Days Old	Custodian assigns this queue level when an account has been in Latitude less than 31 days since the date received.	Yes	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. If 30 days pass and a user hasn't worked the account, Custodian reassigns the account to queue level 030.
025	Accounts W Payment	No longer in use.	N/A	N/A
030	Accounts 30 – 60 Days Old	Custodian assigns this queue level when an account has been in Latitude between 30 and 60 days since the date received.	Yes	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. If 60 days pass and a user hasn't worked the account, Custodian reassigns the account to queue level 060.
060	Accounts 60 – 90 Days Old	Custodian assigns this queue level when an account has been in Latitude between 60 and 90 days since the date received.	Yes	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. If 90 days pass and a user hasn't worked the account, Custodian reassigns the account to queue level 090.

090	Accounts 90 – 120 Days Old	Custodian assigns this queue level when an account has been in Latitude between 90 and 120 days since the date received.	Yes	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. If 120 days pass and a user hasn't
				worked the account, Custodian reassigns the account to queue level 120.
100	Account Reassigned	Custodian assigns this queue level when an account that is not new business moves from one desk to another.	Yes	After a user works the account, Custodian reassigns the account to the queue level that applies based on account activity or condition.
120	Over 120 Days Old	Custodian assigns this queue level when an account has been in Latitude for more than 120 days since the date received.	Yes	After a user works the account, Custodian reassigns the account to the queue level that applies based on account activity or condition.
200		Latitude assigns this queue level when a user receives a requested credit report and adds it to an account.	Yes	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.
400*	Late Night Queue (1)	Users assign this queue level initially when an account requires after-hours follow-up. Custodian assigns this queue level when an account reaches	Yes	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.
		queue level 403 without a user working it.		If a user doesn't work the account on the current day, Custodian reassigns the account to queue level 401.
401*	Late Night Queue (2)	Custodian assigns this queue level when a user didn't work an account while it was at queue level 400.	Yes	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.
402*	Late Night Queue (3)	Custodian assigns this queue level when a user didn't work an account while it was at queue level 401.	Yes	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.
403*	Late Night Queue (4)	Custodian assigns this queue level when a user didn't work an account while it was at queue level 402.	Yes	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.
425- 499*	Custom Queue Levels	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 <u>Queue Levels</u> .	Yes	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.
599	Account Worked	Latitude assigns this queue level when a user works an account on the current day.	No	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.
600- 699*	Clerical Support	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.	Yes	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.
		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 <u>Queue Levels</u> .		

700- 799*	Supervisor Support	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. 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 <u>Queue</u> Levels.	Yes	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.
800	Account on Hold	Latitude assigns this queue level when an account has a customer-level or account-level hold.	No	After a user or Latitude removes the hold on the account, Custodian reassigns the account to the queue level that applies based on account activity or condition.
820	Future Promise	Latitude assigns this queue level when an account has a new promise payment arrangement.	No	When Custodian identifies a broken or complete payment arrangement, Custodian reassigns the account to the queue level that applies based on account activity or condition.
830	Post-dated Checks Under \$500	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.	No	When Custodian identifies a broken or complete payment arrangement, Custodian reassigns the account to the queue level that applies based on account activity or condition.
840	Post-dated Credit Card	Latitude assigns this queue level when an account has a post-dated credit card payment arrangement with payments that are less than \$500 each.	No	When Custodian identifies a broken or complete payment arrangement, Custodian reassigns the account to the queue level that applies based on account activity or condition.
875	Linked Account (Non Driver)	Custodian assigns this queue level when an account is a	No	If Custodian identifies the account as closed, Custodian reassigns the account

		linked account but isn't the link driver account. Users work these accounts when the link driver account queues for work.	to queue level 998. If Custodian identifies the account as closed and returned, Custodian reassigns the account to queue level 999.
998		Latitude assigns this queue level when an account has a closed status.	 If Custodian identifies the account as closed and returned, Custodian reassigns the account to queue level 999.
	Returned	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

You can search for, add, modify, and delete responsible party codes that represent the relation of a party to an account (for example, co-debtor). Your organization can set up an unlimited number of responsible party codes, and record separate demographic information for each party associated to an account. Users specify a responsible party code when adding a party to an account. For more information, see Add a Party to an Account.

Add a Responsible Party Code

Use the **Responsible Party Codes** panel to add a responsible party code.

To add a responsible party code

1. In the Navigation pane, click System Codes and Settings > Accounts > Responsible Party Codes.

System Codes and Settings

cope System *		
1 1	Responsible Party	Description
earch	1	CO-DEBTOR 1
Administration		
Applications	2	CO-DEBTOR 2
Configuration		
Management Tools	3	CO-DEBTOR 3
Security		
Services Z ×	4	CO-DEBTOR 4
System Codes and Settings	5	00 DEPTOR 5
Accounts	5	CO-DEBTOR 5
Anchor Cards	6	CO-DEBTOR 6
Anchors Z ×	0	CO-DEBTOR 0
Care Type	0 *	DEBTOR
Claim Types	0	DEDTOR
Classes of Business		
Client Complaint Category		
Court		Help
Desk		• nup
Dispute Type		
Documentation Categories		
Extra Data		
Fee Schedule		
Hardship Type		
Legal Court Case Statuses		
Letter Types List Data		
Manual Process Stages		
Note Actions		
Note Results		
Process Stages		
Queue Levels		
Responsible Party Codes		

2. Click the plus sign (+). A blank row appears in the data grid.

_	Responsible Party	Description
	1	CO-DEBTOR 1
	2	CO-DEBTOR 2
	3	CO-DEBTOR 3
	4	CO-DEBTOR 4
	5	CO-DEBTOR 5
	6	CO-DEBTOR 6
	0 *	DEBTOR
× ×	Responsible Party *	Description *

3. In the **Code** box, type a unique code for the responsible party code.

- 4. In the **Description** box, type a description of the responsible party code.
- 5. Click the check mark.

Modify a Responsible Party Code

Use the **Responsible Party Codes** panel to modify a responsible party code.

To modify a responsible party code

1. In the Navigation pane, click System Codes and Settings > Accounts > Responsible Party Codes.

cope System	•		
2 1	_	Responsible Party	Description
Search		1	CO-DEBTOR 1
Administration			
Applications	🐷 🗙	2	CO-DEBTOR 2
Configuration		-	
Management Tools	x	3	CO-DEBTOR 3
Security			CO. DEDTOD 4
Services		4	CO-DEBTOR 4
b System Codes and Settings		5	CO-DEBTOR 5
🖶 Accounts	x	5	CO-DEBTOR 5
Anchor Cards		6	CO-DEBTOR 6
Anchors	X	•	CO-DEDTOR O
Care Type		0 *	DEBTOR
Claim Types	Z ×		DEDTOR
Classes of Business Client			
Complaint Category	+		
Court			Help
Desk			• Help
Dispute Type			
Documentation Categories			
Extra Data			
Fee Schedule			
Hardship Type			
Legal Court Case Statuses			
Letter Types List Data			
Manual Process Stages			
Note Actions			
Note Results			
Process Stages			
Queue Levels			
Responsible Party Codes			

2. Click the Edit icon. The responsible party code appears in edit mode.

_	Responsible Party	Description
	Responsible Party 1	Description CO-DEBTOR 1
	2	CO-DEBTOR 2
	3	CO-DEBTOR 3
	4	CO-DEBTOR 4
	5	CO-DEBTOR 5
	6	CO-DEBTOR 6
	0 *	DEBTOR

3. Modify the information and then click the check mark.

Delete a Responsible Party Code

Use the **Responsible Party Codes** panel to delete a responsible party code.

To delete a responsible party code

1. In the Navigation pane, click System Codes and Settings > Accounts > Responsible Party Codes.

sope System •		
1 1	Res	ponsible Party Descriptio
earch	Z X 1	CO-DEBTOR 1
Administration		
Applications	2 x 2	CO-DEBTOR 2
Configuration		
Management Tools	🗶 🗙 3	CO-DEBTOR 3
Security		
Services	🗷 🗙 4	CO-DEBTOR 4
System Codes and Settings	5	CO-DEBTOR 5
b Accounts	🖉 🗙 🔰	CO-DEBTOR 5
Anchor Cards	6	CO-DEBTOR 6
Anchors	× °	CO-DEBTOR 6
Care Type		
Claim Types	✓ × 0*	DEBTOR
Classes of Business		
Client	+	
Complaint Category	_	
Court		• Help
Desk		
Dispute Type		
Documentation Categories		
Extra Data		
Fee Schedule		
Hardship Type		
Legal Court Case Statuses		
Letter Types		
List Data		
Manual Process Stages Note Actions		
Note Results		
Process Stages		
Queue Levels		
Responsible Party Codes		

2. Click the Delete icon and then click **Yes**.

Status Codes

Status Codes

You can search for, add, modify, and delete status codes. Status codes represent the state of an account and whether it is active or closed. Latitude releases with several standard status codes.

Add a Status Code

Use the **Status** dialog box to add a status code.

To add a status code

1. In the Navigation pane, click System Codes and Settings > Accounts > Statuses.

1 ×		Status Code	Description	Closed
earch	☑ ×	AEX	ALL EFFORTS EXHAUSTED	×.
Administration				
Applications	2 ×	B07	CHAPTER 7 BANKRUPTCY **	1
Configuration				
Management Tools	x	B13	CHAPTER 13 BANKRUPTCY **	
Security				
Services	K	CCR	CLOSED CLIENT REQUEST	S.
System Codes and Settings		CND	CEASE AND DESIST	
Accounts	☑ ×	CND	CEASE AND DESIST	×.
Anchor Cards		DEC	DEBTOR IS DECEASED	1
Anchors	✓ ×	DEC	DEDTOR IS DECEMBED	(A)
Care Type		DIP	DEBTOR IN PRISON	a
Claim Types Classes of Business	2 ×			
Classes of Business		DUP	DUPLICATE ACCT IN SYSTEM	
Complaint Category				۲
Court		PIE	PLACED IN ERROR	a
Desk				
Dispute Type		PIF	ACCOUNT PAID IN FULL **	a
Documentation Categories				
Extra Data		RCL	RECALLED BY CLIENT	
Fee Schedule Hardship Type				
Legal Court Case Statuses		RTS	Recourse to Seller	1
Letter Types				
List Data	C	SIF	ACCOUNT SETTLED IN FULL **	a
Manual Process Stages				
Note Actions	2 ×	SLD	ACCOUNT SOLD	1
Note Results				
Process Stages	+			
Queue Levels Responsible Party Codes				

1.

2. Click the plus sign (+). The **Status** dialog box appears.

	×
Status Code].
Advisory Text	
0 - Active	Ŧ
Return Days	
 This status code will red Include in case counts 	duce customer placement statistics.
	Advisory Text 0 - Active Return Days This status code will return

Status Code: Unique code that identifies the status.

Description: Description of the status.

Status Type: Type of status that the status code applies to, such as active or closed. Accounts with a closed status type code don't appear in work queues.

Cancel

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, Latitude excludes accounts assigned to this status code from customer account placement statistics.

Include in case counts: If selected, the Desk Mover program includes accounts in this status when determining whether the case count exceeds the case limit set for the desk.

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 **Save**.

Modify a Status Code

Use the **Status** dialog box to modify a status code.

To modify a status code

1. In the Navigation pane, click System Codes and Settings > Accounts > Statuses.

2 1		Status Code	Description	Closed
earch		AEX	ALL EFFORTS EXHAUSTED	æ
Administration				
Applications	2 ×	B07	CHAPTER 7 BANKRUPTCY **	at .
Configuration				
Management Tools	X	B13	CHAPTER 13 BANKRUPTCY **	
Security				
Services	Z ×	CCR	CLOSED CLIENT REQUEST	d'
System Codes and Settings				
Accounts	x	CND	CEASE AND DESIST	×.
Anchor Cards		DEC	DEBTOR IS DECEASED	
Anchors	×	DEC	DEBTOR IS DECEASED	at .
Care Type		DIP	DEBTOR IN PRISON	×.
Claim Types	2 ×	011	DEBTOR IN FRESON	1
Classes of Business Client		DUP	DUPLICATE ACCT IN SYSTEM	1
Complaint Category	× ×	201	DOI LIGHTE ACCT IN DIDITEN	(A)
Court		PIE	PLACED IN ERROR	a
Desk				<u>(4</u>)
Dispute Type		PIF	ACCOUNT PAID IN FULL **	9
Documentation Categories				
Extra Data		RCL	RECALLED BY CLIENT	a
Fee Schedule				
Hardship Type Legal Court Case Statuses		RTS	Recourse to Seller	1
Letter Types				
List Data		SIF	ACCOUNT SETTLED IN FULL **	a
Manual Process Stages				
Note Actions		SLD	ACCOUNT SOLD	4
Note Results				
Process Stages	+			
Queue Levels				
Responsible Party Codes Statuses	1 2 3			O Help

1.

2. Click the Edit icon. The status code appears in edit mode.

Status	×
Description:	ALL EFFORTS EXHAUSTED
Status Type:	1 - Closed 🔻
Return Days:	30
	This status code will reduce customer placement statistics.
	Include in case counts
	Cancel

Description: Description of the status.

Status Type: Type of status that the status code applies to, such as active or closed. Accounts with a closed status type code don't appear in work queues.

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, Latitude excludes accounts assigned to this status code from customer account placement statistics.

Include in case counts: If selected, the Desk Mover program includes accounts in this status when determining whether the case count exceeds the case limit set for the desk.

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. Modify the information and then click **Save**.

Delete a Status Code

Use the **Statuses** panel to delete a status code.

To delete a status code

1. In the Navigation pane, click System Codes and Settings > Accounts > Statuses.

icope System	T			
1 1		Status Code	Description	Close
iearch	.	AEX	ALL EFFORTS EXHAUSTED	Ø
Administration				
Applications	2 ×	B07	CHAPTER 7 BANKRUPTCY **	48
Configuration				
Management Tools	X	B13	CHAPTER 13 BANKRUPTCY **	
Security				
Services	Z ×	CCR	CLOSED CLIENT REQUEST	d'
System Codes and Settings		CND	CEASE AND DESIST	
Accounts	x	CND	CEASE AND DESIST	×.
Anchor Cards		DEC	DEBTOR IS DECEASED	
Anchors	Z ×	DEC	DEBTOR IS DECEASED	d.
Care Type		DIP	DEBTOR IN PRISON	-
Claim Types		DIF	DEBTOR IN FRISON	I.
Classes of Business		DUP	DUPLICATE ACCT IN SYSTEM	~
Client Complaint Category	x	DOP	DOPLICATE ACCT IN STSTEM	at the second se
Court		PIE	PLACED IN ERROR	
Desk	2 ×	FIE	PDACED IN ERROR	al a
Dispute Type		PIF	ACCOUNT PAID IN FULL **	1
Documentation Categories		r ar	ACCOUNT PRID IN FOLL	8
Extra Data		RCL	RECALLED BY CLIENT	1
Fee Schedule	Z *	NCL .	Recalled of client	(4)
Hardship Type		RTS	Recourse to Seller	1
Legal Court Case Statuses Letter Types	x			(8)
List Data		SIF	ACCOUNT SETTLED IN FULL **	4
Manual Process Stages				
Note Actions		SLD	ACCOUNT SOLD	1
Note Results	2 ×			(er.)
Process Stages	+			
Queue Levels				
Responsible Party Codes				O Help
Statuses	1 2 3			• Help

2. Click the Delete icon and then click **Yes**.

System Configuration

System Configuration

You can view and maintain settings for your organization that apply globally across Latitude. These settings include company information, money titles, letter defaults, system settings, account titles, client titles, file paths, and miscellaneous settings. You must have the <u>System Configuration Permission</u> to modify the settings.

Maintain Company Information

Use the **Company** tab to maintain information about your organization.

To maintain company information

cope System	
1 1	Compa
Search	QA MOI
Administration	
Applications	• He
Configuration	
Management Tools	
Security	
Services	
System Codes and Settings	
Accounts	
Anchor Cards Anchors	
Care Type Claim Types	
Classes of Business	
Client	
Complaint Category	
Court	
Desk	
Dispute Type	
Documentation Categories	
Extra Data	
Fee Schedule	
Hardship Type	
Legal Court Case Statuses	
Letter Types	
List Data	
Manual Process Stages	
Note Actions	
Note Results	
Process Stages	
Queue Levels Responsible Party Codes	
Statuses	
System Configuration	

2. Click the Edit icon and then click the **Company** tab.

Company	Money '	Titles	Letter Defaults	Settings	Account Titles	
Client Titles	Misc					
Company		QA MODEL				
Address 1		7800 BELFORT PARKWAY				
Address 2 SU		SUITE	100			
City/St/Zip		JACKSONVILLE		FL		
322		32256				
County/Country County			Country			
Phone 904-680-7100		30-7100				
Fax		904-68	30-7139			
800 Phone		866-39	96-2599			
E-mail		Email				

Company: Name of your organization.

Address 1: First line of your organization's street address.

Address 2: Second line of your organization's street address.

City/State/ZIP: Your organization's city, state, and postal code.

County/Country: Your organization's county and country.

Phone: Your organization's phone number.

Fax: Your organization's fax number.

800 Phone: Your organization's 1-800 phone number.

Email: Your organization's email address.

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

Maintain Money Titles

Use the **Money Titles** tab to specify labels for the money buckets that store money amounts for accounts.

To maintain money titles

cope System	•
1 1	Compa
Search	QA MO
Administration	
Applications	O H
Configuration	
Management Tools	
Security	
Services	
System Codes and Settings	
Accounts Anchor Cards	
Anchors	
Care Type	
Claim Types	
Classes of Business	
Client	
Complaint Category	
Court	
Desk	
Dispute Type	
Documentation Categories	
Extra Data	
Fee Schedule	
Hardship Type	
Legal Court Case Statuses Letter Types	
List Data	
Manual Process Stages	
Note Actions	
Note Results	
Process Stages	
Queue Levels	
Responsible Party Codes	
Statuses	
System Configuration	

2. Click the Edit icon and then click the **Money Titles** tab.

Company	Money	Titles Letter Defaults	Settings	Account Titles	
Client Titles	Misc				
Money 1		Principal]		
Money 2		Interest			
Money 3		Collection Costs			
Money 4		Bad Check Chgs			
Money 5		Court Cost			
Money 6	Attorney Fees				
Money 7		Misc			
Money 8		Money 8			
Money 9					
Money 10		Transaction Charges			

Money 1: Latitude reserves this money bucket for principal.

Money 2: Latitude reserves this money bucket for interest.

Money 10: Latitude reserves this money bucket for transaction charges.

Money 3 through **Money 9**: You can use these money buckets to store whatever money amounts you want. The values you provide in these boxes become the labels for these amounts when they appear in other areas of the system (for example, the **Balance Details** panel).

3. Add up to seven labels and then click Save.

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 to specify the default letter to generate for specific transactions. You generate letters using Letter Console. For more information about Letter Console, see the *Letter Console* documentation.

To maintain letter defaults

cope System	•
1 1	Compa
Search	QA MOD
Administration	
Applications	O He
Configuration	
Management Tools	
Security	
Services	
System Codes and Settings	
Accounts	
Anchor Cards	
Anchors	
Care Type	
Claim Types	
Classes of Business	
Client	
Complaint Category	
Court	
Desk	
Dispute Type	
Documentation Categories	
Extra Data	
Fee Schedule	
Hardship Type	
Legal Court Case Statuses	
Letter Types	
List Data	
Manual Process Stages	
Note Actions	
Note Results	
Process Stages	
Queue Levels Rosponsible Party Codes	
Responsible Party Codes	
Statuses System Configuration	

2. Click the Edit icon and then click the Letter Defaults tab.

Company	Money Titles	Letter Defaults	Settings	Account Titles
client Titles	Misc			
eminder Le	tter		- Payment R	eminder 🔹
ost Dated C	heck Notice		NITD - NITD I	.etter://////////////
roken Prom	ise			

Reminder Letter: Letter to remind customers of their payment promise due date and amount due. Latitude generates this letter when a user adds a promise to an account.

Post Dated Check Notice: Letter to notify the customer of the deposit date. Latitude generates this letter when a user adds a post-dated check or credit card payment to an account.

Broken Promise: Letter to notify the customer that the date they promised to pay has passed. Latitude generates this letter when a promise becomes past due without receiving a payment.

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

Maintain System Settings

Use the Settings tab to specify system-wide default settings.

To maintain system settings

cope System	•
2 1	Compa
Search	QA MOD
Administration	
Applications	O He
Configuration	
Management Tools	
Security	
Services	
System Codes and Settings	
Accounts	
Anchor Cards	
Anchors	
Care Type	
Claim Types	
Classes of Business	
Client	
Complaint Category	
Court	
Desk	
Dispute Type	
Documentation Categories	
Extra Data	
Fee Schedule	
Hardship Type	
Legal Court Case Statuses	
Letter Types	
List Data	
Manual Process Stages	
Note Actions	
Note Results	
Process Stages	
Queue Levels	
Responsible Party Codes	
Statuses System Configuration	

2. Click the Edit icon and then click the **Settings** tab.

Company Mo	ney Titles	Letter Defaults	Settings	Account Titles	Client Titles	Misc	
System Password		Change		Current Mont	th	6	
Next File Number		2424		Current Year		2017	
Next Link Number		24		End of Month	n Date	06/30/2017	7 🛗
Next Invoice Numb	er	102			Set	New Month	
General Trust		00000 - General Tru	st 🗸		Res	et Desk CBR	Limits
Operating Trust		00000 - General Tru	st 🗸				

System Password: Allows the administrator account user to reset the administrator account password.

Next File Number: Unique number to assign to the next new account. Latitude 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 linked accounts. Latitude assigns the next sequential link number to each link created thereafter.

Next Invoice Number: Unique number to assign to the next invoice generated using the Invoices program. Latitude 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 directed by Latitude by Genesys Support. 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 directed by Latitude by Genesys Support. All other times, click **Set New Month** instead.

End of Month Date: Last posting day for the current month. This date isn't necessarily the last calendar day of the month.

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 June business in July as long as you haven't changed the accounting period to July.

Reset Desk CBR Limits: Resets the number of Credit Bureau Requests (CBRs) to zero (0) for all desks. You configure desks with a limit to the number of CBRs the desk can request each month. When you change the accounting period, reset the number of CBRs.

3. To set the next accounting period after your organization has completed monthly processing, do the following:

a. Click **Set New Month** and in the confirmation dialog box, click **Yes**. Latitude advances the current month to the next month. If it's the end of the year, Latitude advances the current year to the next year.

b. Verify the end of month date. If the date is incorrect, in the **End Of Month Date** box, type or click the correct date.

4. Complete the information in the dialog box and then click **Save**.

Maintain Account Titles

Use the **Account Titles** tab to specify labels for miscellaneous dates you want to record on accounts.

To maintain account titles

	Compan
earch	QA MODE
Administration	
Applications	O Help
Configuration	
Management Tools	
Security	
Services	
System Codes and Settings	
Accounts	
Anchor Cards	
Anchors	
Care Type	
Claim Types	
Classes of Business	
Client	
Complaint Category	
Court	
Desk	
Dispute Type	
Documentation Categories	
Extra Data	
Fee Schedule	
Hardship Type Legal Court Case Statuses	
Letter Types	
List Data	
Manual Process Stages	
Note Actions	
Note Results	
Process Stages	
Queue Levels	
Responsible Party Codes	
Statuses	

2. Click the Edit icon and then click the **Account Titles** tab.

Company	Money Titles	Letter Defaults	Settings	Account Titles
Client Titles	Misc			
Jser Date Ti	tle 1	C	ustom Date 1	unan jiti
Jser Date Ti	tle 2	c	ustom Date 2	
User Date Ti	tle 3	C	ustom Date 3	

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 **Account Dates** panel. For example, if you type "Date First Billed" in the **User Date Title 1** box, "Date First Billed" appears as a label next to an input box on the **Account Dates** panel. For more information, see View or Modify Account Dates.

3. Add up to three labels and then click **OK**.

Client Titles

Client Titles

You can specify labels for data that you want users to record when adding or modifying clients. For more information, see <u>Custom Data</u>.

Maintain Client Date Titles

Use the **Dates** tab to specify up to nine labels for dates to display when adding or modifying client accounts.

To maintain client date titles

cope System •	
1 1	Compa
Search	QA MOI
Administration	-
Applications	• He
Configuration	
Management Tools	
Security	
Services	
System Codes and Settings	
Accounts	
Anchor Cards	
Anchors	
Care Type	
Claim Types	
Classes of Business	
Client	
Complaint Category	
Court	
Desk	
Dispute Type	
Documentation Categories	
Extra Data	
Fee Schedule	
Hardship Type	
Legal Court Case Statuses	
Letter Types	
List Data	
Manual Process Stages	
Note Actions	
Note Results	
Process Stages	
Queue Levels	
Responsible Party Codes	
Statuses System Configuration	

- 2. Click the Edit icon.
- 3. Click the **Customer Titles** tab and then click the **Dates** tab.

Company	Money T	itles	Letter Defa	aults	Settings	Account Titles
client Titles	Misc					
Dates	Options	Value	s Text			
Date 1		Discha	rge	3200]	
Date 2		Custon	ner Date 2			
Date 3		Custon	ner Date 3			
Date 4		Custon	ner Date 4		1334	
Date 5		Custon	ner Date 5]	
Date 6		Custor	ner Date 6	0.04	1222	
Date 7		Custon	ner Date 7]4334	
Date 8		Custon	ner Date 8]282	
A.L.A		<u>(12000)</u>				

Date 1 through **Date 9**: The values you provide in these boxes become the labels for dates you want to appear when adding a client. For example, if you type "Discharge" in the **Date 1** box, "Discharge" appears as a label next to an input box on the **Custom** tab. For more information, see <u>Maintain Custom Dates</u>.

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

Maintain Client Option Titles

Use the **Options** tab in the **Client Titles** panel to specify up to nine labels for check box options to display when adding or modifying clients.

To maintain client option titles

cope System	
1 1	Compar
Search	QA MOD
Administration	
Applications	O Hel
Configuration	
Management Tools	
Security	
Services	
System Codes and Settings	
Accounts	
Anchor Cards	
Anchors	
Care Type	
Claim Types	
Classes of Business	
Client	
Complaint Category	
Court	
Desk	
Dispute Type	
Documentation Categories	
Extra Data	
Fee Schedule	
Hardship Type	
Legal Court Case Statuses	
Letter Types	
List Data	
Manual Process Stages	
Note Actions	
Note Results Process Stages	
Queue Levels	
Responsible Party Codes	
Statuses	
System Configuration	

- 2. Click the Edit icon.
- 3. Click the **Customer Titles** tab and then click the **Options** tab.

Company	Money T	itles	Letter Defaults	Settings	Account Titles	
lient Titles	Misc					
Dates	Options	Value	s Text			
Option 1		Test				
Option 2		Custon	ner Option 2	16656		
Option 3		Custon	ner Option 3			
Option 4		Custon	ner Option 4			
Option 5		Custon	ner Option 5			
Option 6		Custon	ner Option 6			
Option 7		Custon	ner Option 7] 233		
Option 8		Custon	ner Option 8] 游戏:		
A		1.2.1.2.1	11-11-11-11-11-11-11-11-11-11-11-11-11-	<u>a 1945) (</u>		

Option 1 through **Option 9**: The values you provide in these boxes become the labels for options you want to appear on the **Custom** tab in the **Client** dialog box. For example, if you type "Filed Bankruptcy" in the **Option 1** box, "Filed Bankruptcy" appears as a label next to an input box on the **Custom** tab. For more information, see <u>Maintain Custom Options</u>.

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

Maintain Client Text Titles

Use the **Text** tab in the **Client Titles** panel to specify up to nine labels for text to display when adding or modifying clients.

To maintain client text titles

cope System •	
1 1	Compa
Search	QA MOI
Administration	-
Applications	• He
Configuration	
Management Tools	
Security	
Services	
System Codes and Settings	
Accounts	
Anchor Cards	
Anchors	
Care Type	
Claim Types	
Classes of Business	
Client	
Complaint Category	
Court	
Desk	
Dispute Type	
Documentation Categories	
Extra Data	
Fee Schedule	
Hardship Type	
Legal Court Case Statuses	
Letter Types	
List Data	
Manual Process Stages	
Note Actions	
Note Results	
Process Stages	
Queue Levels	
Responsible Party Codes	
Statuses System Configuration	

- 2. Click the Edit icon.
- 3. Click the **Customer Titles** tab and then click the **Text** tab.

Company	Money T	itles I	Letter Defaults	Settings	Account Titles		
Client Title	s Misc						
Dates	Options	Values	Text				
Text 1		1800					
Text 2		Custom	er Text 2				
Text 3		Custom	er text 3				
Text 4		Customer Text: 4					
Text 5		Customer Text 5					

Text 1 through **Text 9**: The values you provide in these boxes become the labels for text you want to appear on the **Custom** tab in the **Client** dialog box. For example, if you type "Bankruptcy Status" in the **Text 1** box, "Bankruptcy Status" appears as a label next to an input box on the **Custom** tab. For more information, see <u>Maintain Custom Text</u>.

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

Maintain Client Value Titles

Use the **Values** tab in the **Client Titles** panel to specify up to nine labels for numeric values to display when adding or modifying clients.

To maintain client value titles

cope System •	
1 1	Compa
Search	QA MOI
Administration	-
Applications	• He
Configuration	
Management Tools	
Security	
Services	
System Codes and Settings	
Accounts	
Anchor Cards	
Anchors	
Care Type	
Claim Types	
Classes of Business	
Client	
Complaint Category	
Court	
Desk	
Dispute Type	
Documentation Categories	
Extra Data	
Fee Schedule	
Hardship Type	
Legal Court Case Statuses	
Letter Types	
List Data	
Manual Process Stages	
Note Actions	
Note Results	
Process Stages	
Queue Levels	
Responsible Party Codes	
Statuses System Configuration	

- 2. Click the Edit icon.
- 3. Click the **Customer Titles** tab and then click the **Values** tab.

ompany	Money T	itlės	Letter De	faults	Settings	Account Titles
lient Titles	Misc					
Dates	Options	Valu	es Text	in the second		
Value 1		Test1	• • • • • • • • • • • • • • • • • • •]	
Value 2		Custo	mer Value	2		
Value 3		Custo	mer Value	3		
Value 4		Custo	mer Value	4		
Value 5		Custo	mer Value	5		
Value 6		Custo	mer Value	6		
Value 7		Custo	mer Value	7] 2022	
Value 8		Custo	mer Value	8] 22.2	
and the second		1000	and the second second	Sec. 022	1022523	

Value 1 through Value 9: The values you provide in these boxes become the labels for numeric values you want to appear on the **Custom** tab in the **Client** dialog box. For example, if you type "Number of Bankruptcies Filed" in the **Value 1** box, "Number of Bankruptcies Filed" appears as a label next to an input box on the **Custom** tab. For more information, see <u>Maintain Custom Values</u>.

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

Maintain Miscellaneous Settings

Use the **Misc** tab to specify the "You've Got Claims" identification number, the name of your outgoing email server, and the path to your custom reports.

To maintain miscellaneous settings

cope System *	
	Compar
iearch	QA MOD
Administration	
Applications	O Hel
Configuration	
Management Tools	
Security	
Services	
System Codes and Settings	
Accounts	
Anchor Cards	
Anchors	
Care Type	
Claim Types	
Classes of Business	
Client	
Complaint Category	
Court	
Desk	
Dispute Type	
Documentation Categories	
Extra Data	
Fee Schedule	
Hardship Type	
Legal Court Case Statuses	
Letter Types	
List Data	
Manual Process Stages	
Note Actions	
Note Results	
Process Stages	
Queue Levels	
Responsible Party Codes	
Statuses	

2. Click the Edit icon and then click the **Misc** tab.

Company	Money Titles	Letter Defaults	Settings	Account Titles	Client Titles	Misc	
You Got Claim ID	15	You Got Claims	ID				
Mail Server (Out)		Mail Server (Ou	t)				

You Got Claims ID: "You've Got Claims" identification number used for accounts placed with an attorney.

Mail Server (Out): Network name of the outgoing email server. If this setting is incorrect, email letter functions fail.

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

Financial Codes

Financial Codes

You can set up and configure system codes that users can assign to financial transactions for an account.

ABA Routing Numbers

ABA Routing Numbers

You can search for, add, modify, and delete American Bankers Association (ABA) routing numbers. Latitude uses these numbers to verify the financial institution when users submit a check, ACH, electronic funds transfer, or online banking transaction. Users specify a routing number when adding an ACH or paper draft account to a customer's account. For more information, see Add an ACH or Paper Draft Account.

Add an ABA Routing Number

Use the **ABA** dialog box to add an ABA routing number.

To add an ABA routing number

1. In the Navigation pane, click System Codes and Settings > Financial > ABA.

cope System	•		
1 1		ABA	Bank Name
Search	✓ ×	00000505	UNITED STATES TREASURER
Administration	Z X	000000518	UNITED STATES TREASURER
Configuration			
Management Tools	x 🛛	000001009	U S DEPT AGRICULTURE FOOD & NUTRITION SERVICE O
Security	×	000001193	POSTAL MONEY ORDERS NATIONWIDE
System Codes and Settings	Z X	000008002	US POSTAL MONEY ORDERS
Financial ABA	×	000090007	SAVINGS BONDS
Banks Credit Card Type	Z ×	011000015	FEDERAL RESERVE BANK OF BOSTON
Legal Ledger Types Payment Methods	Z ×	011000028	STATE STREET BANK AND TRUST COMPANY
Payment Sub-Batch Type Salesman	×	011000138	FLEET NATIONAL BANK
General Settings Organization Groups	∠ ×	011000206	FLEET NATIONAL BANK
Parties	×	011000390	BANK OF BOSTON, NATIONAL ASSOCIATION
	×	011000536	FEDERAL HOME LOAN BANK OF BOSTON
	Z ×	011001234	BOSTON SAFE DEPOSIT AND TRUST COMPANY
	Z X	011001276	THE BOSTON BANK OF COMMERCE
	+		• Help
	Previous 5 1	2 3	2580 Next 5

Tip: To limit the records that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

2. Click the plus sign (+). The **ABA** dialog box appears.

ABA		
Routing	•	
Bank		
Bank		
Address		
Address		
City		
City		
State		
State		
Zip		
Zip		
Country		
Country		
		÷

ABA: Routing number that identifies the bank.

Bank: Name of the bank.

Address: Bank's street address.

City: Bank's city.

State: Bank's state.

Zip: Bank's ZIP Code.

Country: Bank's country.

County: Bank's county.

Phone: Bank's phone number.

Fax: Bank's fax number.

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

Modify an ABA Routing Number

Use the **ABA** dialog box to modify an ABA routing number.

To modify an ABA routing number

1. In the Navigation pane, click System Codes and Settings > Financial > ABA.

cope System	•		
1 1		ABA	Bank Name
Search	Z X	00000505	UNITED STATES TREASURER
Administration Applications		000000518	UNITED STATES TREASURER
Configuration			
Management Tools	Z ×	000001009	U S DEPT AGRICULTURE FOOD & NUTRITION SERVICE O
Security	×	000001193	POSTAL MONEY ORDERS NATIONWIDE
System Codes and Settings Accounts	×	000008002	US POSTAL MONEY ORDERS
Financial ABA	☑ ×	000090007	SAVINGS BONDS
Banks Credit Card Type	✓ ×	011000015	FEDERAL RESERVE BANK OF BOSTON
Legal Ledger Types Payment Methods	✓ ×	011000028	STATE STREET BANK AND TRUST COMPANY
Payment Sub-Batch Type Salesman	2 ×	011000138	FLEET NATIONAL BANK
General Settings Organization Groups	2 ×	011000206	FLEET NATIONAL BANK
Parties	2 ×	011000390	BANK OF BOSTON, NATIONAL ASSOCIATION
	2 ×	011000536	FEDERAL HOME LOAN BANK OF BOSTON
	2 ×	011001234	BOSTON SAFE DEPOSIT AND TRUST COMPANY
	× ×	011001276	THE BOSTON BANK OF COMMERCE
	+		• Help
	Previous 5 1	2 3	2580 Next 5

Tip: To limit the records that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

2. Click the Edit icon. The **ABA** dialog box appears.

BA		
ABA 000000505 Bank		
UNITED STATES TREASUR		
Address		
FINANCIAL MANAGEMENT		
City		
WASHINGTON		
State		
DC		
Zip		
20227		
Country		
Country		
County		

ABA: Routing number that identifies the bank.

Bank: Name of the bank.

Address: Bank's street address.

City: Bank's city.

State: Bank's state.

Zip: Bank's ZIP Code.

Country: Bank's country.

County: Bank's county.

Phone: Bank's phone number.

Fax: Bank's fax number.

3. Modify the information and then click **Save**.

Delete an ABA Routing Number

Use the **ABA** panel to delete an ABA routing number.

To delete an ABA routing number

1. In the Navigation pane, click System Codes and Settings > Financial > ABA.

1		ABA	Bank Name
irch	Z ×	00000505	UNITED STATES TREASURER
Administration Applications	Z X	000000518	UNITED STATES TREASURER
Configuration		000001009	U S DEPT AGRICULTURE FOOD & NUTRITION SERVICE C
Management Tools Security	2 ×	000001003	0.3 DEFT AGREEDER FOOD & NOTATION SERVICE C
Services	🗷 🗙	000001193	POSTAL MONEY ORDERS NATIONWIDE
System Codes and Settings	×	000008002	US POSTAL MONEY ORDERS
Financial	✓ ×	000090007	SAVINGS BONDS
Banks Credit Card Type	×	011000015	FEDERAL RESERVE BANK OF BOSTON
Legal Ledger Types Payment Methods	x	011000028	STATE STREET BANK AND TRUST COMPANY
Payment Sub-Batch Type Salesman	✓ ×	011000138	FLEET NATIONAL BANK
General Settings Organization Groups	∠ ×	011000206	FLEET NATIONAL BANK
Parties	×	011000390	BANK OF BOSTON, NATIONAL ASSOCIATION
	×	011000536	FEDERAL HOME LOAN BANK OF BOSTON
	×	011001234	BOSTON SAFE DEPOSIT AND TRUST COMPANY
	×	011001276	THE BOSTON BANK OF COMMERCE
	+		• Help

Tip: To limit the records that display in the data grid, click one or more check boxes next to a column heading. In the **Filter** box, type one or more characters and then press **Enter**. To clear a filter, clear the check boxes and then click the Refresh icon.

2. Click the Delete icon and then click **Yes**.

Banks

Banks

You can search for, add, modify, and delete bank codes. Bank codes allow you to set up separate records for each trust account that accepts deposits of funds from your organization.

Search for a Bank

Use the **Bank** panel to search for a bank.

To search for a bank

1. In the Navigation pane, click System Codes and Settings > Financial > Banks.

Scope System	•				
21		C	Clear Filters		
Search		BankId	⊖Code	Display Name	Туре
Administration	2	4	00000	General Trust	General and Operating Trust
Applications Configuration	<u>2</u> ×	5	56565	TRUST ONE	Customer Trust
Management Tools	<u></u>	6	98989	TRUST TWO	Customer Trust
Security	+				
System Codes and Settings					O Help
🗎 Accounts 😁 Financial					
ABA Banks					

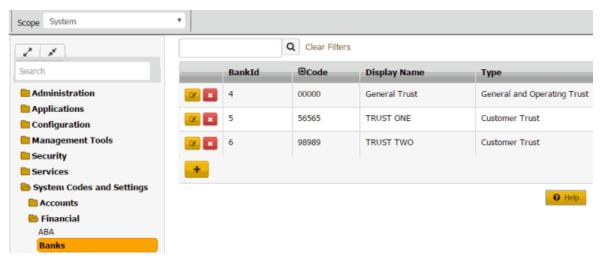
- 2. In the **Search** box in the **Bank** panel, type one or more characters to search and then press **Enter** or click the Search icon. The system searches the bank code, display name, and bank type for a match. It displays only the banks that match your search criteria.
- 3. To clear the search criteria, click Clear Filters. The system displays all banks.

Add a Bank

Use the **Bank Properties** dialog box to add a bank.

To add a bank

1. In the Navigation pane, click System Codes and Settings > Financial > Banks.



2. Click the plus sign (+). The **Bank Properties** dialog box appears.

Bank Properties		×
		A
Bank Information		
Bank Name	Name .	
Address 1	Address1	
Address 2	Address2	
City	City	
State	State	
Zip	Zip	
County	County	
Country	Country	
Phone	Phone	
Account Informat	ion	
Account Code	AccountCode •	÷
		Save Cancel

Bank Name: Name of the financial institution.

Address 1: First line of the financial institution's street address.

Address 2: Second line of the financial institution's street address.

City: Financial institution's city.

State: Financial institution's state.

ZIP: Financial institution's postal code.

County: Financial institution's county.

Country: Financial institution's country.

Phone: Financial institution's phone number.

Account Code: A numeric code up to five digits in length, that your organization uses to identify the account internally.

Account Title: Title for the account (could include a customer name).

ABA Routing: Nine-digit code that identifies the financial institution.

Checking Account Number: Your organization's checking account number for the trust account.

Starting Check Number: (optional) If your organization is printing checks using the Invoices program, type the first check number to use.

ISO Currency Code: Code that identifies the currency type and country. For example, the currency code for the United States is USD, which signifies United States dollar.

Latitude Printable Help for Administrators

Permit Deposit to General Trust Account: Allows money collected and split between linked accounts having different banks to deposit to the **General Trust** initially. Latitude only includes in the same payment arrangement accounts that deposit to the same trust or general trust.

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

Modify a Bank

Use the **Bank Properties** dialog box to modify a bank.

To modify a bank

1. In the Navigation pane, click System Codes and Settings > Financial > Banks.

Scope System	Y				
2.7		C	Clear Filters		
Search		BankId	Code	Display Name	Туре
Administration	2	4	00000	General Trust	General and Operating Trust
Applications Configuration	<u>2</u> ×	5	56565	TRUST ONE	Customer Trust
Management Tools		6	98989	TRUST TWO	Customer Trust
Security	+				
System Codes and Settings Accounts					😧 Help
ڬ Financial					
ABA Banks					

2. Click the Edit icon. The **Bank Properties** dialog box appears.

Bank Properties		×
		A
Bank Information		
Bank Name	Name .	
Address 1	Address1	
Address 2	Address2	
City	City	
State	State	
Zip	Zip	
County	County	
Country	Country	
Phone	Phone	
Account Informat	ion	
Account Code	AccountCode •	÷
		Save Cancel

Bank Name: Name of the financial institution.

Address 1: First line of the financial institution's street address.

Address 2: Second line of the financial institution's street address.

City: Financial institution's city.

State: Financial institution's state.

ZIP: Financial institution's postal code.

County: Financial institution's county.

Country: Financial institution's country.

Phone: Financial institution's phone number.

Account Code: A numeric code up to five digits in length, that your organization uses to identify the account internally.

Account Title: Title for the account (could include a customer name).

ABA Routing: Nine-digit code that identifies the financial institution.

Checking Account Number: Your organization's checking account number for the trust account.

Starting Check Number: (optional) If your organization is printing checks using the Invoices program, type the first check number to use.

ISO Currency Code: Code that identifies the currency type and country. For example, the currency code for the United States is USD, which signifies United States dollar.

Permit Deposit to General Trust Account: Allows money collected and split between linked accounts having different banks to deposit to the **General Trust** initially. Latitude only includes in the same payment arrangement accounts that deposit to the same trust or general trust.

3. Modify the information and then click **Save**.

Delete a Bank

Use the Banks panel to delete a bank.

To delete a bank

1. In the Navigation pane, click System Codes and Settings > Financial > Banks.

Scope System	•				
2.1		(Clear Filters		
Search	_	BankId	Ocode	Display Name	Туре
Administration	2	4	00000	General Trust	General and Operating Trust
Applications Configuration	2 x	5	56565	TRUST ONE	Customer Trust
🚞 Management Tools	2	6	98989	TRUST TWO	Customer Trust
Security	+				
System Codes and Settings					😧 Help
Accounts Financial ABA					
Banks					

2. Click the Delete icon and then click **Yes**.

Credit Card Types

Credit Card Types

You can search for, add, modify, and delete credit card types that your organization accepts for payment transactions. Users specify a credit card type when adding a credit card to a payment arrangement. For more information, see Add a Credit Card. The algorithm for the credit card determines whether it is a valid card.

Add a Credit Card Type

Use the Credit Card Type dialog box to add a credit card type.

To add a credit card type

1. In the Navigation pane, click System Codes and Settings > Financial > Credit Card Type.

Scope System	Ψ					
11		Code	Description	Validation Pattern	CVV2	Checksum
Search	8 ×	0001	Mastercard/Visa	$((?=4)4(?:\d{12} \d{15}) 5[1-5]\d{14})$$	Back	Luhn10
Administration Applications		0002	AMERICAN EXPRESS	^3[47]\d{13}\$	Front	Luhn10
Configuration Management Tools		0003	Discovercard	^6011\d{12}\$	Back	Luhn10
Security						
Services System Codes and Settings	+					_
Accounts						Help
Financial ABA						
Banks Credit Card Type						

2. Click the plus sign (+). The Credit Card Type dialog box appears.

Co	
o	dit Card Code
De	ription
D	scription
Val	lation Pattern
V	idation Pattern
cv	2
N	ne 🔹
Che	:ksum
N	ne
<u></u>	

Code: Unique code that identifies the credit card type.

Description: Commonly used name for the credit card type.

Validation Pattern: Expression used to identify the card. Click the ellipsis (...) and select a standard card type from the list.

CVV2: Indicates the location of the security code on the credit card.

Checksum: Formula to use to validate the credit card.

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

Modify a Credit Card Type

Use the Credit Card Type dialog box to modify a credit card type.

To modify a credit card type

1. In the Navigation pane, click System Codes and Settings > Financial > Credit Card Type.

ScopeSystem	•					
11	_	Code	Description	Validation Pattern	CVV2	Checksun
Search	8 ×	0001	Mastercard/Visa	$((?=4)4(?:\d{12} \d{15}) 5[1-5]\d{14})$$	Back	Luhn10
Administration		0000		101 - 11 - 11 - 1	Front	Luberto.
Applications		0002	AMERICAN EXPRESS	^3[47]\d{13}\$	Front	Luhn10
Configuration Management Tools	x	0003	Discovercard	^6011\d{12}\$	Back	Luhn10
E Security						
Services	+					
System Codes and Settings						😧 Help
Accounts						• nep
🝉 Financial						
ABA						
Banks Credit Card Type						

2. Click the Edit icon. The Credit Card Type dialog box appears.

Credit Card Type	
Code 0002 Description	
AMERICAN EXPRESS	
Validation Pattern	
^3[47]\d{13}\$	
CVV2	
No	
Checksum	
Luhn10	
	Save Cancel Apply

Code: Unique code that identifies the credit card type.

Description: Commonly used name for the credit card type.

Validation Pattern: Expression used to identify the card. Click the ellipsis (...) and select a standard card type from the list.

CVV2: Indicates the location of the security code on the credit card.

Checksum: Formula to use to validate the credit card.

3. Modify the information and then click **Save**.

Delete a Credit Card Type

Use the Credit Card Type panel to delete a credit card type.

To delete a credit card type

1. In the Navigation pane, click System Codes and Settings > Financial > Credit Card Type.

Scope System	*					
11	_	Code	Description	Validation Pattern	CVV2	Checksum
Search Administration	x	0001	Mastercard/Visa	$((?=4)4(?:\d{12} \d{15}) 5[1-5]\d{14})$$	Back	Luhn10
Applications	×	0002	AMERICAN EXPRESS	^3[47]\d{13}\$	Front	Luhn10
Management Tools	×	0003	Discovercard	^6011\d{12}\$	Back	Luhn10
Security	+					
System Codes and Settings Accounts						🛛 Help
Financial ABA						
Banks Credit Card Type						

2. Click the Delete icon and then click **Yes**.

Legal Ledger Types

Legal Ledger Types

You can search for, add, modify, and delete legal ledger types. Legal ledger types allow your organization group legal accounting ledger entries. You specify whether transactions assigned to a type apply as debits or credits, and whether invoices include the transactions. Users specify a ledger type when adding a legal ledger item to a legal case. For more information, see Add a Legal Ledger Item.

Add a Legal Ledger Type

Use the Legal Ledger Types panel to add a legal ledger type.

To add a legal ledger type

1. In the Navigation pane, click System Codes and Settings > Financial > Legal Ledger Types.

Scope System	*				
11		Code	Description	Is a Debit	Is Invoiceable
Search	x	001	FILING FEES EXPENDED		
Administration Applications Configuration	Z	002	PROCESS SERVER EXPENSE	ø	
Management Tools	x	003	COURT COSTS EXPENSE		
Security Services	2 ×	004	GARNISHMENT FEES	Ø	
System Codes and Settings Accounts	x	005	INVESTIGATOR FEES	¥.	
BRA ABA	×	006	COSTS ADV FR CUSTOMER		
Banks Credit Card Type	x	007	ADV COST FR OPERATING ACC		
Legal Ledger Types Payment Methods	x	008	COST RECOVERED FR DTR		
Payment Sub-Batch Type Salesman	+				O Help

2. Click the plus sign (+). A blank row appears in the data grid.

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	Code	Description	Is a Debit	Is Invoiceable
	001	FILING FEES EXPENDED	4	
	002	PROCESS SERVER EXPENSE	A.	
	003	COURT COSTS EXPENSE	A.	
	004	GARNISHMENT FEES	d.	
	005	INVESTIGATOR FEES	A.	
	006	COSTS ADV FR CUSTOMER		
	007	ADV COST FR OPERATING ACC		
	008	COST RECOVERED FR DTR		
× ~	Code *	Description *	Is a Debit	Is Invoiceable

Code: Unique code that identifies the legal ledger type.

Description: Description of the legal ledger type.

Is a Debit: If selected, the legal ledger type represents a debit transaction. If cleared, transactions assigned to this legal ledger type apply as a credit. These transactions do not affect the account balances in Latitude.

Is Invoiceable: If selected, the legal ledger type represents a transaction that you can invoice. These transactions appear on a separate Exchange AIM invoice. These transactions do NOT appear on standard Latitude invoices.

3. Complete the information and then click the check mark.

Modify a Legal Ledger Type

Use the Legal Ledger Types panel to modify a legal ledger type.

To modify a legal ledger type

1. In the Navigation pane, click System Codes and Settings > Financial > Legal Ledger Types.

1 1	_	Code	Description	Is a Debit	Is Invoiceable
earch	x	001	FILING FEES EXPENDED	2	
Administration Applications		002	PROCESS SERVER EXPENSE		
Configuration Management Tools	×	003	COURT COSTS EXPENSE	×.	
Security Services	x	004	GARNISHMENT FEES	×.	
System Codes and Settings Accounts	x	005	INVESTIGATOR FEES	ø	
Financial ABA	x	006	COSTS ADV FR CUSTOMER		
Banks Credit Card Type	x	007	ADV COST FR OPERATING ACC		
Legal Ledger Types Payment Methods	x x	008	COST RECOVERED FR DTR		
Payment Sub-Batch Type Salesman	+				Ø Help

2. Click the Edit icon. The legal ledger type appears in edit mode.

Code	Description	Is a Debit	Is Invoiceable
Code 001	Description FILING FEES EXPENDED	Is a Debit ✔	Is Invoiceable
002	PROCESS SERVER EXPENSE		
003	COURT COSTS EXPENSE	Ø	
004	GARNISHMENT FEES	×.	
005	INVESTIGATOR FEES	×.	
006	COSTS ADV FR CUSTOMER		
007	ADV COST FR OPERATING ACC		
008	COST RECOVERED FR DTR		

Code: Unique code that identifies the legal ledger type.

Description: Description of the legal ledger type.

Is a Debit: If selected, the legal ledger type represents a debit transaction. If cleared, transactions assigned to this legal ledger type apply as a credit. These transactions do not affect the account balances in Latitude.

Is Invoiceable: If selected, the legal ledger type represents a transaction that you can invoice. These transactions appear on a separate Exchange AIM invoice. These transactions do NOT appear on standard Latitude invoices.

3. Modify the information and then click the check mark.

Delete a Legal Ledger Type

Use the Legal Ledger Types panel to delete a legal ledger type.

To delete a legal ledger type

1. In the Navigation pane, click System Codes and Settings > Financial > Legal Ledger Types.

Scope System	•				
11		Code	Description	Is a Debit	Is Invoiceable
Search	x	001	FILING FEES EXPENDED	×.	
Administration Applications		002	PROCESS SERVER EXPENSE	2	
Configuration Management Tools	x	003	COURT COSTS EXPENSE	¥.	
Security Services	x	004	GARNISHMENT FEES	×.	
System Codes and Settings Accounts	2 ×	005	INVESTIGATOR FEES	¥.	
Binancial	x	006	COSTS ADV FR CUSTOMER		
Banks Credit Card Type	8 ×	007	ADV COST FR OPERATING ACC		
Legal Ledger Types Payment Methods	8 ×	008	COST RECOVERED FR DTR		
Payment Sub-Batch Type Salesman	+				O Help

2. Click the Delete icon and then click **Yes**.

Payment Methods

Payment Methods

You can search for, add, and modify payment methods. Users specify a payment method when creating a payment arrangement. For more information, see Propose a Payment Arrangement.

Add a Payment Method

Use the **Payment Method** dialog box to add a payment method.

To add a payment method

1. In the Navigation pane, click System Codes and Settings > Financial > Payment Methods.

arch		PMethod Id	Payment Method	Surcharge	Post Dated	Invoice Hold Days	NITD	Grace Days	Verbiage	Can Process Batch	Can Be Selected As Promise
Administration Applications	2	10	RESERVED	0		0	Letter	0	verblage		
Configuration Management Tools	Ø	11	UK DIRECT DEBIT	0		0		0		1	
Security Services System Codes and Settings	Ľ	4	WESTERN	0		0		0			Ø
Accounts	C.	1	CASH	0		0		0			2
ABA Banks	ľ	2	CHECK	0		0		0			
Credit Card Type Legal Ledger Types	C	3	MONEY ORDER	0		0		0			¥.
Payment Methods Payment Sub-Batch Type	Ø	9	MERCHANDISE RETURN	0		0		0			×.
Salesman General Settings	Ø	6	PAPER DRAFT	0	1	0		0			al and
Organization Groups Parties	Ø	8	POST-DATED CHECK	0 '	2	0	00200	0			¥.
	Ø	5	CREDIT CARD	0		0	00600	0		×.	
		7	ACH DEBIT	0	X	0	00600	0		¢۲	

2. Click the plus sign (+).

Payment Method

Payment Method:	Payment Method	•
Surcharge:	Surcharge	
Post Dated?:		
Invoice Hold Days:	Invoice Hold Days	
NITD Letters:		
Grace Days:	Grace Days	•
Verbiage:	Verbiage	
Can Process Batch?:		
Can Be Selected As Promise?:		
		Cancel Save

Payment Method: Means of payment in a payment arrangement.

Surcharge: Amount your organization adds to the account for payments received using this payment method (not applicable for MA accounts). Latitude adds this amount to bucket 10 when users add a payment to an account. For more information, see Surcharge Rules.

Post Dated?: If selected, this payment method is a post-dated entry. This option is available when adding post-dated check information for an account.

Invoice Hold Days: Number of days to wait before posting payments received to the client's invoice using this payment method.

NITD Letters: Notice of Intent to Deposit letters. Code that identifies the letter to generate when users add payments using this method. The letters available are based on the letters your organization configured using Letter Console.

Grace Days: Maximum number of days after the payment due date that the customer can submit a payment before the payment is considered late.

Verbiage: Text to display to the user when using this payment method in a payment arrangement.

Can Process Batch?: If selected, this payment method is available for selection as a batch type when processing payment batches using the Batch Processor.

Can Be Selected as Promise?: If selected, this payment method is available for selection when scheduling a payment promise.

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

Modify a Payment Method

Use the **Payment Method** dialog box to modify a payment method.

To modify a payment method

1. In the Navigation pane, click System Codes and Settings > Financial > Payment Methods.

ope System	•										
Administration		PMethod Id	Payment Method	Surcharge	Post Dated	Invoice Hold Days	NITD	Grace Days	Verbiage	Can Process Batch	Can Be Selected A Promise
Applications Configuration	C	10	RESERVED	0		0		0			
Management Tools	Ø	11	UK DIRECT DEBIT	0		0		0		ø	
Security Services System Codes and Settings		4	WESTERN	0		0		0			×.
Accounts Financial	C	1	CASH	0		0		0			ø
ABA Banks	ľ	2	CHECK	0		0		0			×.
Credit Card Type Legal Ledger Types	Ø	3	MONEY ORDER	0		0		0			
Payment Methods Payment Sub-Batch Type Salesman	Ø	9	MERCHANDISE RETURN	0		0		0			8
General Settings	Ø	6	PAPER DRAFT	0	¥.	0		0			w.
Organization Groups Parties	ľ	8	POST-DATED CHECK	0 '		0	00200	0			Ø
	C	5	CREDIT CARD	0		0	00600	0		1	¥.
	Ø	7	ACH DEBIT	0		0	00600	0			¥.
	+										Ø Help

2. Click the Edit icon.

Payment Method		×
Payment Method:	PAPER DRAFT	
Surcharge:	0	
Post Dated?:	×	
Invoice Hold Days:	0	
NITD Letters:		
Grace Days:	0	
Verbiage:	Verbiage	
Can Process Batch?:		
Can Be Selected As Promise?:	8	
	Cancel Save	

Payment Method: Means of payment in a payment arrangement.

Surcharge: Amount your organization adds to the account for payments received using this payment method (not applicable for MA accounts). Latitude adds this amount to bucket 10 when users add a payment to an account.

Post Dated?: If selected, this payment method is a post-dated entry. This option is available when adding post-dated check information for an account.

Invoice Hold Days: Number of days to wait before posting payments received to the client's invoice using this payment method.

NITD Letters: Notice of Intent to Deposit letters. Code that identifies the letter to generate when users add payments using this method. The letters available are based on the letters your organization configured using Letter Console.

Grace Days: Maximum number of days after the actual payment due date that the customer can submit a payment before the payment is considered late.

Verbiage: Text to display to the user when using this payment method in a payment arrangement.

Can Process Batch?: If selected, this payment method is available for selection as a batch type when processing payment batches using the Batch Processor.

Can Be Selected as Promise?: If selected, this payment method is available for selection when scheduling a payment promise.

3. Modify the information and then click **Save**.

Payment Sub-Batch Types

Payment Sub-Batch Types

You can search for, add, modify, and delete payment sub-batch types. Sub-batches allow you to further categorize payment types.

Add a Payment Sub-Batch Type

Use the Payment Sub-Batch Type panel to add a payment sub-batch type.

To add a payment sub-batch type

1. In the Navigation pane, click System Codes and Settings > Financial > Payment Sub-Batch Type.

Scope System	T		
11	_	Code	Description
Search	- X	PDC	ACH
Administration		PCC	СС
Configuration	∠ ×	ccs	Collection Costs
Security		RFD	Refund
System Codes and Settings		XFR	Transfer
Accounts Financial			
ABA Banks	+		0.000
Credit Card Type Legal Ledger Types			Help
Payment Methods			
Payment Sub-Batch Type			

2. Click the plus sign (+). A blank row appears in the data grid.

	Code	Description
	PDC	ACH
	PCC	сс
	ccs	Collection Costs
	PA	Paid Agency
	PAR	Paid Agency Reversal - NSF
	RFD	Refund
	XFR	Transfer
× ✓	Code *	Description *

Code: Unique three-character code that identifies the payment sub-batch.

Description: Description of the payment sub-batch.

3. Complete the information and then click the check mark.

Modify a Payment Sub-Batch Type

Use the Payment Sub-Batch Type panel to modify a payment sub-batch type.

To modify a payment sub-batch type

1. In the Navigation pane, click System Codes and Settings > Financial > Payment Sub-Batch Type.

Scope System	v		
11		Code	Description
Search	×	PDC	ACH
Administration Applications	2 ×	PCC	сс
Configuration Management Tools	Z X	ccs	Collection Costs
Security	×	RFD	Refund
System Codes and Settings Accounts	× ×	XFR	Transfer
Financial ABA	+		
Banks Credit Card Type	_		🕑 Help
Legal Ledger Types Payment Methods			
Payment Sub-Batch Type			

2. Click the Edit icon. The payment sub-batch appears in edit mode.

	Code	Description
<u> </u>	Code PDC	Description ACH
	PCC	сс
	CCS	Collection Costs
	PA	Paid Agency
	PAR	Paid Agency Reversal - NSF
	RFD	Refund
	XFR	Transfer

Code: Unique three-character code that identifies the payment sub-batch.

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Description: Description of the payment sub-batch.

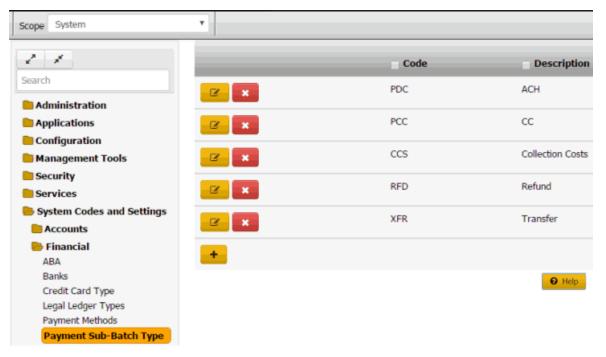
3. Modify the information and then click the check mark.

Delete a Payment Sub-Batch Type

Use the **Payment Sub-Batch Type** panel to delete a payment sub-batch type.

To delete a payment sub-batch type

1. In the Navigation pane, click System Codes and Settings > Financial > Payment Sub-Batch Type.



2. Click the Delete icon and then click **Yes**.

Salesman Codes

Salesman Codes

You can search for, add, modify, and delete salesmen. Users can assign an individual salesman to each client to track the number and value of accounts placed. The system also tracks the money collected and fees placed against accounts for each salesman in an office. For more information, see <u>Maintain Client</u> <u>Account Information</u>.

Add a Salesman

Use the Salesman dialog box to add a sales person.

To add a salesman

1. In the Navigation pane, click System Codes and Settings > Financial > Salesman.

Scope System *										
2 1		Sales Code	Name	Street Line 1	Street Line 2	City	State ZIP	Phone	County	Country
Search		00001	HOUSE							
Administration	×									
Applications	+									
Configuration	_									
🛅 Management Tools										🕑 Help
Security										
Services										
눧 System Codes and Settings										
Accounts										
😓 Financial										
ABA										
Banks Credit Card Type										
Legal Ledger Types										
Payment Methods										
Payment Sub-Batch Type										
Salesman										

 \times

2. Click the plus sign (+). The **Salesman** dialog box appears.

Salesman

Sales Code		
Sales Code -		
Name		
Name		
Street Line 1		
Street line 1		
Street Line 2		
Street line 2		
City		
City		
State		
State (e.g.: FL, WY, etc.)		
Zip		
Zip		
		NINGER .

Sales Code: Unique code that identifies the sales person.

Name: Sales person's full name, including first name, last name, and suffix.

Street Line 1: First line of the sales person's street address.

Street Line 2: Second line of the sales person's street address.

City: Sales person's city.

State: Sales person's state.

ZIP: Sales person's postal code.

Phone: Sales person's phone number, including area code.

County: Sales person's county.

Country: Sales person's country.

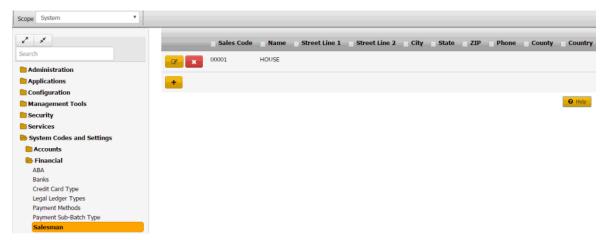
3. Complete the information and then click **Save**.

Modify a Salesman

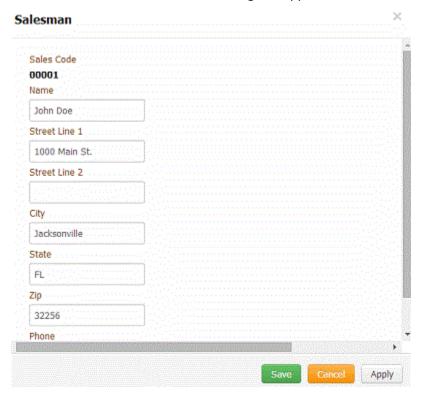
Use the Salesman dialog box to modify a sales person.

To modify a salesman

1. In the Navigation pane, click System Codes and Settings > Financial > Salesman.



2. Click the Edit icon. The Salesman dialog box appears.



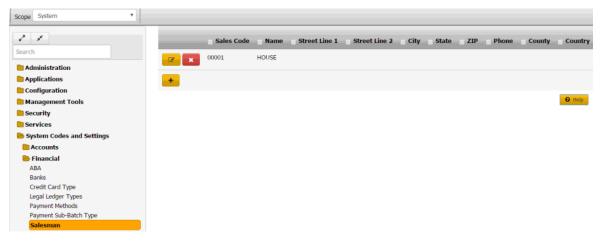
3. Modify the information and then click **Save**.

Delete a Salesman

Use the **Salesman** panel to delete a sales person.

To delete a salesman

1. In the Navigation pane, click System Codes and Settings > Financial > Salesman.



2. Click the Delete icon and then click **Yes**.

General Settings

General Settings

You can set up and configure law lists and state restrictions.

Law Lists

Law Lists

You can search for, add, modify, and delete law lists that your organization references when seeking the services of a collection attorney.

Add a Law List

Use the Law List dialog box to add a law list code.

To add a law list

1. In the Navigation pane, click System Codes and Settings > General Settings > Law List.

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1 1		Code	Description	You Got Claims II
Parch	x	CLL	Columbia Law List	125581575
Administration				
Applications	+			
Configuration	_			
Management Tools				Help
Security				
Services				
System Codes and Settings				
Accounts				
Einancial				
General Settings				
Batch Processor System				
Configuration for handling				
NSFs/Reversals				
Credit Cards				
Credit Report Requests Settings				
Customer Information Profiles				
Oirect Debit				
Enable Archive of Account Data				
Enable Latitude Payment Vendor				
Gateway				
Enable Latitude Service Request				
Gateway				
Settings				
Law List				

2. Click the plus sign (+). The Law List dialog box appears.

aw List		×
Law List Code		
Code	•	
Description		
Description	•	
You Got Claims ID		
You Got Claims ID	•	
		Save Cancel

Law List Code: Code that identifies the law list.

Description: Description or name of the law list.

You Got Claims ID: You've Got Claims identifier.

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

Modify a Law List

Use the **Law List** dialog box to modify a law list code.

To modify a law list

1. In the Navigation pane, click System Codes and Settings > General Settings > Law List.

Scope System				
1 1		Code	Description	You Got Claims ID
Search		CLL	Columbia Law List	125581575
Administration				
Applications	+			
Configuration	_			
Management Tools				O Help
Security				
Services				
System Codes and Settings				
Counts				
📄 Financial				
General Settings				
Batch Processor System				
Configuration for handling				
NSFs/Reversals				
Credit Cards				
Credit Report Requests Settings				
Customer Information Profiles				
Oirect Debit				
Enable Archive of Account Data				
Contraction Cateway Enable Latitude Payment Vendor Gateway				
Cateway				
Latitude WorkFlow Engine Settings				
Law List				

You Got Claims ID: You've Got Claims identifier.

2. Click the Edit icon. The Law List dialog box appears.

Law List		×
Law List Code		
Description		
Columbia Law List		
You Got Claims ID		
125581575		
		•
	Save Cancel Ap	oply

Law List Code: Code that identifies the law list.

Description: Description or name of the law list.

You Got Claims ID: You've Got Claims identifier.

3. Modify the information and then click **Save**.

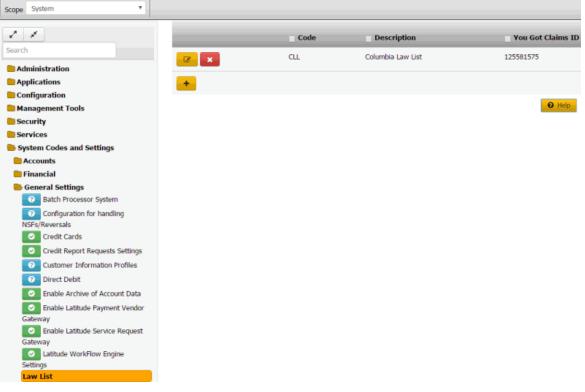
Latitude Printable Help for Administrators

Delete a Law List

Use the Law List panel to delete a law list code.

To delete a law list code

1. In the Navigation pane, click System Codes and Settings > General Settings > Law List.



2. Click the Delete icon and then click **Yes**.

State Restriction

State Restriction

You can add and modify state restrictions that control how the system handles accounts within specific states. For example, letter restrictions, printed advisories, warnings, and surcharges.

Add a State Restriction

Use the **State Restriction** dialog box to add a state restriction.

To add a state restriction

1. In the Navigation pane, click System Codes and Settings > General Settings > State Restriction.

System Codes and Settings

Scope System *			
21		Abbreviation	State
Search	2	AK	Alaska
Administration			
Applications	2	AL	Alabama
Configuration	_	10	Arkansas
Management Tools	R	AR.	Arkansas
Security	CZ .	AS	American Samoa
System Codes and Settings Accounts	2	AZ	Arizona
📙 Financial 🍉 General Settings	2	CA	California
Batch Processor System	2	со	Colorado
Configuration for handling NSFs/Reversals Credit Cards	ľ	ст	Connecticut
Credit Report Requests Settings	C2	DC	District of Columbia
Customer Information Profiles Direct Debit	Ľ	DE	Delaware
 Enable Archive of Account Data Enable Latitude Payment Vendor 	C2	FL	Florida
Gateway Cateway Catewa	C .	FM	Federated States of Micronesia
Gateway Cateway Latitude WorkFlow Engine	C2	GA	Georgia
Settings Law List	2	GU	Guam
Name Template Config Prevent Multiple Account Access	+		
SMTP Settings for Auxiliary Products	1 2 3	5	O Help

2. Click the plus sign (+). The **State Restriction** dialog box appears.

State Restriction State Abbreviation Abbreviation State Name State Name State Name State Name Max Collection Cost Max Collection Cost License Status License Status License Status Maxisory Advisory Text Warning

State Abbreviation: Unique code that identifies the state.

State Name: Full name of the state.

Max Collection Cost: Maximum collection cost percent the state allows. You can configure the client record to allow agents to override this percent for customers residing in the state.

License Status: Optional place to store licensing information.

Advisory: Advisory information to print on letters for customers residing in the state. The system inserts this information in letters when you include the **State_Legal_Advisory** merge field in the letter body.

Warning: Warning information to display in the **Warnings** dialog box for customers residing in the state.

Restrict Letters: If selected, the state restricts the letters you can send to customers residing in the state.

Permit a Wage Garnishment: If selected, the state allows administrative wage garnishment.

Permit Surcharge: If selected, the state allows collection of surcharges for customers residing in the state. If cleared, the surcharge option isn't available when creating payment arrangements.

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

Modify a State Restriction

Use the State Restriction dialog box to modify a state restriction.

To modify a state restriction

1. In the Navigation pane, click System Codes and Settings > General Settings > State Restriction.

Scope System			
21		Abbreviation	State
Search	2	AK	Alaska
Administration			
Applications	C2	AL	Alabama
Configuration		AR	Arkansas
Management Tools		АК	Arkansas
Security	C.	AS	American Samoa
System Codes and Settings Accounts	C .	AZ	Arizona
📄 Financial 🍉 General Settings	Z	СА	California
Batch Processor System	2	со	Colorado
Configuration for handling NSFs/Reversals	C C	ст	Connecticut
Credit Report Requests Settings	2	DC	District of Columbia
 Customer Information Profiles Direct Debit 	2	DE	Delaware
 Enable Archive of Account Data Enable Latitude Payment Vendor 	œ	FL	Florida
Gateway Gateway Image: Construct the service of the	2	FM	Federated States of Micronesia
Gateway Gateway Itatitude WorkFlow Engine	CZ .	GA	Georgia
Settings Law List		GU	Guam
Name Template Config Prevent Multiple Account Access	+		
SMTP Settings for Auxiliary Products	1 2 3	5	• Help

2. Click the Edit icon. The **State Restriction** dialog box appears.

State Abbreviation		
WY State Name		
Wyoming		
Max Collection Cost		
Max Collection Cost		
License Status		
Advisory		
	Advisory Text	
Warning		1
	Warning Text	물건의 영상 이 집에 올랐다.

State Abbreviation: Unique code that identifies the state.

State Name: Full name of the state.

Max Collection Cost: Maximum collection cost percent the state allows. You can configure the client record to allow agents to override this percent for customers residing in the state.

License Status: Optional place to store licensing information.

Advisory: Advisory information to print on letters for customers residing in the state. The system inserts this information in letters when you include the **State_Legal_Advisory** merge field in the letter body.

Warning: Warning information to display in the **Warnings** dialog box for customers residing in the state.

Restrict Letters: If selected, the state restricts the letters you can send to customers residing in the state.

Permit a Wage Garnishment: If selected, the state allows administrative wage garnishment.

Permit Surcharge: If selected, the state allows collection of surcharges for customers residing in the state. If cleared, the surcharge option isn't available when creating payment arrangements.

3. Modify the information and then click **Save**.

Organization Groups

Organization Groups

You can set up and configure various groups in Latitude. These groups allow you to streamline the process of granting permissions and assigning accounts. You can grant permissions to:

- An individual user.
- A role that you assigned to one or more users.
- A branch in your organization that you assigned to one or more users.
- A desk that you assigned to a user.
- A department in your organization.
- A team in your organization.

Branches

Branches

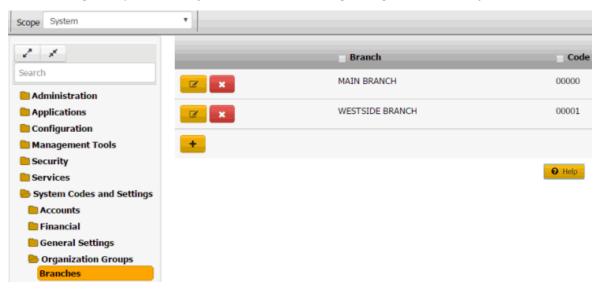
You can search for, add, modify, and delete branches. If you have more than one office (or branch), you can set up a branch and assign it to accounts to provide inventory separation by location.

Add a Branch

Use the **Branch** dialog box to add a branch.

To add a branch

1. In the Navigation pane, click System Codes and Settings > Organization Groups > Branches.



2. Click the plus sign (+). The **Branch** dialog box appears.

Branch Code	Code	•	
Manager	Manager		
Name	Name		
Address 1	Address1		
Address 2	Address2		
City	City		
State	State		
Zip	Zip		
Phone	Phone		
Phone 800 Number	Phone800		
Fax	Fax		
Comment	Comment		

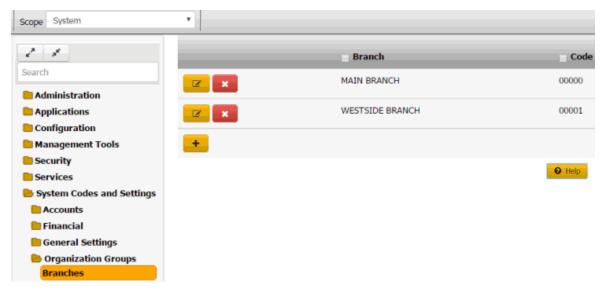
3. Complete the information and then click **Save**.

Modify a Branch

Use the **Branch** dialog box to modify a branch.

To modify a branch

1. In the Navigation pane, click System Codes and Settings > Organization Groups > Branches.



2. Click the Edit icon. The **Branch** dialog box appears.

Branch Code	Code	
Manager	Manager	
Name	Name	
Address 1	Address1	
Address 2	Address2]
City	City	
State	State	
Zip	Zip	
Phone	Phone	
Phone 800 Number	Phone800	
Fax	Fax	
Comment	Comment	

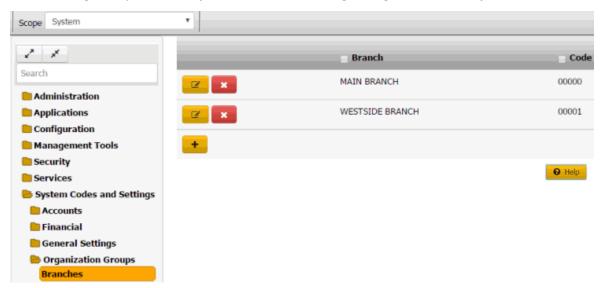
3. Modify the information and then click **Save**.

Delete a Branch

Use the **Branches** panel to delete a branch that your organization didn't assign to another entity, such as a user, department, or account.

To delete a branch

1. In the Navigation pane, click System Codes and Settings > Organization Groups > Branches.



2. Click the Delete icon and then click **Yes**.

Departments

Departments

You can search for, add, modify, and delete departments. You assign departments to a specific branch.

Search for a Department

Use the **Departments** panel to search for a department.

To search for a department

1. In the Navigation pane, click System Codes and Settings > Organizational Groups > Departments.

Scope System	T				
11		۹	Clear Filters		
Search		Department	•Name	Manager	Branch
Administration	Z X	3	3	GSadmin	00001
Applications Configuration	2 ×	1	COLLECTIONS DEPARTMENT	N/A	00000
Management Tools	2 x	2	WESTSIDE COLLECTIONS	N/A	00001
Security Services	+				
System Codes and Settings					• Help
Accounts					U help
Financial General Settings					
Organization Groups					
Branches Departments					

- 2. In the **Search** box in the **Departments** panel, type one or more characters to search and then press **Enter** or click the Search icon. The system searches the department code, name, manager, and branch for a match. It displays only the departments that match your search criteria.
- 3. To clear the search criteria, click **Clear Filters**. The system displays all departments.

Add a Department

Use the **Department** dialog box to add a department.

To add a department

1. In the Navigation pane, click System Codes and Settings > Organization Groups > Departments.

1 1	Q Clear Filters					
Search		Department	OName	Manager	Branch	
Administration	2 🗙	3	3	GSadmin	00001	
Configuration	2 ×	1	COLLECTIONS DEPARTMENT	N/A	00000	
Management Tools	<u>×</u>	2	WESTSIDE COLLECTIONS	N/A	00001	
Services	+					
System Codes and Settings Accounts Financial					O Help	
 General Settings Organization Groups Branches Departments 						

2. Click the plus sign (+). The **Department** dialog box appears.

Department								×
Name	Name							
Branch Code								
Manager	N/A 🔻							
	s	ave		Can	cel		Арр	ly

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

Modify a Department

Use the **Department** dialog box to modify a department.

To modify a department

1. In the Navigation pane, click System Codes and Settings > Organization Groups > Departments.

11					
Search		Department	⊕Name	Manager	Brancl
Administration	2 ×	3	3	GSadmin	00001
Applications Configuration	2 ×	1	COLLECTIONS DEPARTMENT	N/A	00000
Management Tools	×	2	WESTSIDE COLLECTIONS	N/A	00001
Services	+				
System Codes and Settings					O Help
Financial General Settings					
Organization Groups Branches Departments					

Latitude Printable Help for Administrators

2. Click the Edit icon. The **Department** dialog box appears.

Name	Name	
Branch Code		
Manager	N/A T	

3. Modify the information and then click **Save**.

Delete a Department

Use the **Departments** panel to delete a department.

To delete a department

1. In the Navigation pane, click System Codes and Settings > Organization Groups > Departments.

2.1		Q Clear Filters					
Search		Department	Name	Manager	Branch		
Administration	2 ×	3	3	GSadmin	00001		
Applications Configuration	2 ×	1	COLLECTIONS DEPARTMENT	N/A	00000		
Management Tools		2	WESTSIDE COLLECTIONS	N/A	00001		
Security	+						
System Codes and Settings					0.00		
Accounts					Help		
Financial							
General Settings							
Organization Groups							
Branches							

2. Click the Delete icon and then click **Yes**.

Roles

Roles

You can search for, add, modify, copy, and delete roles. Roles facilitate granting multiple permissions to multiple users who require the same permissions. For more information about permissions and policies for roles, see <u>Permissions and Policies</u>.

Add a Role

Use the **Role** dialog box to add a role. After adding a role, assign permissions to the role and assign the role to one or more users.

To add a role

3 4		
2 4	Role	Name
Search	1	Administrato
Administration		
Applications	6	Clerical
Configuration		
Management Tools	4	Collector
Security	7	Customer
Services	1	Customer
System Codes and Settings	5	Data Entry
Accounts	-	2000 2000 1
Einancial	8	Guest
General Settings		
🗁 Organization Groups	2	Manager
Branches		
Departments	9	NoPermissio
Teams	2	Comparison in the
User	3	Supervisor

1. In the Navigation pane, click System Codes and Settings > Organization Groups > Role.

2. Click the plus sign (+). The **Role** dialog box appears.

Role		×
Name		
Name		
	Save	Cancel

3. In the Name box, type the name of the new role and then click Save.

Modify a Role

Use the **Role** dialog box to modify the name of a role or view the users assigned to a role.

To modify a role

1. In the Navigation pane, click System Codes and Settings > Organization Groups > Role.

/ /		Role	Name
Search	C .	1	Administrato
Administration	_	6	Clerical
Applications Configuration		•	Cierical
Management Tools	C	4	Collector
Security	_		
Services	C C	7	Customer
System Codes and Settings		5	Data Entry
Accounts		-	,
📒 Financial	2	8	Guest
📒 General Settings			
<mark>)</mark> Organization Groups	C C	2	Manager
Branches			
Departments	2	9	NoPermissio
Role			
Teams		3	Supervisor
User			

2. Click the Edit icon. The **Role** dialog box appears.

Role													×.
User Name													
John Smith Alice Adams Jane Doe													
Name													
Collector													
					Sav	8	C	ank	el.		Ą	oply	y

User Name: Users assigned to the role.

3. In the Name box, modify the name of the role and then click Save.

Teams

Teams

You can search for, add, modify, and delete teams. You assign teams to a specific department.

Search for a Team

Use the **Teams** panel to search for a team.

To search for a team

1. In the Navigation pane, click System Codes and Settings > Organizational Groups > Teams.

1 1			Q Clear Filters			
Search		Team	Name	Supervisor	Department	Branch
Administration	2 🗙	1	BLUE TEAM	N/A	COLLECTIONS DEPARTMENT	MAIN BRANCH
Applications Configuration	2	3	DIALER	N/A	COLLECTIONS DEPARTMENT	MAIN BRANCH
Management Tools		4	SRG TEAM	N/A	COLLECTIONS DEPARTMENT	MAIN BRANCH
Security Services	2 ×	2	WESTSIDE TEAM	N/A	WESTSIDE COLLECTIONS	WESTSIDE BRANC
System Codes and Settings	+					
Accounts						
Financial						Help
📒 General Settings						• Help
Organization Groups						
Branches						
Departments						
Role						
Teams						

- In the Search box in the Teams panel, type one or more characters to search and then press Enter or click the Search icon. The system searches the team code, name, supervisor, department, and branch for a match. It displays only the teams that match your search criteria.
- 3. To clear the search criteria, click **Clear Filters**. The system displays all teams.

Add a Team

Use the **Team** dialog box to add a team code.

To add a team code

1. In the Navigation pane, click System Codes and Settings > Organization Groups > Teams.

1 1			Q Clear Filters			
Search		Team	Name	Supervisor	Department	Branch
Administration	2 🗙	1	BLUE TEAM	N/A	COLLECTIONS DEPARTMENT	MAIN BRANCH
Applications Configuration	x	3	DIALER	N/A	COLLECTIONS DEPARTMENT	MAIN BRANCH
Management Tools	2	4	SRG TEAM	N/A	COLLECTIONS DEPARTMENT	MAIN BRANCH
Security Services	2 *	2	WESTSIDE TEAM	N/A	WESTSIDE COLLECTIONS	WESTSIDE BRANC
System Codes and Settings	+					
Financial General Settings						O Help
Organization Groups Branches						
Departments Role						
Teams						

2. Click the plus sign (+). The **Team** dialog box appears.

Name	Name	-	
Department		•	
Manager	N/A	•	

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

Modify a Team

Use the **Team** dialog box to modify a team code.

To modify a team code

1. In the Navigation pane, click System Codes and Settings > Organization Groups > Teams.

Scope System						
11			Q Clear Filters			
Search		Team	Name	Supervisor	Department	Branch
Administration	2 *	1	BLUE TEAM	N/A	COLLECTIONS DEPARTMENT	MAIN BRANCH
Applications Configuration	2 *	3	DIALER	N/A	COLLECTIONS DEPARTMENT	MAIN BRANCH
Management Tools	2 x	4	SRG TEAM	N/A	COLLECTIONS DEPARTMENT	MAIN BRANCH
Security	2 *	2	WESTSIDE TEAM	N/A	WESTSIDE COLLECTIONS	WESTSIDE BRANCH
System Codes and Settings	+					
Accounts	_					
Financial General Settings						- O Help -
늘 Organization Groups						
Branches						
Departments Role						
Teams						

2. Click the Edit icon. The **Team** dialog box appears.

Name	WEST Team
Department	WESTSIDE COLLECTIONS
Manager	pbriggs - Pam Briggs

3. Modify the information and then click **Save**.

Delete a Team

Use the **Teams** panel to delete a team code.

To delete a team code

1. In the Navigation pane, click System Codes and Settings > Organization Groups > Teams.

1 1			Q Clear Filters			
Search		Team	Name	Supervisor	Department	Branch
Administration	2 🗙	1	BLUE TEAM	N/A	COLLECTIONS DEPARTMENT	MAIN BRANCH
Applications Configuration		3	DIALER	N/A	COLLECTIONS DEPARTMENT	MAIN BRANCH
Management Tools		4	SRG TEAM	N/A	COLLECTIONS DEPARTMENT	MAIN BRANCH
Security			WEETERS TRAN			
Services	2 *	2	WESTSIDE TEAM	N/A	WESTSIDE COLLECTIONS	WESTSIDE BRANC
b System Codes and Settings	+					
Accounts						
📒 Financial						Help
General Settings						• nep
Organization Groups						
Branches						
Departments						
Role						
Teams						

2. Click the Delete icon and then click **Yes**.

Users

Users

You can search for, add, and modify users; and activate or deactivate user accounts. However, you cannot delete user accounts.

You can modify permissions and policies for a user after assigning the user to a role. If you change the permission or policy for a role, the change affects the users assigned to that role, unless you set the permission or policy at the user level. For more information about permissions and policies for users, see <u>Permissions and Policies</u>.

Add a User

Use the **User** dialog box to add a user. You cannot set a user's password through the add feature. To set the user's password, add the user and then use the edit feature.

To add a user

1. In the Navigation pane, click System Codes and Settings > Organization Groups > User.

Z X Search	Only sho	w active users				
Administration Applications		User Name	Login Name	Desk Code	Branch Code	Alias Dialer Use
Configuration Management Tools	2	etchasoft	etchasoft			
Security Services	C.	NoPermission	np			
System Codes and Settings	C .	Collector2	c2	CI		
Einancial	Ø	GSAdmin2	gs2		00000	
 General Settings Organization Groups 	(C)	GSadmin	gs	0000000	00000	user1
Branches Departments Role	C C	Collector1	CI	CI	00000	
Role Teams User	C C	Pam Briggs	pbriggs	LIQUID	00001	
Parties	-					

Tip: To display active users only in the data grid, click **Only show active users**.

2. Click the plus sign (+). The User dialog box appears.

User Name:	User Name	
Login Name:	Login Name *	
Aliası	Alias	
Phone:	Phone	
Extension:	Extension	
Email:	Email	
Time Clock:	8	
Active:	8	
Role:	Administrator *	
Desk:		
Branch:	Ŧ	
Department:	v	

User Name: User's first and last name.

Login Name: User's logon name.

Alias: User's alias name such as a shortened version of the first name or a nickname.

Phone: User's telephone number

Extension: User's telephone extension number.

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

Time Clock: If selected, the system includes the user's logon and logoff times on the User Logon report.

Active: If selected, the user can log on to the system. If cleared, the user cannot log on to the system.

Role: User's role.

Desk: User's desk.

Branch: User's branch.

Department: User's department.

Dialer Login Credentials: Latitude uses these credentials to log on the user to a dialer automatically.

User Name: User's dialer logon name for a PureConnect or Genesys Cloud integration.

Password: User's dialer password for a PureConnect integration. Leave this box blank for a Genesys Cloud integration.

Third Party Credentials: Latitude uses these credentials to log on the user to a third-party system automatically.

User Name: User's logon name for the third-party system.

Password: User's password for the third-party system.

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

Modify a User

Use the **User** dialog box to modify a user.

To modify a user

1. In the Navigation pane, click System Codes and Settings > Organization Groups > User.

🖌 🗶 Search	Only sho	ow active users				
Administration Applications	n'no patinon	User Name	_ Login Name	Desk Code	Branch Code	Alias Dialer User
Configuration Management Tools	e.	etchasoft	etchasoft			
Security Services	C.	NoPermission	np			
System Codes and Settings	Ø	Collector2	c2	CI		
Accounts Financial	(C)	GSAdmin2	gs2		00000	
General Settings Organization Groups	Ø	GSadmin	gs	0000000	00000	user1
Branches Departments	C2	Collector1	a	CI	00000	
Role Teams User	Ø	Pam Briggs	pbriggs	LIQUID	00001	

Tip: To display active users only in the data grid, click Only show active users.

2. Click the Edit icon for the user account to modify. The **User** dialog box appears.

User Name:	BERNEY		
Login Name:			
Reset Password?			
Alias:	Alias		
Phone:	Phone		
Extension:	Extension		
Email:	Email		
Time Clock:			
Active:	8		
Role:	Collector	w	
Desk:	C1	w	
Branch:	None	*	-

User Name: User's first and last name.

Login Name: User's logon name.

Reset Password: If selected, displays the Password box to allow you to change it.

Password: User's password. Periods display instead of the typed characters.

Note: Latitude uses the 512-bit Secure Hash Algorithm (SHA-512) with a randomly generated 512bit 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.

Alias: User's alias name such as a shortened version of the first name or a nickname.

Phone: User's telephone number

Extension: User's telephone extension number.

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

Time Clock: If selected, the system includes the user's logon and logoff times on the User Logon report.

Active: If selected, the user can log on to the system. If cleared, the user cannot log on to the system.

Role: User's role.

Desk: User's desk.

Branch: User's branch.

Department: User's department.

Dialer Login Credentials: Latitude uses these credentials to log on the user to a dialer automatically.

User Name: User's dialer logon name for a PureConnect or Genesys Cloud integration.

Password: User's dialer password for a PureConnect integration. Leave this box blank for a Genesys Cloud integration.

Third Party Credentials: Latitude uses these credentials to log on the user to a third-party system automatically.

User Name: User's logon name for the third-party system.

Password: User's password for the third-party system.

3. Modify the information and then click **Save**.

Activate or Deactivate a User Account

Use the **User** dialog box to activate or deactivate a user account, which determines whether a user can log on to Latitude.

To activate or deactivate a user account

1. In the Navigation pane, click System Codes and Settings > Organization Groups > User.

	User Name					
1000 C		Login Name	Desk Code	Branch Code	Alias	Dialer User
œ	etchasoft	etchasoft				
(CR	NoPermission	np				
Ø	Collector2	c2	CI			
œ	GSAdmin2	gs2		00000		
œ	GSadmin	gs	0000000	00000		user1
C.	Collector1	CI	CI	00000		
Ø	Pam Briggs	pbriggs	LIQUID	00001		
	2 2 2	Collector2 Collector2 CSAdmin2 CC Collector1 CC Collector1 CC Parm Briggs	Image: Collector2 c2 Image: Collector2 c2 Image: Collector2 gs2 Image: Collector1 gs Image: Collector1 C1 Image: Collector2 pbriggs	Image: Collector2 c2 C1 Image: Collector2 gs2 Image: Collector1 gs 0000000 Image: Collector1 C1 C1 Image: Collector1 C1 C1 Image: Collector1 C1 C1	Collector2 C2 C1 C GSAdmin2 gs2 00000 GSadmin gs 0000000 00000 Collector1 C1 C1 00000 Pam Briggs pbriggs LIQUID 00001	Collector2 C2 C1 C2 GSAdmin2 gs2 00000 C2 GSadmin gs 000000 C2 GSadmin gs 000000 C2 Collector1 C1 C1 C2 Pam Briggs pbriggs LIQUID 00001

Note: To display active users only in the data grid, click Only show active users.

2. Click the Edit icon. The User dialog box appears.

User Name:	and a second sec		
Login Name:			
Reset Password?	0		
Alias:	Alias		
Phone:	Phone		
Extension:	Extension		
Email:	Email		
Time Clock:			
Active:	8		
Role:	Collector	w	
Desk:	C1	w	
Branch:	None	Ŧ	

- 3. Do one of the following:
 - To activate the user account, select the **Active** check box.
 - To deactivate the user account, clear the **Active** check box.

Party Codes

Party Codes

You can set up and configure system codes that users can assign to parties associated to an account.

Asset Types

Asset Types

You can search for, add, modify, and delete asset types. Users specify an asset type when maintaining assets for a party on an account. For more information, see Maintain Assets.

Add an Asset Type

Use the Asset Types panel to add an asset type.

To add an asset type

1. In the Navigation pane, click System Codes and Settings > Parties > Asset Types.

Scope System	Y		
11		Code	Description
Search	Z X	OTHE	Other
Administration Applications	×	AUTO	Automobile
Configuration	—	REAL	Real Property
Security Services	2 ×	BANK	Bank Account
System Codes and Settings Accounts	×	SECU	Securities
Financial General Settings	C ×	PERS	Personal Property
Organization Groups	2 ×	BEQU	Business Equipment
Asset Types Language Codes	Z X	FEQU	Farm Equipment
J. J. J	- X	RETI	Retirement Plan
	+		🛛 Help

2. Click the plus sign (+). A blank row appears in the data grid.

	Code	Description
	OTHE	Other
	AUTO	Automobile
	REAL	Real Property
	BANK	Bank Account
	SECU	Securities
	PERS	Personal Property
	BEQU	Business Equipment
	FEQU	Farm Equipment
	RETI	Retirement Plan
× •	Code *	Description *

Code: Unique code that identifies the asset type.

Description: Description of the asset type.

3. Complete the information and then click the check mark.

Modify an Asset Type

Use the **Asset Types** panel to modify an asset type.

To modify an asset type

1. In the Navigation pane, click System Codes and Settings > Parties > Asset Types.

Scope System	¥		
11		Code	Description
Search	Z X	OTHE	Other
Applications	×	AUTO	Automobile
Configuration	8	REAL	Real Property
Escurity	Z X	BANK	Bank Account
System Codes and Settings Accounts	Z X	SECU	Securities
🖿 Financial 🛅 General Settings	a	PERS	Personal Property
Organization Groups	2 ×	BEQU	Business Equipment
Asset Types Language Codes	Z X	FEQU	Farm Equipment
	Z	RETI	Retirement Plan
	+		• Help

2. Click the Edit icon. The asset type appears in edit mode.

	Code	Description
3	OTHE	Description Other
	AUTO	Automobile
	REAL	Real Property
	BANK	Bank Account
	SECU	Securities
	PERS	Personal Property
	BEQU	Business Equipment
	FEQU	Farm Equipment
	RETI	Retirement Plan

Code: Unique code that identifies the asset type.

Description: Description of the asset type.

3. Modify the information and then click the check mark.

Delete an Asset Type

Use the Asset Types panel to delete an asset type.

To delete an asset type

1. In the Navigation pane, click System Codes and Settings > Parties > Asset Types.

1 1		Code	Description
iearch	2 x	OTHE	Other
Administration			
Applications	Z ×	AUTO	Automobile
Configuration		REAL	Real Property
Management Tools	× ×	112112	
Services	Z	BANK	Bank Account
System Codes and Settings		SECU	Securities
Accounts	2 ×	3600	Securities
🛅 Financial		PERS	Personal Propert
General Settings			
Organization Groups	- 2 x	BEQU	Business Equipm
Parties		55011	En En la compañía de
Asset Types Language Codes	✓ ×	FEQU	Farm Equipment
anguige coore		RETI	Retirement Plan

2. Click the Delete icon and then click **Yes**.

Language Codes

Language Codes

You can search for, add, modify, and delete language codes. Users can assign language codes when maintaining a party on an account. For more information, see Maintain Contact Information.

Add a Language Code

Use the Language Codes panel to add a language code.

To add a language code

1. In the Navigation pane, click System Codes and Settings > Parties > Language Codes.

Scope System	•		
11		Code	Name
Search	Z X	0001	English
Administration			
Applications	🐷 💌	0002	SPANISH
Configuration			
🛅 Management Tools	+		
Security			
Services			Help
System Codes and Settings			
Accounts			
🖿 Financial			
General Settings			
📒 Organization Groups			
📄 Parties			
Asset Types			
Language Codes			

2. Click the plus sign (+). A blank row appears in the data grid.

	Code	Name
	0001	English
	0002	SPANISH
× •	Code *	Name *

Code: Unique code that identifies the language type.

Name: Name of the language.

3. Complete the information and then click the check mark.

Modify a Language Code

Use the Language Codes panel to modify a language code.

To modify a language code

1. In the Navigation pane, click System Codes and Settings > Parties > Language Codes.

System Codes and Settings

Scope System	*		
11		Code	Name
Search	Z ×	0001	English
Administration			
Applications	🕜 🗙	0002	SPANISH
Configuration			
Management Tools	+		
Security			
Services			Help
🍉 System Codes and Settings			
Accounts			
🖿 Financial			
General Settings			
Organization Groups			
📄 Parties			
Asset Types			
Language Codes			

2. Click the Edit icon. The language code appears in edit mode.

_	Code	Name	
	Code	Name	
	0001	English	
	0002	SPANISH	

Code: Unique code that identifies the language type.

Name: Name of the language.

3. Modify the information and then click the check mark.

Delete a Language Code

Use the Language Codes panel to delete a language code.

To delete a language code

1. In the Navigation pane, click System Codes and Settings > Parties > Language Codes.

Scope System	*		
11	_	Code	Name
Search		0001	English
Administration			
Applications	x	0002	SPANISH
Configuration			
Management Tools	+		
Security			
Services			Help
System Codes and Settings			
Accounts			
🖿 Financial			
General Settings			
Organization Groups			
😓 Parties			
Asset Types			
Language Codes			

2. Click the Delete icon and then click **Yes**.

Data Grids

Data Grids

A data grid displays information in a table format (rows and columns). Each row represents a single record and each column represents a single data item. If a column in a data grid contains no data, either the user or the system didn't provide that data. If the number of records in a data grid exceeds the maximum allowed to display on a single page, a navigation bar appears at the bottom of the data grid.

Some data grids allow you to:

- Sort the data by a single column in ascending or descending order. For more information, see Sort Data in a Data Grid.
- Limit the data that displays based on one or more criteria you specify. For more information, see <u>Filter Data in a Data Grid</u>.

Sort Data in a Data Grid

Some data grids allow you to sort the data by a single column in ascending or descending order.

To sort data in a data grid

- 1. Click a column heading to sort the data grid in ascending order by that column. An "up" arrow appears next to the column heading.
- 2. Click the column heading again to sort the data grid in descending order by that column. A "down" arrow appears next to the column heading.

Filter Data in a Data Grid

Some data grids allow you to limit the data that displays based on one or more criteria. If you set a filter for a column, the filter icon has a white background color. You can set a filter for more than one column at a time.

To filter data in a data grid

1. Select the check box for the column to set limits. A **Filter** box appears.

	Filter	
0	✓ Name	Url
×.	Party	workform/anchorCells/customer.tmpl.html
Ø	Delinquency	workform/anchorCells/delinquency.tmpl.html
R	Account State	workform/anchorCells/accountState.tmpl.html
Ø	Hot Note	workform/anchorCells/hotnote.tmpl.html
Ø	Account Status	workform/anchorCells/accountStatus.tmpl.html
Ø	Contact	workform/anchorCells/contact.tmpl.html
8	AIM	workform/anchorCells/aim.tmpl.html
ß	Charge Off Details	workform/anchorCells/chargeOffDetails.tmpl.html
8	Pending Payments	workform/anchorCells/pendingPayments.tmpl.html
B.	1st Party Active Collections	workform/anchorCells/firstPartyActiveCollections.tmpl.html
8	Account Label	workform/anchorCells/accountLabel.tmpl.html
C.	Process Orchestration	workform/anchorCells/processOrchestration.tmpl.html

- 2. In the **Filter** box, type one or more characters and then click the Refresh icon. The system only displays the rows that match the specified criteria.
- 3. To set more filters, select a check box and specify the criteria in the corresponding **Filter** box.
- 4. To remove a filter, clear the check box and then click the Refresh icon.

Move Between Pages of a Data Grid

Sometimes the number of records in a data grid exceeds the maximum allowed to display on a single page. In that case, the system displays a navigation bar at the bottom of the data grid to allow you to move between pages of the data grid.

To move between pages of a data grid

- 1. Click a page number to display that specific page.
- 2. Click **Previous** to display the previous page.
- 3. Click **Next** to display the next page.