Latitude® Release Notes

Version 2023 R1

Last updated May 22, 2023

Abstract

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

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

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Introduction to Release Notes

The Release Notes include all new features and visible changes introduced in Latitude 2020 R1 and later, and its related products and components. The release includes a system-generated New Features and Summary file that provides detailed lists of public changes in the release. These files are available in the Latitude Documentation Library.

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Abstract

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

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AIM

AIM 2020 R1 includes the following new features.

Notes

Updated notes export file to include user-generated events that occurred in Latitude after account placement.

- Added user-generated events that occurred in Latitude to the Notes (CNOT) export file. The system doesn't include system-generated notes and events in the export file.
- Added user-generated events that you received from the agencies or attorneys holding the accounts to the Notes (ANOT) import file. The system doesn't include system-generated notes and events in the import file.

Phone consent

- Added phone consent to the Demographics Export File Phone Panel record in the Demographics (CDEM) export file.
- Added phone consent to the Demographics Import File Phone Panel record in the Demographics (ADEM) import file.

AIM

AIM Help 2021 R1 includes the following new features.

Compliance Changes

- Added a new record type to AIM to support the agency reporting the validation notice to the account owner.
- Added new fields to AIM/AIM Receiver to support providing consent for phone and email along with the preferred contact method to and from the agency.
- Modified AIM and AIM Receiver to include itemization data for new business and maintenance.
- Modified AIM to allow passing preferred method of communication and call time preferences/restrictions in new business and maintenance
- Modified AIM Receiver to allow for loading preferred method of communication and call time preferences/restrictions.
- New AIM record types (CEML, AEML) are required to pass the preferred method of communication in addition to email address data.
- Version 10 does not support email types or multiple email addresses. However, liquid supports multiple email addresses.
- In AIM, the type code mentioned as blank and primary marked email are only passed.
- Added Itemization fields in the Demographics Export File Phone Panel Record.
- Added call consent and call preferences fields in the Placement Export File Account Record.

AIM

AIM 2022 R1 includes the following new features.

Historic Transactions

- Added new record CHST under CPLC placement file to export Historic Transactions.

AIM Receiver

AIM Receiver 2020 R1 includes the following new features.

Phone consent

- Added phone consent to the Demographics (CDEM) import file.
- Added phone consent to the Demographics (ADEM) export file.

API

APIs in 2022 R1 includes the following new end points

New API's are developed exposing the following functionality:

- That returns the configuration details stored in Create Scheduled Payments permission.
- To add a series of one or more scheduled payments that will be processed on the portal or in Latitude.
- Process payment via card or ACH in real-time.
- Post a payment against an account where the payment was processed via another platform such as a Self-Service Portal or Client System in a similar manner as if the payment was posted in Latitude.
- To store a previously obtained payment instrument token for Cards in the tokenizer and wallet for future payments.
- Add new Card instruments to the wallet to be used for payments
- Add new banking instruments to the wallet to be used for payments

Account Analysis

The Account Analysis tool for 2020 R1 includes the following new features.

Collateral conditions

Added the following collateral conditions for querying accounts based on collateral data or Recovery Database Network (RDN) system data:

- Collateral
- Collateral Auction
- Collateral Auction Appraisal
- Collateral Auction Bid
- Collateral Auction Repair Bid
- Collateral Lease
- Collateral Real Estate
- Collateral Repo Agency
- Collateral Repossession
- Collateral Repo Status
- RDN Master

Account Analysis

The Account Analysis tool for 2021 R1 includes the following new features.

Accounts

Added the following accounts conditions for querying accounts

- Validation Notice
- Itemization Balance
- Call Consent

Phones Master

Added the following phones master conditions for querying accounts

- Consent
- Call Preferences

Email

Added the following email conditions for querying accounts

- Email

Latitude® Release Notes

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Dashboard

Dashboard 2023 R1 includes the following new features and permissions:

SAVED QUERY :

- Updated Dashboard to show only system queries when setting up a Saved Query as a Datasource.
- Any user queries associated with existing dashboards have been migrated as system queries and also created as user queries.

Exchange Manager

Exchange Manager 2020 R1 includes the following new features.

Import and export

Added the following tables to Exchange manager to allow importing collateral data from, and exporting collateral data to the Recovery Database Network (RDN) system.

- Collateral Table
- Collateral Auction Table
- Collateral Auction Appraisal Table
- Collateral Auction Bid Table
- Collateral Auction Repair Bid Table
- Collateral Lease Table
- Collateral Real Estate Table
- Collateral Repossession Table
- RDN Master Table

Exchange Manager

Exchange Manager 2022 R1 includes the following new features.

Exchange Schema

- Exchange Schema is modified to add Historical Transactions for New Business and Maintenance

Introduction to Release Notes

The Release Notes include all new features and visible changes introduced in Latitude 2020 R1 and later, and its related products and components. The release includes a system-generated New Features and Summary file that provides detailed lists of public changes in the release. These files are available in the Latitude Documentation Library.

Job Manager

Job Manager 2022 R1 includes the following new features.

Automation

- Using the web API job category in Job Manager, Account Analysis queries can be executed automatically.

Job Manager

Job Manager 2020 R1 includes the following new features.

Job categories

Added the **Web API Job** category to allow updates to Recovery Database Network (RDN) cases.

Latitude

Latitude 2023 R1 includes the following new features and permissions.

Script Builder for System Level Queries

This feature adds the ability in account analysis to create queries managed at the system level that are not owned by a specific user. This can be achieved if the permission "Create System Queries" is enabled for the logged-in user. These system queries can then be used to create Custom Panels, prepare merge fields for Script Builder or Communication Templates, create conditional scripts for Script Builder and as data sources for dashboards**.**

- Provides the ability to create queries managed at the system level and not owned by a specific user.
- Scripting tool requires system level queries for conditional scripts.
- Merge field in the script needs to use system level query results.
- Custom panel mapping requires system level queries for panel content.
- Removed the script query designer from the scripting tool.
- Deleting or changing a system level query does check usage of the query in other tools and applications.
- Digital communication template needs to use system level query results as merge fields not standard mail merge fields.

Policies and Permission

- Added system level queries permission. For more information, see Create System level Queries Permission.
- Query tool observes permission when user attempts to save a query.
- Users with permission may save new or modified system level queries.
- All tools that use Query tool now support system level queries and policy.

Digital Communications Enhancements

- Existing email functionality is enhanced to allow attachments in outbound emails. A new permission has been created to configure this functionality. The attachments will also be visible in the Communication reference panel after sending an email. Also created a new plugin for Genesys Cloud for both outbound and inbound email which will allow users to configure Genesys Cloud as an email gateway.

Policies and Permissions

- Ability to attach documents to outbound email now be controlled by a new permission.
- Based on permission, User may either attach an existing document on the account & generate a pdf of a standard letter or attach an external file.

SAML 2.0 Configuration

SAML 2.0 is an authentication method across the entire Latitude product suite in addition to the existing authentication methods (Latitude login, Windows AD login).

Policies and Permissions

- Ability to support for SSO authentication via SAML 2.0 for all Latitude applications including both browser-based and installed applications.

Latitude

Latitude 2022 R2 includes the following new features and permissions.

Permissions and Policies

Consumer Facing Self Service Portal

This includes self-service options that allow customers to do-it-yourself when it comes to make their payments, view their account details/history and update personal/demographic data. Customer can manage their debt on their own, using the portal. A customer self-service portal doesn't require an agent to intervene, hence, creating a more seamless experience for the consumer. In addition to the available permissions/policies,the below permissions/policies are added to Administration -> Application -> Portal:

1. Policy to Customize the Portal brandings like custom color palette and customer logos and images.
2. Policy to customize the two or more fields that are used by a debtor to authenticate on the portal.
3. Enable / disable features that are available on the portal.

- **Localization Capability for Browser UI**

This will provide localization support for browser-based applications including Agent Desktop, Agent Scripting. This capability is configured at System/Role/User levels. New permissions/policies are created to customize the user interface elements, Date/Time formats and the currency symbol used throughout the application. The below permissions/policies are added to the Administration -> Localization:

1. Account Data policy to customize the currency symbol and currency formatting and default phone number formatting
2. User Interface policy to customize the Language pack and Date/Time format.

- **UX/General Functionality Enhancements**

Context menus and also providing display of add/edit capability in Customer Task panel for addresses and emails. Also added the Application Log app available in web to view all the system events (Events not associated with a specific account).

Administration -> Management Tools -> Access Application Log

Latitude

Latitude 2020 R2 includes the following new features and permissions.

Account Reactivation

Added ability to reinstate an account and unreturn an account.

Reassign an account to desk

Added ability to reassign an account to your own desk under certain conditions.

Set a Timed Reminder

Added ability to set a reminder for an account associated to your desk and have the reminder appear at a specific date and time.

Maintain Account Restrictions

Added ability to set restrictions that indicate an account requires special handling, for account such as attorney, bankruptcy, deceased, or CCCS information.

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 **SMTP Permission** 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**.
- Added ability to **Print a letter**.

Latitude

Latitude 2021 R1 includes the following new features and permissions.

Permissions

- Added Compliance Settings for the following:
    - Credit Bureau Reporting
    - Validation Notice Tracking.
    - Call Attempts and Conversation Limits
- Added Access Script Builder Permission for specifying whether users can create and update Scripts.

Reference panels

- Added ability to add notes in Events Panel for an account.
- Added ability to view attempts/conversations, validation notice details, itemization details, and preferred time to call details as part of compliance panel.
- Added ability to apply preferences/restrictions to phone numbers.

System Codes and Settings

- Added ability to add, modify, and delete holiday calender.
- Added ability to modify date and phone number using the localization code.

Script Builder

- Added ability to create and modify Script Query.
- Added ability to create, modify, copy, group, delete Script Query Conditions.
- Added ability to create, modify, delete, and view history of Scripts.

Arrangements

- Added ability to prevent adding expired credit card, address validation.

Payments

- Added ability to decline payments for repay, when the information provided is incorrect.

Compliance

- Added ability to validate notice provided to customer/debtor verbally.
- Added ability to view the conversations held.

Warnings

- Added ability to view validation status warnings for an account.

Mail Return

- Added ability to manage mail return.

Latitude

Latitude 2020 R1 includes the following new features and permissions.

Permissions

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

PureCloud 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.

Reference panels

Added a **Collateral** panel for maintaining automotive and non-automotive collateral information for an account.

System codes and settings

- Added **Third Party Credentials** to the **User** dialog box to allow Latitude to log on users to a third-party system automatically.
- Added user-defined list codes to the **List Data** panel for the following:
    - Bankruptcy Reaffirm Method
    - Bankruptcy Status
    - Bankruptcy Surrender Method
    - Prefix
    - Suffix

Task panels

Added the **RDN Integration** panel to create and update vehicle recovery cases for the account. This panel integrates with the Recovery Database Network (RDN) system to allow the exchange of recovery data.

Latitude

Latitude 2022 R1 includes the following new features and permissions.

Permissions and Policies

- New permissions have been created under Digital Communication > SMS, which is used when sending SMS to debtors
    - Gateway configuration defined at System & Client Scope. The plugin used to send and receive SMS is configured here. Each plugin setting must be separated by a new line. There's also inbuilt support to integrate other vendor plugins. Genesys Cloud SMS plugin is built into the system
    - Allow sending SMS – System, Client, Role & User Scopes. SMS is sent only if this is enabled
    - Consider SMS as Attempt – System level. This is also added as a new option under State Restriction setting. Update State Restriction setting documentation accordingly. Sending an SMS is considered as an attempt and the number of attempts in the Compliance panel are incremented if this is enabled
    - Consider SMS as Contact – System level. This is also added as a new option under State Restriction setting. Update State Restriction setting documentation accordingly. Sending an SMS is considered as a contact and the number of contacts in the Compliance panel are incremented if this is enabled
    - Consider SMS as Worked – System, Client. Sending an SMS is considered as worked if this is enabled
    - Consider SMS as Bad – System, Client. Phone number is updated as Bad on delivery failure if this is enabled.
- New permissions have been created under Digital Communication > Email, which is used when sending emails to debtors
    - Gateway configuration defined at System & Client Scope. Plugin used to send and receive emails is configured here. SMTP, IMAP is the recommended plugin. Each plugin setting must be separated by a new line. There's also inbuilt support to integrate other vendor plugins
    - Allow sending Email – System, Client, Role & User Scopes. Email is sent only if this is enabled
    - Consider Email as Attempt – System level. This is also added as a new option under the State Restriction setting. Update State Restriction setting documentation accordingly. Sending an email is considered as an attempt and the number of attempts in the Compliance panel are incremented if this is enabled
    - Consider Email as Contact – System level. This is also added as a new option under the State Restriction set. Update State Restriction setting documentation accordingly. Sending an email is considered as a contact and the number of contacts in the Compliance panel is incremented if this is enabled

  - Consider Email as Worked – System, Client. Sending an email is considered as worked if this is enabled
  - Consider Email as Bad – System, Client. Email address is updated as Bad on delivery failure if this is enabled
  - Allow Attachments - System level. If allow attachment enabled, must specify file share to house attachments
- Added a new policy under WebAccess → Website User Policy as 'User Can Upload and Download files to the web Server' where users can save upload location and download location for files.
- A new policy named “Restrict Card Payments to Debit Cards Only” is added to restrict card types to only debit type cards at the System/Line of Business/Client scope. The policy would go under the "Credit Card" subtype folder under Scheduled Payments > Business Rules

Reference Panels

- Added a table named dbo.HistoricalTransactions and Reference panel to show the data from dbo.HistoricalTransactions

System codes and settings

- A new letter configuration called Communication Templates has been created to configure if a letter code can be sent as a letter, email, or SMS.
  - A designer to create email/SMS is added for the user to create templates.
  - A list of merge fields is provided to inject any data from Latitude while rendering the templates.
- Added the customer groups under System Codes & Settings in Administration.
  - In the Navigation pane, click System Codes and Settings > Customer Groups > Custom Customer Groups.
  - Use the Custom Customer Groups dialog box to add, modify, and delete Customer Groups.

    Fields and the description of customer group dialogue.

    Name: Custom Customer Group name

    Description:Description of the Custom Customer Group

    Display Group in Invoice application: If selected the Custom Customer Group is added in Invoice application.

    Display Group on Statistics Console: If selected the Custom Customer Group is added on Statistics console.

    Client: Select the clients, which must be part of the current custom-customer group.

Digital Communication (SMS and Email)

- Added ability to send outbound SMS from Communication, phones panels and from workflow.

- Added ability to send Email while sending letters, from Communication & Email panels and from workflow.
- Added ability to increment attempts/contacts on phone number/Email in Compliance panel incremented upon SMS/Email delivered successfully depending upon the configuration.
- Added ability to set the Phone number/Email as bad upon SMS/Email delivery failure depending upon the configuration
- Inbound SMS/Email is fetched and displayed in Communication panel
- Attachments from inbound emails are saved and displayed in the Communication panel.
- Added ability to handle any opt-out from receiving SMS/Email and unsubscribe the respective debtor from further SMS/Email communication respectively
- New events are added to events panel at appropriate operations while sending, reading, delivery status, etc. for SMS & Email

Letters

- Added an ability to change the number of days prior to the due date of the payment for the Promise Letter to be sent

Search

- Added missing search fields to the Default Quick Search options in Agent Desktop.

Login

- Provided an option to connect to different databases from Web UI

Payment Arrangements & Wallet

- New events are added to events panel at appropriate operations while sending, reading, delivery status, etc. for SMS & Email
- Payment Vendor Plugins can be configured in Client scope as well.
- User can calculate and update the interest deferral if the interest deferral flag in master is set to true.
- Surcharge Type Policy has been created under Financial in Administration. It allows adding, updating, and deleting new surcharge types. And these surcharge types are displayed in a drop-down for surcharge calculation in the arrangements.
- A new table bin_list is created and contains the BIN numbers used to compare with the card number that is being entered while saving into the wallet and the type to compare with the card type of the item being added
- Added an option to edit the address for an existing wallet item
- Surcharge for payment methods is set as surcharge percentage, which takes the same flat amount as a percentage. If the Surcharge Percent checkbox is checked. The surcharge will be considered as a percent and will be shown as % in the arrangement Window

- Added a new option to view Business Rules while setting up an arrangement. Users can view the Business Rules in the arrangement panel to view a summary of payment arrangement permissions set for their user role and the customer on the account.
- Provided an ability to establish different business rules when setting up an arrangement based upon the payment method being used (Card, ACH, Promise)
- Added request-specific SIF or PIF Letter be generated when setting up a payment arrangement
- Added a posting note within the Arrangements task.

Latitude Console

Latitude Console 2020 R1 includes the following new features.

CBR Special Comment tool

Added the CBR Special Comment tool to allow users to update the special comment on specific CBR accounts.

Latitude Installation and Configuration

Latitude Console 2020 R1 includes the following new features:

- Added configuration instructions for using a proxy server for requests going outside the network.
- Added configuration instructions to allow mapping to customer addresses so that you can import them into Latitude for new business only.
- Removed support for the following Client workstation software:
    - Microsoft Internet Explorer 11
    - Microsoft Office to 2007
    - SAP Crystal Reports 8.5

Letter Console Help

Letter Console Help 2021 R1 includes the following new features.

Itemization Letter Merge Fields

- Added Itemization Letter Merge Fields in Letter Merge Fields section.

Validation Notice Letter Merge Fields

- Added Validation Notice Letter Merge Fields in Letter Merge Fields section.

List Builder

List Builder 2020 R2 includes the following new features.

Export a call list to a Genesys Cloud campaign

Updated the information about create and export a call list to a Genesys Cloud campaign in a wizard form.

- Added contact list management options
- Added campaign management options

List Builder

List Builder 2022 R1 includes the following new features.

List builder - Genesys Cloud integration

- New capabilities added to List Builder while exporting call list to Genesys Cloud.
    - Ability to exit campaign creation form between the process (Ex: after just creating the contact list).
    - Ability to provide instruction to Genesys Cloud to map auto timezone..
    - Ability to pass on desired Callable timeset that user would like to map with the campaign.
- New command line capability added to list builder to execute the data export.
    - This ability in conjunction with Job Manager can be scheduled and automated..
    - This ability can be used in windows task schedulers for an automation..
    - Contact list exporting and campaign building using Genesys Cloud dialer is fully automated.

New Features in 2020 R1

The following products or components include new features in the Latitude 2020 R1 release.

- Account Analysis
- AIM
- AIM Receiver
- Exchange Manager
- Job Manager
- Latitude
- Latitude Console
- Latitude Installation and Configuration
- WorkFlow Designer

New Features in 2020 R2

The following products or components include new features in the Latitude 2020 R2 release.

- Latitude
- List Builder

New Features in 2021 R1

The following products or components include new features in the Latitude 2021 R1 release.

- Account Analysis
- Latitude
- Letter Console Help
- AIM

New Features in 2022 R2

The following products or components include new features in the Latitude 2022 R1 release.

Latitude

New Features in 2023 R1

The following products or components include new features in the Latitude 2023 R1 release.

- Latitude
- Dashboard
- Workflow Designer

New Topic

Type topic text here.

New Features in 2022 R1

The following products or components include new features in the Latitude 2022 R1 release.

- Job Manager
- Exchange Manager
- AIM
- List Builder
- Latitude
- API

Product Notices

Starting with the release on April 30, 2020, Latitude by Genesys changed the release naming convention. Previously, we identified releases by version number plus the Service Update (SU) number. For example, Latitude 12.0 SU12. The new naming convention identifies releases by release year and release cadence. So, the April 30, 2020 release is officially known as Latitude 2020 R1.

WorkFlow Designer

WorkFlow Designer 2020 R1 includes the following new features.

System events

Added the following system events:

- Collateral Auction Appraisal Added
- Collateral Auction Appraisal Updated
- Collateral Auction Bid Added
- Collateral Auction Bid Updated
- Collateral Auction Repair Bid Added
- Collateral Auction Repair Bid Updated
- Collateral Auction Updated
- Collateral Lease Updated
- Collateral Real Estate Updated
- Collateral Repossession Updated
- Collateral Updated
- RDN Case Added
- RDN Case Closed
- RDN Case Closed And Reassigned
- RDN Case Hold Placed
- RDN Case Hold Released
- RDN Case Status Changed
- RDN Case Update Requested
- RDN Case Updated

Workflow Designer

Workflow Designer of 2023 R1 includes the following new features and permissions:

- Added a capability to send an Email Attachment in **Send Correspondence Workflow Action**.

- **Send Correspondence Workflow Action** modified to enable users to attach a standard letter template, or an existing document attached to the account when sending an email.

Product Notices

Starting with the release on April 30, 2020, Latitude by Genesys changed the release naming convention. Previously, we identified releases by version number plus the Service Update (SU) number. For example, Latitude 12.0 SU12. The new naming convention identifies releases by release year and release cadence. So, the April 30, 2020 release is officially known as Latitude 2020 R1.

New Features in 2022 R1

The following products or components include new features in the Latitude 2022 R1 release.

- Job Manager
- Exchange Manager
- AIM
- List Builder
- Latitude
- API

Job Manager

Job Manager 2022 R1 includes the following new features.

Automation

- Using the web API job category in Job Manager, Account Analysis queries can be executed automatically.

Exchange Manager

Exchange Manager 2022 R1 includes the following new features.

Exchange Schema

- Exchange Schema is modified to add Historical Transactions for New Business and Maintenance

AIM

AIM 2022 R1 includes the following new features.

Historic Transactions

- Added new record CHST under CPLC placement file to export Historic Transactions.

List Builder

List Builder 2022 R1 includes the following new features.

List builder - Genesys Cloud integration

- New capabilities added to List Builder while exporting call list to Genesys Cloud.
    - Ability to exit campaign creation form between the process (Ex: after just creating the contact list).
    - Ability to provide instruction to Genesys Cloud to map auto timezone..
    - Ability to pass on desired Callable timeset that user would like to map with the campaign.
- New command line capability added to list builder to execute the data export.
    - This ability in conjunction with Job Manager can be scheduled and automated..
    - This ability can be used in windows task schedulers for an automation..
    - Contact list exporting and campaign building using Genesys Cloud dialer is fully automated.

Latitude

Latitude 2022 R1 includes the following new features and permissions.

Permissions and Policies

- New permissions have been created under Digital Communication > SMS, which is used when sending SMS to debtors
    - Gateway configuration defined at System & Client Scope. The plugin used to send and receive SMS is configured here. Each plugin setting must be separated by a new line. There's also inbuilt support to integrate other vendor plugins. Genesys Cloud SMS plugin is built into the system
    - Allow sending SMS – System, Client, Role & User Scopes. SMS is sent only if this is enabled
    - Consider SMS as Attempt – System level. This is also added as a new option under State Restriction setting. Update State Restriction setting documentation accordingly. Sending an SMS is considered as an attempt and the number of attempts in the Compliance panel are incremented if this is enabled
    - Consider SMS as Contact – System level. This is also added as a new option under State Restriction setting. Update State Restriction setting documentation accordingly. Sending an SMS is considered as a contact and the number of contacts in the Compliance panel are incremented if this is enabled
    - Consider SMS as Worked – System, Client. Sending an SMS is considered as worked if this is enabled
    - Consider SMS as Bad – System, Client. Phone number is updated as Bad on delivery failure if this is enabled.
- New permissions have been created under Digital Communication > Email, which is used when sending emails to debtors
    - Gateway configuration defined at System & Client Scope. Plugin used to send and receive emails is configured here. SMTP, IMAP is the recommended plugin. Each plugin setting must be separated by a new line. There's also inbuilt support to integrate other vendor plugins
    - Allow sending Email – System, Client, Role & User Scopes. Email is sent only if this is enabled
    - Consider Email as Attempt – System level. This is also added as a new option under the State Restriction setting. Update State Restriction setting documentation accordingly. Sending an email is considered as an attempt and the number of attempts in the Compliance panel are incremented if this is enabled
    - Consider Email as Contact – System level. This is also added as a new option under the State Restriction set. Update State Restriction setting documentation accordingly. Sending an email is considered as a contact and the number of contacts in the Compliance panel is incremented if this is enabled

  - Consider Email as Worked – System, Client. Sending an email is considered as worked if this is enabled
  - Consider Email as Bad – System, Client. Email address is updated as Bad on delivery failure if this is enabled
  - Allow Attachments - System level. If allow attachment enabled, must specify file share to house attachments
- Added a new policy under WebAccess → Website User Policy as 'User Can Upload and Download files to the web Server' where users can save upload location and download location for files.
- A new policy named “Restrict Card Payments to Debit Cards Only” is added to restrict card types to only debit type cards at the System/Line of Business/Client scope. The policy would go under the "Credit Card" subtype folder under Scheduled Payments > Business Rules

Reference Panels

- Added a table named dbo.HistoricalTransactions and Reference panel to show the data from dbo.HistoricalTransactions

System codes and settings

- A new letter configuration called Communication Templates has been created to configure if a letter code can be sent as a letter, email, or SMS.
  - A designer to create email/SMS is added for the user to create templates.
  - A list of merge fields is provided to inject any data from Latitude while rendering the templates.
- Added the customer groups under System Codes & Settings in Administration.
  - In the Navigation pane, click System Codes and Settings > Customer Groups > Custom Customer Groups.
  - Use the Custom Customer Groups dialog box to add, modify, and delete Customer Groups.

    Fields and the description of customer group dialogue.

    Name: Custom Customer Group name

    Description:Description of the Custom Customer Group

    Display Group in Invoice application: If selected the Custom Customer Group is added in Invoice application.

    Display Group on Statistics Console: If selected the Custom Customer Group is added on Statistics console.

    Client: Select the clients, which must be part of the current custom-customer group.

Digital Communication (SMS and Email)

- Added ability to send outbound SMS from Communication, phones panels and from workflow.

- Added ability to send Email while sending letters, from Communication & Email panels and from workflow.
- Added ability to increment attempts/contacts on phone number/Email in Compliance panel incremented upon SMS/Email delivered successfully depending upon the configuration.
- Added ability to set the Phone number/Email as bad upon SMS/Email delivery failure depending upon the configuration
- Inbound SMS/Email is fetched and displayed in Communication panel
- Attachments from inbound emails are saved and displayed in the Communication panel.
- Added ability to handle any opt-out from receiving SMS/Email and unsubscribe the respective debtor from further SMS/Email communication respectively
- New events are added to events panel at appropriate operations while sending, reading, delivery status, etc. for SMS & Email

Letters

- Added an ability to change the number of days prior to the due date of the payment for the Promise Letter to be sent

Search

- Added missing search fields to the Default Quick Search options in Agent Desktop.

Login

- Provided an option to connect to different databases from Web UI

Payment Arrangements & Wallet

- New events are added to events panel at appropriate operations while sending, reading, delivery status, etc. for SMS & Email
- Payment Vendor Plugins can be configured in Client scope as well.
- User can calculate and update the interest deferral if the interest deferral flag in master is set to true.
- Surcharge Type Policy has been created under Financial in Administration. It allows adding, updating, and deleting new surcharge types. And these surcharge types are displayed in a drop-down for surcharge calculation in the arrangements.
- A new table bin_list is created and contains the BIN numbers used to compare with the card number that is being entered while saving into the wallet and the type to compare with the card type of the item being added
- Added an option to edit the address for an existing wallet item
- Surcharge for payment methods is set as surcharge percentage, which takes the same flat amount as a percentage. If the Surcharge Percent checkbox is checked. The surcharge will be considered as a percent and will be shown as % in the arrangement Window

- Added a new option to view Business Rules while setting up an arrangement. Users can view the Business Rules in the arrangement panel to view a summary of payment arrangement permissions set for their user role and the customer on the account.
- Provided an ability to establish different business rules when setting up an arrangement based upon the payment method being used (Card, ACH, Promise)
- Added request-specific SIF or PIF Letter be generated when setting up a payment arrangement
- Added a posting note within the Arrangements task.

API

APIs in 2022 R1 includes the following new end points

New API's are developed exposing the following functionality:

- That returns the configuration details stored in Create Scheduled Payments permission.
- To add a series of one or more scheduled payments that will be processed on the portal or in Latitude.
- Process payment via card or ACH in real-time.
- Post a payment against an account where the payment was processed via another platform such as a Self-Service Portal or Client System in a similar manner as if the payment was posted in Latitude.
- To store a previously obtained payment instrument token for Cards in the tokenizer and wallet for future payments.
- Add new Card instruments to the wallet to be used for payments
- Add new banking instruments to the wallet to be used for payments

New Features in 2021 R1

The following products or components include new features in the Latitude 2021 R1 release.

- Account Analysis
- Latitude
- Letter Console Help
- AIM

Account Analysis

The Account Analysis tool for 2021 R1 includes the following new features.

Accounts

Added the following accounts conditions for querying accounts

- Validation Notice
- Itemization Balance
- Call Consent

Phones Master

Added the following phones master conditions for querying accounts

- Consent
- Call Preferences

Email

Added the following email conditions for querying accounts

- Email

AIM

AIM Help 2021 R1 includes the following new features.

Compliance Changes

- Added a new record type to AIM to support the agency reporting the validation notice to the account owner.
- Added new fields to AIM/AIM Receiver to support providing consent for phone and email along with the preferred contact method to and from the agency.
- Modified AIM and AIM Receiver to include itemization data for new business and maintenance.
- Modified AIM to allow passing preferred method of communication and call time preferences/restrictions in new business and maintenance
- Modified AIM Receiver to allow for loading preferred method of communication and call time preferences/restrictions.
- New AIM record types (CEML, AEML) are required to pass the preferred method of communication in addition to email address data.
- Version 10 does not support email types or multiple email addresses. However, liquid supports multiple email addresses.
- In AIM, the type code mentioned as blank and primary marked email are only passed.
- Added Itemization fields in the Demographics Export File Phone Panel Record.
- Added call consent and call preferences fields in the Placement Export File Account Record.

Latitude

Latitude 2021 R1 includes the following new features and permissions.

Permissions

- Added Compliance Settings for the following:
    - Credit Bureau Reporting
    - Validation Notice Tracking.
    - Call Attempts and Conversation Limits
- Added Access Script Builder Permission for specifying whether users can create and update Scripts.

Reference panels

- Added ability to add notes in Events Panel for an account.
- Added ability to view attempts/conversations, validation notice details, itemization details, and preferred time to call details as part of compliance panel.
- Added ability to apply preferences/restrictions to phone numbers.

System Codes and Settings

- Added ability to add, modify, and delete holiday calender.
- Added ability to modify date and phone number using the localization code.

Script Builder

- Added ability to create and modify Script Query.
- Added ability to create, modify, copy, group, delete Script Query Conditions.
- Added ability to create, modify, delete, and view history of Scripts.

Arrangements

- Added ability to prevent adding expired credit card, address validation.

Payments

- Added ability to decline payments for repay, when the information provided is incorrect.

Compliance

- Added ability to validate notice provided to customer/debtor verbally.
- Added ability to view the conversations held.

Warnings

- Added ability to view validation status warnings for an account.

Mail Return

- Added ability to manage mail return.

Letter Console Help

Letter Console Help 2021 R1 includes the following new features.

Itemization Letter Merge Fields

- Added Itemization Letter Merge Fields in Letter Merge Fields section.

Validation Notice Letter Merge Fields

- Added Validation Notice Letter Merge Fields in Letter Merge Fields section.

New Features in 2020 R2

New Features in 2020 R2

The following products or components include new features in the Latitude 2020 R2 release.

- Latitude
- List Builder

Latitude

Latitude 2020 R2 includes the following new features and permissions.

Account Reactivation

Added ability to reinstate an account and unreturn an account.

Reassign an account to desk

Added ability to reassign an account to your own desk under certain conditions.

Set a Timed Reminder

Added ability to set a reminder for an account associated to your desk and have the reminder appear at a specific date and time.

Maintain Account Restrictions

Added ability to set restrictions that indicate an account requires special handling, for account such as attorney, bankruptcy, deceased, or CCCS information.

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 **SMTP Permission** 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**.
- Added ability to **Print a letter**.

List Builder

List Builder 2020 R2 includes the following new features.

Export a call list to a Genesys Cloud campaign

Updated the information about create and export a call list to a Genesys Cloud campaign in a wizard form.

- Added contact list management options
- Added campaign management options

New Features in 2020 R1

New Features in 2020 R1

The following products or components include new features in the Latitude 2020 R1 release.

- Account Analysis
- AIM
- AIM Receiver
- Exchange Manager
- Job Manager
- Latitude
- Latitude Console
- Latitude Installation and Configuration
- WorkFlow Designer

Account Analysis

The Account Analysis tool for 2020 R1 includes the following new features.

Collateral conditions

Added the following collateral conditions for querying accounts based on collateral data or Recovery Database Network (RDN) system data:

- Collateral
- Collateral Auction
- Collateral Auction Appraisal
- Collateral Auction Bid
- Collateral Auction Repair Bid
- Collateral Lease
- Collateral Real Estate
- Collateral Repo Agency
- Collateral Repossession
- Collateral Repo Status
- RDN Master

AIM

AIM 2020 R1 includes the following new features.

Notes

Updated notes export file to include user-generated events that occurred in Latitude after account placement.

- Added user-generated events that occurred in Latitude to the Notes (CNOT) export file. The system doesn't include system-generated notes and events in the export file.
- Added user-generated events that you received from the agencies or attorneys holding the accounts to the Notes (ANOT) import file. The system doesn't include system-generated notes and events in the import file.

Phone consent

- Added phone consent to the Demographics Export File Phone Panel record in the Demographics (CDEM) export file.
- Added phone consent to the Demographics Import File Phone Panel record in the Demographics (ADEM) import file.

AIM Receiver

AIM Receiver 2020 R1 includes the following new features.

Phone consent

- Added phone consent to the Demographics (CDEM) import file.
- Added phone consent to the Demographics (ADEM) export file.

Exchange Manager

Exchange Manager 2020 R1 includes the following new features.

Import and export

Added the following tables to Exchange manager to allow importing collateral data from, and exporting collateral data to the Recovery Database Network (RDN) system.

- Collateral Table
- Collateral Auction Table
- Collateral Auction Appraisal Table
- Collateral Auction Bid Table
- Collateral Auction Repair Bid Table
- Collateral Lease Table
- Collateral Real Estate Table
- Collateral Repossession Table
- RDN Master Table

Job Manager

Job Manager 2020 R1 includes the following new features.

Job categories

Added the **Web API Job** category to allow updates to Recovery Database Network (RDN) cases.

Latitude

Latitude 2020 R1 includes the following new features and permissions.

Permissions

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

PureCloud 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.

Reference panels

Added a **Collateral** panel for maintaining automotive and non-automotive collateral information for an account.

System codes and settings

- Added **Third Party Credentials** to the **User** dialog box to allow Latitude to log on users to a third-party system automatically.
- Added user-defined list codes to the **List Data** panel for the following:
    - Bankruptcy Reaffirm Method
    - Bankruptcy Status
    - Bankruptcy Surrender Method
    - Prefix
    - Suffix

Task panels

Added the **RDN Integration** panel to create and update vehicle recovery cases for the account. This panel integrates with the Recovery Database Network (RDN) system to allow the exchange of recovery data.

Latitude Console

Latitude Console 2020 R1 includes the following new features.

CBR Special Comment tool

Added the CBR Special Comment tool to allow users to update the special comment on specific CBR accounts.

Latitude Installation and Configuration

Latitude Console 2020 R1 includes the following new features:

- Added configuration instructions for using a proxy server for requests going outside the network.
- Added configuration instructions to allow mapping to customer addresses so that you can import them into Latitude for new business only.
- Removed support for the following Client workstation software:
    - Microsoft Internet Explorer 11
    - Microsoft Office to 2007
    - SAP Crystal Reports 8.5

WorkFlow Designer

WorkFlow Designer 2020 R1 includes the following new features.

System events

Added the following system events:

- Collateral Auction Appraisal Added
- Collateral Auction Appraisal Updated
- Collateral Auction Bid Added
- Collateral Auction Bid Updated
- Collateral Auction Repair Bid Added
- Collateral Auction Repair Bid Updated
- Collateral Auction Updated
- Collateral Lease Updated

- Collateral Real Estate Updated
- Collateral Repossession Updated
- Collateral Updated
- RDN Case Added
- RDN Case Closed
- RDN Case Closed And Reassigned
- RDN Case Hold Placed
- RDN Case Hold Released
- RDN Case Status Changed
- RDN Case Update Requested
- RDN Case Updated