



## Latitude<sup>®</sup> Release Notes

Version 12.0

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### **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/liquid12/desktop/Copyright\\_and\\_Trademark\\_Information.htm](https://help.genesys.com/latitude/liquid12/desktop/Copyright_and_Trademark_Information.htm).

## Table of Contents

Introduction to Release Notes .....	8
New Features in 12.0 SU 12 .....	8
Account Analysis Conditions .....	8
AIM .....	8
Complaints .....	9
Disputes .....	9
AIM Receiver Manager .....	9
Complaints .....	9
Disputes .....	10
Exchange .....	10
Export .....	10
Import .....	10
Invoices .....	10
Latitude .....	10
Anchor cards .....	10
Attorneys .....	10
Complaints .....	10
Email addresses .....	11
Events .....	11
Interactions .....	11
Payment arrangements .....	11
Permissions .....	11
Phones .....	12
Sole responsibility .....	12
Support Queue .....	12
Letter Console .....	12
Link Console .....	13
Web Access .....	13
New Features in 12.0 SU 11 .....	13
Credit Bureau Reporting Wizard .....	13

Exchange ..... 13

Latitude ..... 14

    Addresses ..... 14

    Credit bureau reporting ..... 14

    Insurance ..... 14

    Links ..... 14

    Medical accounts ..... 14

    Payments ..... 14

    Permissions ..... 14

New Features in 12.0 SU 10 ..... 15

    Account Analysis Conditions ..... 15

    Credit Bureau Reporting Console ..... 15

    Latitude ..... 15

        Joined accounts ..... 15

        Linked accounts ..... 15

        Payments ..... 16

        Permissions ..... 16

        System codes ..... 16

    Latitude Console ..... 16

    Letter Console ..... 16

    System Requirements ..... 16

New Features in 12.0 SU 9 ..... 17

    AIM ..... 17

    Custodian ..... 17

    Installation and Configuration ..... 17

    Latitude ..... 17

        Credit bureau reporting ..... 17

        Legal cases ..... 17

        Payments ..... 18

        Permissions ..... 18

        System codes ..... 18

New Features in 12.0 SU 8 ..... 18

Latitude Release Notes

- Credit Bureau Reporting Console ..... 18
- Latitude ..... 18
  - Joined accounts..... 18
  - Judgments ..... 19
  - Permissions ..... 19
  - System codes ..... 19
- Latitude Console ..... 19
- New Features in 12.0 SU 7 ..... 19
  - Credit Bureau Reporting Console ..... 19
    - Customer configuration ..... 20
    - Setup configuration..... 20
    - Status configuration..... 20
  - Credit Bureau Reporting Wizard..... 20
- Custodian ..... 20
- Latitude ..... 20
  - Direct debit ..... 21
  - Custom Reference panel..... 21
  - Letter history..... 21
  - Permissions ..... 21
  - System codes ..... 21
- New Features in 12.0 SU 6 ..... 21
  - Installation and Configuration ..... 21
- Latitude ..... 21
  - Accounts..... 21
  - Employment..... 22
  - Notes..... 22
  - Open interactions ..... 22
  - Payment arrangements..... 22
- New Features in 12.0 SU 5 ..... 22
  - Installation and Configuration ..... 22
- Latitude ..... 22
  - Medical..... 22

Payment batch processing ..... 23

Permission ..... 23

Support queue ..... 23

Invoices ..... 23

New Features in 12.0 SU 4 ..... 23

    Installation and Configuration ..... 23

    Latitude ..... 23

        Account search..... 23

        Credit bureau reporting ..... 24

        Direct debits..... 24

        Letters ..... 24

        Payment arrangements..... 24

        Permissions ..... 24

        System codes ..... 24

    Letter Console ..... 25

    System Requirements ..... 25

    WorkFlow Designer..... 25

New Features in 12.0 SU 3 ..... 26

    AIM..... 26

    Custodian ..... 26

    Dialer API..... 26

    Installation and Configuration ..... 26

    Latitude ..... 27

        Account balance..... 27

        Account search..... 27

        Addresses ..... 27

        Care and financial hardship ..... 27

        Complaints ..... 27

        Contact information..... 27

        Credit Bureau reporting ..... 27

        Disputes ..... 28

        Email addresses..... 28

Latitude Release Notes

- Income and expenditures ..... 28
- Joined accounts..... 28
- Letters ..... 28
- Linked accounts..... 28
- Payment arrangements..... 28
- Permissions ..... 28
- Phones..... 29
- Sole responsibility ..... 29
- System codes ..... 29
- Latitude Console ..... 30
- System Requirements ..... 30
- Web Access ..... 30
- New Features in 12.0 SU 2 ..... 31
  - AIM..... 31
  - AIM Receiver Manager ..... 31
  - Installation and Configuration ..... 31
- Latitude ..... 32
  - Account links ..... 32
  - AIM work efforts ..... 32
  - Anchor cards ..... 32
  - Call validation..... 32
  - Client guidelines..... 32
  - Collection holds..... 32
  - Manage interest..... 32
  - Parties ..... 32
  - Payment arrangements..... 32
  - Permissions ..... 32
  - System codes ..... 33
- Web Access ..... 33
- New Features in 12.0 SU 1 ..... 33
  - Latitude ..... 33
    - Account labels..... 33

- Account processes and stages ..... 34
- Hot notes..... 34
- Legal case ..... 34
- Letters ..... 34
- Linked accounts..... 34
- Open interactions ..... 34
- Payments..... 34
- Reference panels..... 34
- Timed reminders..... 35
- Latitude Console ..... 35
  - Custom queue ..... 35
  - Fee schedules ..... 35
  - Payments..... 35
- System Requirements ..... 35

## Introduction to Release Notes

The Release Notes include all new features and visible changes introduced in each Service Update (SU) of Latitude 12.0 and its related products and components. For a PDF version of the Release Notes, see the Product Information site at <https://my.inin.com/products/Collector/Pages/Documentation.aspx>.

Each SU includes a system-generated Readme and Summary file that provides a detailed list of public changes in the release. These files are available on the Product Information at <https://my.inin.com/products/Collector/Pages/Service-Updates.aspx>.

**Note:** To access the Product Information site, you must have the appropriate logon credentials. For more information, contact Latitude by Genesys Support.

### [Copyright and Trademark Information](#)

## New Features in 12.0 SU 12

The following products or components include new features in 12.0 SU 12:

- [Account Analysis Conditions](#)
- [AIM](#)
- [AIM Receiver Manager](#)
- [Exchange](#)
- [Invoices](#)
- [Latitude](#)
- [Letter Console](#)
- [Link Console](#)
- [Web Access](#)

## Account Analysis Conditions

The Account Analysis query tool in Latitude 12.0 SU 12 includes the following new conditions for querying accounts:

- Added "Events" condition to allow querying accounts based on event criteria, such as event date and event type.
- Added "Interactions" condition to allow querying accounts based on interactions criteria, such as method and queue.

## AIM

AIM 12.0 SU 12 includes the following new features for complaints and disputes.



## Complaints

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

## Disputes

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

## AIM Receiver Manager

AIM Receiver Manager 12.0 SU 12 includes the following new features.

### Complaints

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

## Disputes

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

## Exchange

Exchange 12.0 SU 12 includes the following new features and changes.

Changed the navigation pane to display small icons instead of buttons for **Forms**, **Services**, and **Vendors** options.

## Export

- Added ability to export previous versions of clients configurations on the **Interface Notes** tab.
- Added ability to select multiple rows and move a group of rows up or down 10 rows at a time in the **Generate Report Record** window.

## Import

- Removed the **Uses XML** check box from the **New Business** and **Financial Transactions** tabs on the **Import Files** tab.
- Removed ability to import an XML file type from the **General Properties** dialog box.
- Added ability to import clients and files from the command line using the "ExchangeManagerCLI.exe" file in the bin folder.

## Invoices

Invoices 12.0 SU 12 added preview, export and print invoice options to the **Invoice Options** dialog box for a specific or group of customers.

## Latitude

Latitude 12.0 SU 12 includes the following new features and permissions.

### Anchor cards

- Added **Account Summary** card for displaying account information.
- Updated the **Party Navigator** card to include information specific to the primary responsible party on an account, and other parties on the account.

### Attorneys

Added ability to remove an attorney from an account on the **Attorney** tab on the **Customer** panel.

### Complaints

Added ability to associate one or more linked accounts to a complaint on the **Complaints** panel.

## Email addresses

Moved the functionality for modifying permission to send email messages to the **Add Email Address** and **Edit Email Address** dialog boxes and removed the **Change Email Usage Consent** dialog box.

## Events

Added the following to the **Events** panel.

- Ability to filter events by a specific event type.
- Ability to sort events by date.
- Ability to display notes for linked accounts.

## Interactions

- Added ability to filter interactions by a specific date or date range on the **Interactions** panel.
- Added ability to clear all filters on the **Interactions** panel.
- Changed **Interactions** panel to display interactions in a data grid.
- Added account number to the detail view on the **Interactions** panel.
- Added ability to have the system close interactions 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.

**Note:** This feature requires the **Auto Close Account** permission.

## Payment arrangements

Added ability to create a single payment arrangement for an amount that exceeds the account balance when proposing a payment arrangement in the **Payment Negotiator** card. You can create the arrangement for a single, non-joined account or for one or more joined accounts. The amount cannot exceed the maximum overpayment amount configured in the **Allow Overpayments** permission.

## Permissions

- Added **Allow Overpayments** permission for specifying whether to allow payment arrangements that exceed the account balance. If allowing overpayments, specify the 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%, you cannot create an overpayment arrangement for more than \$110.

- Added **Auto Close Account** permission for specifying whether users can have the system close an interaction automatically.
- Added **Merge Using Microsoft Word** permission for specifying whether users can modify letter templates in Letter Console using Microsoft Word. You must have Microsoft Word installed to use this feature.
- Added **Time on Account Configuration** permission for specifying 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. A yellow background indicates that the user reached the threshold set for the **caution** zone. A red background indicates that the user reached the threshold set for the **warning** zone.

### Phones

- Added ability to dial an account phone number on the **Contact Information** tab or the **Phones** panel.
- Moved the functionality for modifying permission to call, auto-dial, text, or fax a phone number to the **Add Phone Number** and **Edit Phone Number** dialog boxes and removed the **Change Phone Usage Consent** dialog box.

### Sole responsibility

- Removed **Request Sole Responsibility** option from Account Navigator card for requesting sole responsibility for a party on an account.
- Removed **Approve/Deny Sole Responsibility** option from Account Navigator card for approving or denying requests for sole responsibility for a party on an account.

### Support Queue

Added **Remove From Queue** option to the **Support Queue Details** card to allow users to remove the account that is open in the **Work Form** from a support queue.

### Letter Console

Letter Console 12.0 SU 12 includes the following changes:

- Renamed the **Download for Editing** button to **Download** on the **Letter Pool** tab.
- Renamed the **Upload Edited Template** button to **Upload** on the **Letter Pool** tab.
- When downloading or uploading letters, the file type defaults to ".doc" and both default to the same folder.
- Added letter code to the default file names for downloaded letters. Previously, the default file name only included the letter ID.
- Added an **Edit** button to the **Letter Pool** tab. This button is only available if your organization enabled the **Merge Using Microsoft Word** permission in Latitude. Latitude by Genesys added this button to restore the ability to open letter templates directly in Microsoft Word without

having to use the download and upload feature. For more information about the new permission, see the *Latitude* documentation.

- When clicking the **Download Merge Fields** button on the **Letter Pool** tab, the output file name defaults to "MergeFields.[Letter Console Version].doc".

### Link Console

Link Console 12.0 SU 12 includes merging of the following data when Link Console links accounts for the same party:

- Address records.
- Email address records.
- Care and financial hardship records.
- Income and expenditure records.
- Complaint records.

### Web Access

Web Access 12.0 SU 12 includes an Agency Details section on the **Account** page for accounts placed with an outside collection agency or attorney.

### New Features in 12.0 SU 11

The following products or components include new features in 12.0 SU 11:

- [Credit Bureau Reporting Wizard](#)
- [Exchange](#)
- [Latitude](#)

### Credit Bureau Reporting Wizard

Credit Bureau Reporting Wizard 12.0 SU 11 includes the following new exceptions for reporting accounts to the credit bureaus:

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

### Exchange

Exchange 12.0 SU 11 includes the ability to import an insurance category using the new **Category** field in the **Insurance** table.

## Latitude

Latitude 12.0 SU 11 includes new features for addresses, credit bureau reporting, insurance, linked accounts, medical accounts, payments, permissions, and system codes.

### Addresses

Added functionality for updating a person's address on all the person's accounts when modifying the address on one of the person's accounts in the **Edit Address** dialog box.

### Credit bureau reporting

- Added ability to view the credit bureau reporting audit trail on the **Audit** tab in the **CB Reporting** panel.
- Added ability to undo credit reporting delete requests on the **Summary** tab in the **CB Reporting** panel.
- Added ability to delete a medical account from credit reporting on the **Summary** tab in the **CB Reporting** panel because insurance is paying or paid in full.
- Added ability to manage miscellaneous credit bureau reporting settings, such as personal receivership and withdrawn bankruptcy, on the **Utility** tab in the **CB Reporting** panel.

### Insurance

Added ability to specify an insurance category (such as primary or secondary) when adding or modifying an insurance policy on the **Insurance** tab in the **Medical** panel.

### Links

- Added ability to merge certain data when creating a party to add to a link group in the **Manage Links** dialog box.
- Added ability to copy certain data from a person's account to a new customer record when removing the person from a link group in the **Manage Links** dialog box.

### Medical accounts

Added **Medical Account Details** card for viewing medical accounts associated to the responsible parties on an account.

### Payments

- Added ability to specify the total payment amount or allow the system to calculate the amount when proposing a payment arrangement in the **Payment Negotiator** card; or when modifying or rescheduling a payment arrangement in the **Scheduled Payments** card.
- Removed ability to schedule and process a single payment for an account.

### Permissions

- Added **Allow Delete Options** permission for allowing users to delete an account from credit reporting.

- Added **Allow Prevent Flag and Undo Delete** permission for clearing the flag that prevents a never-reported account from reporting and restoring credit reporting for accounts reported previously and then deleted.
- Added **Utility Tab** permission for viewing the **Utility** tab for credit bureau reporting.

## New Features in 12.0 SU 10

The following products or components include new features in 12.0 SU 10:

- [Account Analysis Conditions](#)
- [Credit Bureau Reporting Console](#)
- [Latitude](#)
- [Latitude Console](#)
- [Letter Console](#)
- [System Requirements](#)

## Account Analysis Conditions

The Account Analysis query tool in Latitude 12.0 SU 10 includes the following new conditions for querying accounts:

- Added "Scheduled Payment Detail" condition to allow querying accounts based on scheduled payment detail criteria. This condition is useful when you want to view all payment arrangements regardless of whether an account is part of a linked group.
- Added "cbrDataPaidByInsurance" condition to allow querying medical accounts that insurance paid.
- Added "cbrDataPendingExceptionDtlv" condition to allow querying accounts based on credit reporting exceptions.

## Credit Bureau Reporting Console

Credit Bureau Reporting Console 12.0 SU 10 includes a change to the optional credit bureau reporting compliance condition code "XB" from one-time reporting to reporting for as long as the code is valid.

## Latitude

Latitude 12.0 SU 10 includes new features for joined accounts, linked accounts, payments, permissions, and system codes.

### Joined accounts

Added pagination and changed some labels on the **Joined Accounts** card.

### Linked accounts

- Added Refresh icon to the **Link Details** panel to allow users to retrieve current data when viewing linked accounts.

- Added **Link Summary** card for viewing summary information for linked accounts.

### Payments

- Added Refresh icon to the **Arrangements** panel to allow users to retrieve the current list of joined accounts when working with payment arrangements.
- Added **Agent/Collector Information** page for viewing applied and planned payments.

### Permissions

- Added **Allow Creation of Holds** permission for specifying whether users can create and remove account-level and customer-level collection holds.
- Added **Allow Manual Linking/Unlinking** permission for specifying whether users can link and unlink accounts manually.
- Added **Allow Start/Stop Interest** permission for specifying whether users can start and stop interest on accounts.
- Removed **Allowed Letters** permission for specifying which letters are available to users. All letters are now available.
- Added **Enable Server Caching of Permissions** permission for turning on or off permission caching.
- Added **View Other User Payments** permission for specifying whether users can view payments that other users processed.

### System codes

Removed options for configuring credit bureau reporting from Status codes. The configuration options are now available in Credit Bureau Reporting Console.

### Latitude Console

Latitude Console 12.0 SU 10 includes the following new features:

- Added a warning message when creating a payment for an account that has a pending payment in an existing payment batch.
- Added the **Require the user to set a follow-up date on accounts worked in the custom queue check** box to the **Build Custom Queue** window to indicate whether to require follow-up on accounts in the custom queue.

### Letter Console

Letter Console 12.0 SU 10 includes the ability to download letter templates in ".docx" format on the **Letter Pool** tab.

### System Requirements

System requirements for Latitude 12.0 SU 10 include support for SQL Server 2014 R2.



## New Features in 12.0 SU 9

The following products or components include new features in 12.0 SU 9:

- [AIM](#)
- [Custodian](#)
- [Installation and Configuration](#)
- [Latitude](#)

### AIM

AIM 12.0 SU 9 includes the following new features for You've Got Claims (YGC):

- Changed **BANK\_ACCT** (bank account) field length to 34 in the YGC Export Record Type 05 - Assets export file layout.
- Changed **BANK\_ACCT** (bank account) field length to 34 in the YGC Import Record Type 35 - Bank Assets import file layout.

### Custodian

Custodian 12.0 SU 9 includes the following new tasks:

- Added "Calculate Interest" task, which calculates interest accrued on accounts.
- Added "Cancel Arrangements on Closed Accounts" task, which cancels arrangements when all accounts in the arrangement are closed.

### Installation and Configuration

Installation and configuration for Latitude 12.0 SU 9 includes the ability to configure Exchange to allow mapping to customer addresses and importing them into Latitude for new business only.

### Latitude

Latitude 12.0 SU 9 includes new features for credit bureau reporting, legal cases, payments, permissions, and system codes.

#### Credit bureau reporting

Removed **Type** from the Exceptions data grid in the **CB Reporting** panel.

#### Legal cases

- Removed accrued interest from the **Judgment** tab in the **Legal** panel.
- Added ability to update interest on accounts in judgment on the **Judgment** tab in the **Legal** panel.
- Added ability to delete a legal case from the **General** tab in the **Legal** panel.

## Latitude Release Notes

- Added requirement to link all accounts involved in the legal case and unlink all accounts not involved before creating a legal case. Otherwise, you have to delete the legal case, link and unlink the correct accounts, and recreate the legal case.
- Removed ability to add or remove links when an account in a link group has a legal case.

### Payments

- Removed ability to propose payment arrangements on closed accounts.
- Removed ability to process payments for closed accounts.
- Added **Override Payment Spread** dialog box for overriding a configured payment spread.
- Removed inclusion of closed accounts in linked account payment spreads when processing a payment or payment batch.

### Permissions

- Added **Delete Legal Case** permission for deleting legal cases.
- Added **Override Payment Spread** permission for overriding the configured payment spread for a linked account arrangement.
- Added **Update Interest** permission for updating interest on linked accounts in a judgment.

### System codes

Removed **Current Balance** option from the **Collection Mode** on the **General** tab in the **Client** dialog box.

### New Features in 12.0 SU 8

The following products or components include new features in 12.0 SU 8:

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

### Credit Bureau Reporting Console

Credit Bureau Reporting Console 12.0 SU 8 includes an update to the **Minimum Balance** definition in the **Customer Configuration** pane to indicate that the amount the system compares the threshold to is based on whether the **Report principal only** check box is selected.

### Latitude

Latitude 12.0 SU 8 includes new features for joined accounts, judgments, permissions, and system codes.

### Joined accounts

Added **Responsible Party Balance** and **Past Due** to the **Joined Accounts** card for delinquency accounts.

## Judgments

- Added ability to specify judgment award amounts on the **Judgment** tab in the **Legal** panel.
- Added ability to spread judgment award amounts in the **Judgment Spread Calculator** dialog box.
- Added ability to award a judgment on the **Judgment** tab in the **Legal** panel.
- Added ability to reverse a judgment on the **Judgment** tab in the **Legal** panel.

## Permissions

- Added **Award/Reverse Judgment** permission for specifying whether user can award and reverse judgments.
- Added **Create Scheduled Payments** permission for specifying available payment frequencies for scheduled payments and whether to allow settlements on accounts.
- Added **Deactivate Automatic Status and Queue Level** permission for deactivating automatic account status and queue level changes for arrangements.
- Added **Judgment Award Bucket Mappings** permission for specifying the default mappings from the judgment award amounts to the money buckets in Latitude.
- Added "Spread payments in order of the Fee Schedule Bucket priority and then in the specified order" to the Payment Spread Method policy in the **Payment Spread** permission.

## System codes

- Added **Current Gross** option to the **Collection Mode** on the **General** tab in the **Client** dialog box for calculating the collection cost on the current gross account balance.
- Removed the duplicate permissions from the **System Codes and Settings > General Settings** folder and kept them in their proper "permissions" folders.

## Latitude Console

Latitude Console 12.0 SU 8 includes removal of the options to configure credit bureau reporting. Configuration options are now in Credit Bureau Reporting Console.

## New Features in 12.0 SU 7

The following products or components include new features in 12.0 SU 7:

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

## Credit Bureau Reporting Console

Credit Bureau Reporting Console 12.0 SU 7 includes new configuration settings.

### Customer configuration

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

### Setup configuration

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

### Status configuration

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

### Credit Bureau Reporting Wizard

Credit Bureau Reporting Wizard 12.0 SU 7 includes the following new features:

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

### Custodian

Custodian 12.0 SU 7 includes the following new tasks:

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

### Latitude

Latitude 12.0 SU 7 includes new features for direct debit, custom reference panels, letter history, permissions, and system codes.

### Direct debit

Added ability to view direct debit guarantee when adding a direct debit account on the **Direct Debit** tab in the **Payment Instrument** dialog box.

### Custom Reference panel

Added ability to create custom reference panels using stored procedures and allow the system to display the panels in the **Work Form**.

### Letter history

Added the **Details View** dialog box for viewing pending or historical letters for an account.

### Permissions

- Removed **Delete/OnHold Request** permission and created separate permissions for the delete and on hold request functionality.
- Added **Delete Request** permission for specifying whether users can delete pending letter requests and system-generated letter requests.
- Added **OnHold Request** permission for specifying whether users can place pending letter requests on hold.

### System codes

- Added ability to save an age-based or balance-based fee schedule without selecting a bucket for invoicing in the **Fee Schedule** dialog box.
- Added **Separate Direct** as an invoice type on the **Invoice** tab in the **Client** dialog box.

## New Features in 12.0 SU 6

The following products or components include new features in 12.0 SU 6:

- [Installation and Configuration](#)
- [Latitude](#)

### Installation and Configuration

Installation and configuration for Latitude 12.0 SU 6 includes a requirement to generate a machine key for federated authentication and web server farms. The machine key synchronizes the servers so that all servers can use the authentication token server one issues.

### Latitude

Latitude 12.0 SU 6 includes new features for accounts, surcharges, employment, notes, open interactions, and payment arrangements.

### Accounts

- Changed the tabs on the **Account Navigator** card to a drop-down list.

## Latitude Release Notes

- Added the **Select Accounts** dialog box for selecting multiple linked accounts for which to change the account status.

### Employment

Added **Verified** check box to the **Employer** tab in the **Customer** panel to indicate whether a user verified a person's employment information.

### Notes

Added ability to filter notes by user, system, or both in the **Notes** panel.

### Open interactions

Added ability to close all open interactions in the **Open Interactions** panel.

### Payment arrangements

Added **Arrangement History** panel for viewing payment arrangement history.

### System codes

Added **Maximum Surcharge** to the **Fees** tab in the **Client** dialog box for specifying the maximum surcharge amount on payments received.

## New Features in 12.0 SU 5

The following products or components include new features in 12.0 SU 5:

- [Installation and Configuration](#)
- [Latitude](#)
- [Invoices](#)

### Installation and Configuration

Installation and configuration for Latitude 12.0 SU 5 includes the following new browser version requirement for workstations:

- Microsoft Internet Explorer version 11.
- Google Chrome version 51.
- Mozilla Firefox version 47

### Latitude

Latitude 12.0 SU 5 includes new features for medical accounts, payment batch processing, support queue, and permissions.

### Medical

- Added **Medical** Panel for adding and modifying medical information.
- Added **Insurance tab** to **Medical** panel for flagging an insurance policy as invalid.

### Payment batch processing

- Added **Batch Details** section to the **Batch Processing** page for displaying details of payment processing results.
- Added ability to view payment batch history to the **Batch Processing** page.

### Permission

Added **Configuration for Handling Broken Promises** permission for specifying the status and queue level to assign to accounts with broken promises.

### Support queue

Added **Support Queue Details** card for viewing details for an account that is in a support queue.

### Invoices

Invoices 12.0 SU 5 includes the ability to apply payments to the oldest accounts receivable balance first using the new **Apply to Oldest First** check box in the **Options** dialog box.

### New Features in 12.0 SU 4

The following products or components include new features in 12.0 SU 4:

- [Installation and Configuration](#)
- [Latitude](#)
- [Letter Console](#)
- [System Requirements](#)
- [WorkFlow Designer](#)

### Installation and Configuration

Installation and configuration for Latitude 12.0 SU 4 includes the following new features:

- Added ability to configure FTP and SFTP settings in AIM.
- Added ability to configure SMTP and SFTP settings in Letter Writer.
- Added ability to replace SSN values with blank values so that the SSNs aren't visible in letters.

### Latitude

Latitude 12.0 SU 4 includes new features for several new account-related features, permissions, and system codes.

### Account search

Added **International Phone Number** search criteria to the **Simple** tab in the **Search Accounts** panel and to the quick search feature.

### Credit bureau reporting

Added **Evaluate Account** option on the **Summary** tab of the **CB Reporting** panel to evaluate an account for reporting to the credit bureaus.

### Direct debits

Added **Direct Debit** tab in the **Payment Instrument** dialog box for adding a direct debit account when proposing payment arrangements.

### Letters

Added the **Select Accounts** dialog box for selecting multiple linked accounts for which to request a letter.

### Payment arrangements

- Added **Surcharge Amount**, **Surcharge Total**, and **Gross Total** to the **Payment Negotiator** card.
- Added **Total Surcharges** and **Surcharge** to the **Scheduled Payments** card.

### Permissions

- Added **Allow Manual Evaluation** permission for evaluating accounts manually for credit bureau reporting purposes.
- Added **Create Extra Data** permission for specifying whether users can add custom data.
- Added **Direct Debit** permission for specifying the threshold for scheduling first and subsequent Direct Debit payments.
- Added **Direct Debit Client Representation Rules** permission for configuring payment representation rules.
- Added **Linked Letters** permission for selecting linked accounts to include in letters that can include linked accounts.
- Added **Intl Phone** (International Phone) to the available search options in the **Search** permission.
- Added **Update Extra Data** permission for specifying whether users can modify custom data.
- Removed Surcharge Percent policy from the **User Policy** permission for scheduled payments.
- Added "Allow user to suppress surcharge assessment on new arrangements" policy to the **User Policy** permission for scheduled payments.

### System codes

- Removed ability to modify or delete client comments from the **Comments** tab in the **Client** dialog box.
- Removed **Surcharge %** and **Calc Surcharge From Gross** from the **Payment Method** dialog box.
- Removed Surcharge Type system code.



- Removed **Next Payment Batch** from the **Settings** tab on the **System Configuration** panel.

## Letter Console

Letter Console 12.0 SU 4 includes the following new features:

- Added **Allow letter when account on hold** check box to the **Letter Pool** tab to allow sending letters for accounts that are on hold.
- Added merge fields to allow inserting payment arrangement data into letter templates.
- Added merge fields to allow inserting charge-off data into letter templates.

## System Requirements

System requirements for Latitude 12.0 SU 4 include the following new web browser software requirements:

- Changed Microsoft Internet Explorer version 11 or later to just version 11.
- Changed Google Chrome version 28 or later to version 51.
- Changed Mozilla Firefox version 22 or later to version 47.
- Changed the minimum web browser software requirement from Microsoft Internet Explorer version 9 or later to version 11 or later.

## Workflow Designer

Workflow Designer 12.0 SU 4 includes the following new system events:

- Added "Address Confirmed" system event, which triggers when a user flags an address as confirmed.
- Added "Address Updated" system event, which triggers when a user updates an address.
- Added "AIM Final Recall" system event, which triggers when a user or the system issues a final recall of an account that a user placed with an outside collection agency or attorney.
- Added "AIM Placement" system event, which triggers when a user places an account with an outside collection agency or attorney.
- Added "Care Closed" system event, which triggers when a user changes the status of a care record to "closed."
- Added "Care Confirmed" system event, which triggers when a user flags a care record as confirmed.
- Added "Care Created" system event, which triggers when a user adds a care record to an account.
- Added "Care Unconfirmed" system event, which triggers for accounts that a user hasn't confirmed the care record, or a user removed the care confirmed flag.
- Added "Care Updated" system event, which triggers when a user updates a care record.

## New Features in 12.0 SU 3

The following products or components include new features in 12.0 SU 3:

- [AIM](#)
- [Custodian](#)
- [Dialer API](#)
- [Installation and Configuration](#)
- [Latitude](#)
- [Latitude Console](#)
- [System Requirements](#)
- [Web Access](#)

### AIM

AIM 12.0 SU 3 added the ability to configure batch processing of payment transactions to improve performance using the **Use Payment Batching (helps performance)** check box and **Batch Size** on the **General** tab in the **Agencies/Attorneys** pane.

### Custodian

Custodian 12.0 SU 3 includes the new "SoleResponsibilityTask" task type. This task type retracts active sole responsibility requests that are either pending approval or in an approved state for accounts that no longer have a valid PIF or SIF arrangement.

### Dialer API

Dialer API 12.0 SU 3 includes the following new features:

- Added "SuppressDNC" parameter to the "CallDisposition()" method. This parameter indicates whether to suppress "do-not-call" actions for accounts.
- Added "Callkey" parameter to the "CallReceived()" method. This parameter is for the unique key value for a call.
- Added "CustomLatitudeFunction()" method, which requests custom or ad hoc commands or messages from Latitude. It's used for any message for a particular dialer; and for Interaction Dialer, it's used to retrieve recording lists.
- Added "MaskRecording()" event, which triggers when Latitude enters a state where a recording needs to pause.
- Added "CustomDialerFunction()" event, which triggers in response to a request to list recordings.

### Installation and Configuration

Installation and configuration for Latitude 12.0 SU 3 includes the following new features:

- Added ability to configure AIM Receiver Manager to allow batch processing of financial transactions to improve performance.
- Added SSIS requirement for Letter Console to run the SSIS package that exports letters for vendor printing.
- Added ability to configure AIM to allow batch processing of financial transactions to improve performance.
- Changed the workstation browser requirement from Internet Explorer version 9 or later to Internet Explorer version 11 or later.

## Latitude

Latitude 12.0 SU 3 includes several new account-related features, permissions, and system codes.

### Account balance

Added **Linked Accounts** check box to the **History Balance** panel for including or excluding the display of linked accounts when viewing account balance details.

### Account search

- Added **Bankruptcy**, **Court Case**, and **Garnishment Case Number** search criteria to the **Simple** tab in the **Search Accounts** panel.
- Added ability to locate an account using a search code (for example, "F" for file number). You can type a search code in the **Search** box or select it from a list box in the Account toolbar.

### Addresses

Added **Address** panel for maintaining mailing addresses on accounts.

### Care and financial hardship

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

### Complaints

Added **Complaints** panel for maintaining complaints for accounts. Collection activity is suspended while an account has an open complaint.

### Contact information

Removed ability to add or modify mailing and email addresses associated to accounts on the **Contact Information** tab. You can still add or modify the information on the **Addresses** panel.

### Credit Bureau reporting

Added **CB Reporting** panel for viewing pending and historical credit bureau reporting information and manage reporting of accounts to credit bureaus.

## Disputes

Added **Disputes** panel for maintaining collection activity disputes for accounts. Collection activity and interest calculations are suspended while an account has an open dispute.

## Email addresses

Added **Email** panel for maintaining email addresses for accounts.

## Income and expenditures

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

## Joined accounts

Added **File Number**, **Account Number**, and **Status** to **Joined Accounts** card.

## Letters

Added **Letters** panel for requesting and managing letters.

## Linked accounts

- Added a Link icon to the **Joined Accounts** card to signify the driver account in a group of linked accounts.
- Added message to **Manage Links** dialog box that displays when a party that a user selected to link to has an active arrangement. Users cannot create a link in this case.
- Added message to **Manage Links** dialog box that displays when a party that a user selected to link to is linked to other parties. Users have the option to link to the other parties or cancel linking.

## Payment arrangements

- Added ability to reschedule a scheduled payment arrangement in the **Scheduled Payments** card.
- Added ability to search for and select an ABA (bank) routing number in the **Payment Instrument** dialog box.
- Added **Select/Deselect All Active** option for selecting or deselecting all active joined accounts when proposing a payment arrangement.

## Permissions

- Added **ACH Vendor Information** permission for specifying a vendor's settings for processing ACH payment transactions using Payment Vendor Gateway.
- Added **Allow Redaction** permission for redacting note comments.
- Added **Allow Letters** permission for specifying which letters are available to users.

**Note:** Removed this permission in SU 10. All letters are now available to users.

- Added **Batch Processor System** permission for specifying settings for the Batch Processor that creates batches of payments for each payment type.
- Added **Care and Financial Hardship Panel** permission for configuring care and financial hardships.
- Added **Complaints Panel** permission for configuring complaints.
- Added **Configuration for Handling NSF/Reversals** permission for specifying the status and queue level to assign to accounts with NSF or payment reversals imported using Exchange.
- Added **Create Scheduled Payments** permission for specifying the settings for scheduling payments on an account.
- Added **Credit Card Vendor Information** permission for specifying a vendor's settings for processing credit card payment transactions using Payment Vendor Gateway.
- Added **Disputes Panel** permission for configuring disputes.
- Added **Maintain Income and Expense items** permission for specifying whether users can add and modify income, expenditure, and arrears information in the **Income and Expenditure** panel.
- Added **Trigger Values** permission for specifying the Common Financial Statement trigger values for expenditures.
- Added **Name Template Config** permission for configuring name formatting.
- Added **Paper Draft Vendor Information** permission for specifying a vendor's settings for processing paper draft payment transactions using Payment Vendor Gateway.
- Added **Prevent Multiple Account Access** permission for preventing users from accessing the same account simultaneously.
- Added Bankruptcy, Court Case, and Garnishment Case Number to the available search options in the **Search** permission.

## Phones

Removed display of multiple phone numbers from the **Contact Information** tab. If a person has multiple phone numbers, the system displays one phone number of each type only. You can still view all phone numbers for an account on the **Phones** panel.

## Sole responsibility

- Added **Request Sole Responsibility** option to **Account Navigator** card for requesting sole responsibility for a party on an account.
- Added **Approve/Deny Sole Responsibility** option to **Account Navigator** card for approving or denying requests for sole responsibility for a party on an account. If a user approves the request, the system places the other parties on hold to suspend collection activity for those parties on that account.

## System codes

- Added **Care Type** panel for maintaining customer care types.

- Added **Complaint Category** panel for maintaining complaint categories.
- Changed check box label from **Allow accounts in this desk to be linked** to **Prevent linking of accounts in this desk** in the **Desk** dialog box.
- Added ability to sort columns in the data grid in the **Desk** panel.
- Added ability to search for desks in the **Desk** panel.
- Added **Dispute Type** panel for maintaining dispute types.
- Added **Hardship Type** panel for maintaining financial hardship types.
- Removed ability to add list codes and modify system-defined list codes and data in the **List Data** panel.
- Removed ability to delete list codes and data in the **List Data** panel.

## Latitude Console

Latitude Console 12.0 SU 3 includes the following new features for payments:

- Added ability to select accounts among which to split payments in the Linked Accounts data grid on the **Account** tab in the **Payment Entry** window.
- Added totals for applied amount, difference, linked balance, and selected balance to the **Account** tab in the **Payment Entry** window.

## System Requirements

System requirements for Latitude 12.0 SU 3 include the following:

- Removed Windows XP Professional from minimum software requirements.
- Changed Example Multi-site Network diagram to include IIS web servers.
- Added ability to configure the "clr enabled" command to allow running user assemblies on the SQL Server.
- Added ability to configure the "clr enabled" command to allow running user assemblies on the SQL Server.
- Removed support for Microsoft Windows Server 2008 and IIS 7.0 for the Web server.

## Web Access

Web Access 12.0 SU 3 includes the following new features for reports:

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

## New Features in 12.0 SU 2

The following products or components include new features in 12.0 SU 2:

- [AIM](#)
- [AIM Receiver Manager](#)
- [Installation and Configuration](#)
- [Latitude](#)
- [Web Access](#)

### AIM

AIM 12.0 SU 2 includes the following new features:

- Added "Work Effort Import File" layout for importing letter and note work efforts received from outside collection agencies and attorneys holding the accounts.
- Added "Demographics Import File Address" layout for importing customer addresses received from outside collection agencies and attorneys holding the accounts.

### AIM Receiver Manager

AIM Receiver Manager 12.0 SU 2 includes the following new features:

- Added ability to configure letter work efforts on the **Letter Efforts** tab of the **Work Effort** tab in the **Client Configuration** window.
- Added ability to configure note work efforts on the **Note Efforts** tab of the **Work Effort** tab in the **Client Configuration** window.
- Added ability to export letter and note work efforts on the **Process** tab in the **Client Configuration** window.

### Installation and Configuration

Installation and configuration for Latitude 12.0 SU 2 includes the following new features:

- Added ability to configure Latitude for federated authentication, which allows users to provide their local corporate credentials to log on to Latitude.
- Added requirement to enable client-side polling of the event queue to ensure that the Dialer functions properly when using Internet Explorer to run Latitude.
- Added ability to configure the API key for Job Service to use when processing payments.
- Added ability to remove handlers that block DELETE verbs to resolve potential issues with logging off Latitude.
- Added ability to configure IIS for Latitude to allow overriding the Windows authentication settings.

## Latitude

Latitude 12.0 SU 2 includes several new account-related features, permissions, and system codes.

### Account links

Added **Manage Links** dialog box for creating and removing links to accounts.

### AIM work efforts

Added **Work Efforts** tab to the **AIM** panel for viewing work efforts for accounts placed with an outside collection agency or attorney.

### Anchor cards

- Added **Account Navigator** card for displaying contact information for the parties on an account.
- Added **First Party Active Collections** card for displaying first-party active collections information for an account.
- Added **Joined Accounts** card for displaying all accounts associated to the parties on the account displayed in the **Work Form**.

### Call validation

Added **DPA Validation** dialog box for validating a party on a call before displaying an account in the **Work Form**.

### Client guidelines

Added **Client Guidelines** panel for viewing the guidelines that clients established for working accounts.

### Collection holds

Added **Manage Holds** dialog box for placing and removing account-level and customer-level holds on accounts.

### Manage interest

Added **Manage Interest** dialog box for starting and stopping customer-level interest on accounts to override and reinstate the account-level interest.

### Parties

Added **New Customer** dialog box for adding parties to accounts.

### Payment arrangements

Added **Arrangements** panel for proposing, scheduling, and managing payment arrangements.

### Permissions

- Added **Configure Data Protection Validation Instructions** permission for specifying the instructions to display in the **DPA Validation** dialog box.



- Added **Customer Information Profiles** permission for specifying customer profiles for Payment Vendor Gateway.
- Added **Payment Method Fee Schedule** permission for associating payment methods with fee schedules.
- Added **Require Data Protection Validation** permission for validating specific information with a caller before displaying the account.
- Added **Settings for Auxiliary Products** permission for specifying the settings to allow auxiliary products to create payments in Latitude.
- Added **Task Panels** permission for specifying the task panels that users can view in the **Work Form**.

### System codes

- Added **Anchor Cards** panel for managing the anchor cards available to display in anchors.
- Added **Anchors** panel for grouping anchor cards and displaying them in the Work Form.
- Added **API Key Manager** panel for managing API keys for accessing APIs remotely.
- Added **Manual Process Stages** panel for flagging processes as either manual or automated.
- Added **Payment Sub-Batch Type** panel for creating groups to categorize payment sub-batch types.
- Added **Process Stages** panel for maintaining account processes and stages.

### Web Access

Web Access 12.0 SU 2 includes the removal of the default "upload" and "download" folders when transferring files.

### New Features in 12.0 SU 1

The following products or components include new features in 12.0 SU 1:

- [Latitude](#)
- [Latitude Console](#)
- [System Requirements](#)

### Latitude

Latitude 12.0 SU 1 includes several new account-related features and reference panels.

### Account labels

Added **Account Labels** card for creating, assigning, viewing, and deleting labels associated to accounts.

### Account processes and stages

Added **Processes** menu with options for starting an account in the first stage in a process and then moving the account to the next or previous stage. Administrators and management create and manage the process stages available to users.

### Hot notes

Added **Hot Notes** card for adding hot notes to an account to display important information for working an account. The system doesn't retain hot note history and any user can modify or delete hot notes.

### Legal case

Added **Legal** panel for viewing and modifying court cases for customers who are currently in litigation for non-payment.

### Letters

Added **Letters** panel for requesting letters, viewing pending letter requests, deleting pending letter requests, and viewing letter request history.

### Linked accounts

Added **Link Details** panel for viewing all accounts linked to a single customer.

### Open interactions

Added **Open Interactions** panel for viewing all accounts that have open interactions, opening the account in the **Work Form**, or closing the open interaction.

### Payments

Added ability to schedule and process a single payment for an account in the **Arrangements** panel.

**Note:** Removed this functionality in SU 11.

### Reference panels

- Added **Documentation** panel for viewing, adding, and deleting documents associated to an account.
- Added **Events** panel for viewing actions that occurred on an account for auditing purposes. For example, a user changed the status of an account.
- Added **Fusion Service History** panel for viewing service requests (such as address verification) and the responses received from outside vendors. Users with the appropriate permissions can verify the responses.
- Added **Payment History** panel for viewing payment history for charged-off accounts.
- Added **Processes** panel for viewing the processes and stages through which users moved an account.

### Timed reminders

- Added **Set Timed Reminder** dialog box for settings timed reminders to appear for a desk at a specific date and time.
- Added **Reminders** dialog box for viewing timed reminders for a desk, rescheduling a reminder, and dismissing a reminder.

### Latitude Console

Latitude Console 12.0 SU 1 includes new features for payments, custom queue manager, and fee schedules.

### Custom queue

Removed the **Require the user to set a follow-up date on accounts worked in the custom queue check box** from the **Schedule Custom Queue** window.

### Fee schedules

Added **Alloc%** to the **Fee Schedules** dialog box for allocating a collection cost that is some percentage of the amount of the payment, or remaining payment amount in the case that the system allocates other buckets first.

### Payments

- Added **Judgment Date** and **Case Number** to the **Payment Entry** window for accounts that have these values.
- Added ability to specify the columns to display in the linked accounts grid in the **Payment Entry** window and the display order using the **Grid: Linked Accounts** dialog box.

### System Requirements

System requirements for Latitude 12.0 SU 1 include the following new features:

- Added minimum hardware requirements for virtualized Terminal servers, virtualized SQL servers, and virtualized Tokenizer servers.
- Added Microsoft Windows Server version 2008 R2; or 2012 Standard or Enterprise Edition x64 software requirement for virtualized infrastructure.
- Added support for Microsoft Windows Server 2008 R2 and 2012.
- Added support for SQL Server 2008 R2 and 2012.
- Added support for Microsoft Windows 7 and Microsoft Windows 8.
- Removed support for Microsoft Windows Server 2003.
- Removed support for SQL Server 2005.