INTERACTIVE INTELLIGENCE®
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New Features for:

Release: Liquid Latitude 3.0 SU 12
Built on:12-Nov-2018

New features included in release 3.0 SU 12

The table below summarizes the new features added in this release

SCR	Description/Details
Component: Credit Bureau Reporting	
LIQ-5746	**Minor changes around how amount past due and charge off amount are reported. Mostly only affects 1st party.**
	If Bankruptcy is discharged then amountPastDue is 0.00 (regardless of industry or chargeoff).
	If Bankruptcy is petitioned and chapter 12 or 13 then amountPastDue is 0.00 (regardless of industry or chargeoff).
	If Status is not chargeoff status (64 or 97) then ChargeOffAmount is by definition 0.00.
	If status is current (11) then amountPastDue is by definition 0.00.
Component: Database	
LIQ-6226	**Added Permission option to use Microsoft Word for editing template and merge printing for Letter Console. This matches previous functionality before the implementation of the Spire changes.**
LIQ-6068	**Adding WebAccess account report that includes AIM details.**
	Added a default account report that you can switch to in the permissions, that shows basic agency details on placed accounts.
LIQ-6061	**Adding WebAccess account report that includes AIM details.**
	Added a default account report that you can switch to in the permissions, that shows basic agency details on placed accounts.
Component: Liquid Center	
LIQ-5739	**Added new columns to the Medical Details Anchor.**

Added two new columns to the Medical Details Anchor:

Patient Name
Service Date

LIQ-5738 | **Linked views throughout the application will not load closed accounts unless the user presses a button, or they pop a closed account.**

Account Navigator
Medical Account Details
Link Details

Will not load closed accounts unless the user presses a button, or they pop a closed account.

Component: Liquid Portal

LIQ-6740 | **Web Work form image branding updated!**

Updated legacy ININ logos to new Genesys logos.

LIQ-6371 | **Support Queue Anchor Card allows removal from queue**

The Support Queue anchor card has been modified to allow the user to directly remove the account from a specific clerical / support queue.

This allows for direct access to the account and removal from the appropriate queue without having to traverse the queue to find the account.

LIQ-6370 | **Changes to Email Add Panel and Consent Management**

The Email Add/Edit panel has been updated to include the consent settings for use of the email.

The context menu option to access the Email consent panel has been removed as this is now handled on the Add/Edit panel

LIQ-6369 | **Phone Add/Edit Panel & Consent Panel Changes**

The phone add/edit screen has been modified to now include the consent management fields and the context menu used to access the consent settings has been removed.

LIQ-6368 | **New Account Summary Anchor Card**

A new anchor card has been added named "Account Summary" and provides details primarily for 3rd party charged off accounts. Information available on the anchor includes; client/customer, client account number, original creditor, last payment date, last paid date, charge off date, received date, original and current balance along with last worked and last contact dates

LIQ-6367 | **Party Navigator Anchor Card Update**

The Party Navigator anchor card has been modified to now include alerts that indicate if the debtor/customer has open Complaints, Disputes, Hardship cases or if there is Bankruptcy, Decease, Attorney or CCCS information on the account.

Anchor now also displays best Home, Work and Cell/Mobile phone numbers for the focused party

All new features from prior releases

Below is the complete description of all prior releases new features that are included in this update.

New features in release 3.0 SU 10

SCR	Description/Details

Component: Credit Bureau Reporting

LIQ-5172	**Adding new custodian procedure cbrForceDeletesByStatus.** This procedure added to the custodian cbr task steps will determine all accounts that are currently in a report/delete configured status and make the appropriate update to force a DA accountstatus determination.
LIQ-5015	**New function which provides an unpivoted view of the cbr Exceptions. Similar to the cbrDataExceptionDtl() function.** The function cbrDataExceptionDtlex() will provide a result set containing the Accountid, Debtorid and error message for all respective exceptions.
LIQ-4948	**The cbrAccountHistory function has been altered to take into account any deletes on the account that have occurred preceding the original or last initiated Dispute. When the account has last been deleted the function will return an account that is not is dispute. This will allow the account to once again be reported as a dispute provided the Agency has vetted the data.** The cbrResetCbrPrevent procedure will need to be executed prior to the bulk evaluation in Custodian. The first run will clear the cbrPrevent flag for qualifying accounts. The evaluation will then repopulate the cbr_accounts table which would then have the compliance condition set by the second or post execution of the procedure named cbrForceDisputesByStatus.

Component: Database

LIQ-5359	**Optional credit bureau reporting of compliance condition changed from one time reporting to everytime reporting.** the compliance condition code in the credit bureau report is reported for as long as it is valid.
LIQ-5112	**Cannot map to IsAuthorizedUser for debtors in Exchange.** IsAuthorizedUser can be mapped for debtors in Exchange.
LIQ-4694	**A pre-existing functionality known as Initialization which was developed for Clients to utilize during implementation is now available via a system level configuration.** If configured the cbr evaluation procedures will allow regeneration of previous paid in full and delete report codes. By default this provides the capability to delete a previously reported paid in full account as a delete. This is a temporary allowance to provide medical clients the choice to delete accounts that have been determined to be paid by Insurer and therefore a non outstanding debt. Closed and returned configured accounts will also include previously reported paid in full accounts.

Component: Infrastructure

LIQ-4771   **New Collection Cost mode of "Current Gross"**

Supports collection cost mode for taking a certain percentage from each payment up front towards collection cost, and the current collection cost amount is the percentage of the gross balance after collection cost is included. This differs only slightly from "Current Balance" in that "Current Balance" uses the collection cost percentage as a percentage of the current balance for the collection cost current value.

Component: Liquid Center

LIQ-5442   **Changes to the judgement panel.**

Moving insert logic to a trigger on the db.

LIQ-5427   **Debtor Name updating.**

The debtor name, which gets used for credit reporting, was getting updated when there was not a debtor's name change. This issue caused credit reports to report a name change.

LIQ-5348   **Fixed Arrangements History status - 'system-error' message when rescheduling arrangements.**

Added a status to the arrangement history tab - 'superseded' which will appear when the user reschedules an arrangement.

LIQ-5342   **Filter out closed accounts in the Link Summary Anchor Card**

Logic has been added to filter out closed accounts from the returned data set for the Link Summary Anchor Card.

LIQ-5224   **Clean ups on client and server.**

Clean ups on client and server by using client side api services

LIQ-5220   **Retrieved the most important data first.**

Retrieved the most important data first in order to fill anchors identified as Priority 1.

LIQ-5209   **Performance enhancements to status modal.**

Fixed issue with status modals not destroying watches that was creating performance issues on the workform.

LIQ-5193   **Refactored to not use multi-party or multi-account methods of context service**

Refactored to not use multi-party or multi-account methods of context service.

LIQ-5158   **Added medical Account details/ Navigator anchor card**

Card that is identical to the linking anchor/liked account anchor/account link details/account navigator except has the Recieved Date and clidlc fields from master, in addition to the ability to sort the columns.

LIQ-5156   **Added clidlc and recieved to chargedoff and not chargedoff views on the Link Details account panel**

Had to add clidlc field to the lat.Account view and associated data objects, made a few template changes for columns to show up in link details.

LIQ-5155   **New Link Summary Anchor Card added**

A new link summary anchor card is available for charged off accounts. It shows balance data for the link grouped by customer.

LIQ-5152   **The Sole Responsibility doesn't depend on multi-party or multi-account methods of context service.**

The Sole Responsibility doesn't depend on multi-party or multi-account methods of context service. IT has been replaced with a new api call.

LIQ-5141   **The peek endpoint is now configurable as to whether or not it's enabled or disabled.**

The peek endpoint is now configurable as to whether or not it's enabled or disabled. If you do not need the peek endpoint, you should leave it disabled. By doing so you will see a performance increase when loading linked accounts. The core software no longer depends on the peek endpoint. The only reason you'd need to enable it is if your custom overlay makes use of it. To enable it, set [BitValue] to 1 in the [GlobalSettings] table where [NameSpace] = N'WorkForm' and [SettingName] = N'Enable Peek Endpoint'.

LIQ-5130   **Performance Metrics are present in i3trace log (Filter:"Topics")**

Performance Metrics are present in i3trace log (Filter:"Topics"). Tested on http://maltlavasystest/InteractionCollectorWebClient/workform/

LIQ-5125   **Made changes to endpoints to avoid long request body which creates bad request.**

Convert the endpoints below from get to post. To avoid long request URLs in account with large number links. These long URLs won't allow these http request to be completed.
account/accountStatuses
account/balances
arrangement/getPaymentMethodVerbiage
arrangement/getUnusableDays
arrangement/getSettlementAmount
arrangement/spreadPermission?

LIQ-5101   **Made changes to endpoints to avoid long request body which creates bad request.**

Convert the endpoints below from get to post. To avoid long request URLs in account with large number links. These long URLs won't allow these http request to be completed.

LIQ-5092   **Performance Fixes on Linking Details.**

Removed automatic refresh to increase UI performance and make it more responsive to user input. Refresh button added to form to get new data.

LIQ-5091   **Performance enhancements to the Arrangements Joint Account List.**

Arrangements Joint Account List will no longer automatically refresh after changes. A refresh button has been added.

LIQ-5068   **Default the subject party on letters to the responsible party**

When ordering a letter from the Letter Panel, default the dropdown to the responsible party.

LIQ-4967   **Closed accounts removed from calculation of responsible party balance.**

Closed accounts are now excluded from the summation of account balances for responsible parties in the Account Navigator anchor card

LIQ-4939 **The changes should improve a performance for a large number of links**

The changes should improve a performance for a large number of links.

LIQ-4934 **Responsible Party Balance, Account Balance Total labels on Account Navigation anchor card do not convey what the balances represent.**

Changed to Responsible Balance and Collectible Balance respectively.

LIQ-4886 **Adding paging to the Account Navigator Anchor Card.**

The Account Navigator Anchor Card will now use paging if the number of linked accounts is greater than 4.

LIQ-4851 **Performance enhancement to saving new or updating existing arrangements**

Approximately a 30-40% decrease in time when saving new or updating existing arrangements

LIQ-4725 **if a Payment Custom Spread Override is in place, payments will spread in the order specified, rather in the globally configured**

new facility for user to override account payment spread priority

LIQ-4669 **Added additional validation and an option for whether to copy data from a erson to a new person when unlinking an account**

Added validation for checking the link console settings on manual linking. Also added a checkbox on removing a link that allows the user to tell the server whether or not it wants to copy data over to the new person in the link.

LIQ-4647 **Functionality to be added that allows users to complete the judgment award process on an account.**

Various features have been added to allow the user to complete the awarding and reversing of judgments on a series of linked accounts. This includes a new judgment spread calculator that allows the user to enter in amounts for each judgment category across all accounts involved in the judgment.

LIQ-4538 **A system permission exists in Administration to toggle the cache on/off.**

Allows server caching of Permissions

LIQ-4479 **Permissions added for Manual Linking, Interest, and Holds.**

3 new permissions were added in administration under applications/liquid latitude/account actions. These permissions control whether or not a user is able to manually link accounts, start/stop interest, and add account/customer holds.

Nightly, Custodian will review arrangements and closed accounts and in the event that all accounts in the arrangement are closed, the arrangement will be cancelled (all future payments marked as Cancelled) and a summary note will be written similar to - ""Arrangement Cancelled - # of payments totaling ####.##"" (currently this part is in Custodian but it writes a note for each payment being cancelled which is undesirable and is probably not performing the logic correctly for linked accounts)

[dbo].[spSetArrangementInactiveForClosedAccounts] is the name of the new sproc, it doesn't take any parameters.
LIQ-4441 **"**

If an account is closed payments will no longer process on closed accounts, if the arrangement had multiple accounts in it, payments will still apply to the open accounts

User can no longer select closed accounts for an arrangement

User can no longer unlink an account from other accounts if it is involved in a linked account arrangement

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LIQ-4388	**Added JoinedDebtorID logic to reduce data duplication across the JoinedDebtorID link** Joined debtors are now associated with each other for the purpose of realizing the concept of a person, who has a single set of data unique to that person. For the time being that information is Address, Email, Complaints, Income and Expenditure, Care and Financial Hardship.
LIQ-4074	**Fields to be removed from the status configuration under system codes and settings in administration.** A number of superfluous fields have been removed from the status configuration under System Codes and Settings in administration. UI improvements have also been made to closer match the UI from previous versions of this product.
LIQ-4027	**New feature to view pending and processed payments being credited.** The Collector/Agent Information modal displays postdated and processed payments filtered by user, user desk, and date.

New features in release 3.0 SU 9

SCR	Description/Details

Component: Credit Bureau Reporting

LIQ-5015	**New function which provides an unpivoted view of the cbr Exceptions. Similar to the cbrDataExceptionDtl() function.** The function cbrDataExceptionDtlex() will provide a result set containing the Accountid, Debtorid and error message for all respective exceptions.

LIQ-4988   **A new larger integer type cbrException32 column has been added to the master and debtors tables and will supersede the former cbrException column.**

No change to functionality.

LIQ-4981   **Updates to CBR Exceptions UI**

The UI that displays CBR exceptions has been updated to accomodate the new database function that returns the account and debtor exceptions from the CBR process.

LIQ-4980   **Updated cbr endpoint to properly update the specialnote field on master.**

The specialnote field on master was recently added, and now gets correctly updated with the CBR delete codes when a cbr record is deleted.

LIQ-4948   **The cbrAccountHistory function has been altered to take into account any deletes on the account that have occurred preceding the original or last initiated Dispute. When the account has last been deleted the function will return an account that is not is dispute. This will allow the account to once again be reported as a dispute provided the Agency has vetted the data.**

The cbrResetCbrPrevent procedure will need to be executed prior to the bulk evaluation in Custodian. The first run will clear the cbrPrevent flag for qualifying accounts. The evaluation will then repopulate the cbr_accounts table which would then have the compliance condition set by the second or post execution of the procedure named cbrForceDisputesByStatus.

Component: Database

LIQ-5004   **Bank records could not store Account Numbers larger than 20 characters and International Bank Account Numbers are 32 characters.**

Upped the character limit from 20 to 32 in all functionality in the workform using a bank account number.

Component: Infrastructure

LIQ-4771   **New Collection Cost mode of "Current Gross"**

Supports collection cost mode for taking a certain percentage from each payment up front towards collection cost, and the current collection cost amount is the percentage of the gross balance after collection cost is included. This differs only slightly from "Current Balance" in that "Current Balance" uses the collection cost percentage as a percentage of the current balance for the collection cost current value.

Component: Liquid Center

LIQ-5019   **Changes to JudgmentDate and InterestFromDate in the legal panel.**

In the judgment tab of the legal panel a change was made to make the Judgment Date field required. The Interest from Date now defaults to Judgment Date if the user does not select an Interest from Date.

LIQ-5008   **Accrued Interest field removed from judgment UI**

The accrued interest field was removed from the judgment UI. The same data can be viewed from the balance details pane for both the focused account and summed linked accounts.

LIQ-4984   **Warning message added to the legal panel general tab.**

To improve UX, a warning message was added to the legal panel general tab and outlines the linking requirements for the legal process.

LIQ-4983   **Ability to delete legal cases**

Functionality has been added that allows users to delete legal cases when the permission for their user account has been enabled. If judgment has been awarded, legal cases cannot be deleted until the judgment has been reversed.

LIQ-4962   **Previous balance fields need to be stored for each account.**

New Previous Balance fields have been added to store the balances on the accounts immediately prior to the awarding of a judgment. A sum of these balances for all accounts in the judgment link display in the main judgment panel once a judgment has been awarded. Null values are stored in these fields until judgment is awarded, and in the event of a reversal.

LIQ-4961   **Master.FirstInterest should be updated with the Interest From Date when awarding judgments.**

A change was made to update Master.FirstInterest and store off the previous value when judgments are awarded. Likewise, the previous value is restored when judgment is reversed.

LIQ-4956   **Removing Account Update Call when popping accounts.**

Removing the Account Update Call when popping accounts to increase performance.

LIQ-4917   **Judgment tab of the Legal Panel requires more intuitive form validation.**

Changes were made to the UI to more clearly inform the user when there is invalid data in the panel fields. The save button is also disabled if there is any bad user input.

LIQ-4913   **performance fixes for email panel**

removed extra variable that was unused int he edit modal

LIQ-4888   **Unnecessary code exists in the sole responsibility functionality.**

A line of code was removed from the sole responsibility functionality that will slightly improve performance.

LIQ-4812   **Interaction.Peek - the financial queries happen for all the account Id's at once**

Interaction.Peek: the financial queries happen for all the account Id's at once.

LIQ-4809   **Peek Endpoint Performance changes - Efforts to increase workform performance.**

Peek Endpoint Performance changes - Refactored the anchor, task and reference queries to avoid multiple unnecessary calls to the database to increase performance on the workform.

LIQ-4808   **Performance improvements needed when popping many linked accounts.**

Changes were made that reduce the number of database queries made when

popping accounts with many links.

LIQ-4802 **Improve pop performance**

Removed dependency on ILinkingManager and directly queried to improve pop performance

LIQ-4794 **Removing Account Update Call when popping accounts.**

Removing the Account Update Call when popping accounts to increase performance.

LIQ-4777 **Various sub features added to the judgment tab of the legal panel.**

Additional functionality has been added to the judgment tab of the legal panel to improve user experience. Including but not limited to: additional error messages, disabling of buttons, confirmation message boxes, and a change to how the accrued interest checkbox selections are stored in the database.

LIQ-4726 **Desired name formatting not persisted to database and is only interpolated on workform.**

Updated any writes to the debtor table so it adheres to configured name template.

LIQ-4725 **if a Payment Custom Spread Override is in place, payments will spread in the order specified, rather in the globally configured**

new facility for user to override account payment spread priority

LIQ-4724 **Maximum Days to Payment threshold not enforced in Arrangements panel.**

Enforced via change in logic order existing in proposal of an Arrangement.

LIQ-4599 **Judgment Date and Date Judgment Recorded fields need to have max date set.**

Max date attributes have been added to the Judgment Date and Date Judgment Recorded datepickers in the judgment panel. Users may not select a date later than the current day.

LIQ-4441

Nightly, Custodian will review arrangements and closed accounts and in the event that all accounts in the arrangement are closed, the arrangement will be cancelled (all future payments marked as Cancelled) and a summary note will be written similar to - ""Arrangement Cancelled - # of payments totaling ####.##"" (currently this part is in Custodian but it writes a note for each payment being cancelled which is undesirable and is probably not performing the logic correctly for linked accounts)

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LIQ-4388   **Added JoinedDebtorID logic to reduce data duplication across the JoinedDebtorID link**

Joined debtors are now associated with each other for the purpose of realizing the concept of a person, who has a single set of data unique to that person. For the time being that information is Address, Email, Complaints, Income and Expenditure, Care and Financial Hardship.

Component: Liquid Portal

LIQ-4729   **there's a new payment spread algorithm, which prioritizes based on fee schedule bucket, buckets across arrangement accounts are filled before other criteria**

new payment spread mechanism: fee schedule bucket priority

New features in release 3.0 SU 8
SCR   **Description/Details**

Component: Infrastructure

LIQ-4771   **New Collection Cost mode of "Current Gross"**

Supports collection cost mode for taking a certain percentage from each payment up front towards collection cost, and the current collection cost amount is the percentage of the gross balance after collection cost is included. This differs only slightly from "Current Balance" in that "Current Balance" uses the collection cost percentage as a percentage of the current balance for the collection cost current value.

Component: Liquid Center

LIQ-4777   **Various sub features added to the judgment tab of the legal panel.**

Additional functionality has been added to the judgment tab of the legal panel to improve user experience. Including but not limited to: additional error messages, disabling of buttons, confirmation message boxes, and a change to how the accrued interest checkbox selections are stored in the database.

LIQ-4719	**Arrangements policy does not allow for prohibiting settling an account on the client level.**
	Added a part to the Create Scheduled Payments policy that allows/disallows settling of accounts on the client level
LIQ-4646	**Judgment functionality expanded to allow users to manage the entire judgment process from the liquid workform.**
	Functionality was added to the workform legal panel that allows the user to manage the entire legal judgment process and award/reverse judgments on linked accounts.
LIQ-4632	**Account Navigator Anchor Card displays the Responsible Party Balance**
	Account Navigator Anchor Card displays the Responsible Party Balance for Joined Debtors
LIQ-4620	**Allow configuration of the payment frequency options in the Arrangements panel.**
	Added a part to the Create Scheduled Payments policy to allow configuration of the payment frequencies available via dropdown in the Arrangements panel.
LIQ-4418	**ExtraData field lengths upped to 128 (from 30)**
	ExtraData field lengths upped to 128 (from 30)
LIQ-4388	**Added JoinedDebtorID logic to reduce data duplication across the JoinedDebtorID link**
	Joined debtors are now associated with each other for the purpose of realizing the concept of a person, who has a single set of data unique to that person. For the time being that information is Address, Email, Complaints, Income and Expenditure, Care and Financial Hardship.

Component: Liquid Portal

LIQ-4729	**there's a new payment spread algorithm, which prioritizes based on fee schedule bucket, buckets across arrangement accounts are filled before other criteria**
	new payment spread mechanism: fee schedule bucket priority

New features in release 3.0 SU 7

SCR	Description/Details

Component: Database

LIQ-4694	**A pre-existing functionality known as Initialization which was developed for Clients to utilize during implementation is now available via a system level configuration.**
	If configured the cbr evaluation procedures will allow regeneration of previous paid in full and delete report codes. By default this provides the capability to delete a previously reported paid in full account as a delete. This is a temporary allowance to provide medical clients the choice to delete accounts that have been determined to be paid by Insurer and therefore a non outstanding debt. Closed and returned configured accounts will also include previously reported paid in full accounts.

LIQ-4693   **tr_master_update trigger enhanced to include logic for status updates that result in a cbrdelete or isfraud condition and will update the appropriate master row and set the specialnote column to 'DA' which will then be picked up by the next evaluation.**

Previous functionality for status bit configurations re-introduced via trigger on the master table. When the status is changed to a configured status with the cbrReport and cbrDelete flags set a 'DA' or for isFraud 'DF' will be uupdated to the respective master.specialnote.

Component: Liquid Center

LIQ-4696   **Performance fixes for Letters api andpoint**

A fairly major refactor to the letters endpoint to increase performance and reduce the number of SQL calls to the database. No major functionality changes were made with this SCR.

LIQ-4662   **Added Separate Direct invoice type**

The new Separate Direct type will creates 2 separate invoices, one for direct payments and the other is for everything else. The direct payments invoice is always gross and the other is whatever the customer setting is for invoice method.

LIQ-4619   **Direct Debit Guarantee Button Added to Wallet**

If you open the Wallet Editor, you will now see a Direct Debit Guarantee button on the Direct Debit tab. Clicking it will give you the Direct Debit Guarantee verbiage.

LIQ-4618   **Arrangement Panel Now Shows Payments with Status of Completed**

Scheduled payment transactions will show in the Arrangement Panel that have a status of Completed. They are not editable as these payments have already been sent out.

LIQ-4597   **Minor changes to events surrounding the employment tab of the customer panel.**

Changed the employment verified/unverified events to display all the same fields as the EmplymentChanged event. Also, when one of those events is trigger by user interaction with the record the EmploymentChanged event doesn't fire.

LIQ-4526   **Added functionality to allow the user to view the balance from the time the letter was printed.**

a new table, trigger, and some UI changes have been added to facilitate the copying of the balance buckets to a new table, to allow the user to view the balance history details when viewing the letter history details in the workform.

Component: Liquid Portal

LIQ-4688   **This is for "generic" reference panel(s) that takes a stored procedure as a parameter to display read-only data on an account in Collector.**

Instructions for use:
1) Create a stored procedure that takes in one parameter that is @accountid as an INT. This is the master.number or file number value.

2) INSERT a row in to a table to define the panel. The only values that need to remain the same are the 'Type' and 'Url' column. Sample:

```
INSERT INTO [lat].[UserInterfacePlugins]
( [Type] ,
[PluginName] ,
[DisplayName] ,
[Url] ,
[Parameters]
)
VALUES ( 'PANEL' , -- Type - varchar(25)
'GenericDataPanel' , -- PluginName - varchar(50)
N'Generic Data Grid Panel' , -- DisplayName - nvarchar(100)
N'workform/views/panel/genericPanel.tmpl.html' , -- Url - nvarchar(250)
'dbo.TestSproc' -- Parameters - varchar(255)
)
```

3) Enable the panel for roles/users/etc in the administration application.

New features in release 3.0 SU 6

SCR	Description/Details

Component: Database

LIQ-3795	**The note_referenced table now has a prinmary key independent of the note id it relates to**
	This allows for notes to be referenced by more than one event.

Component: Liquid Center

LIQ-4619	**Direct Debit Guarantee Button Added to Wallet**
	If you open the Wallet Editor, you will now see a Direct Debit Guarantee button on the Direct Debit tab. Clicking it will give you the Direct Debit Guarantee verbiage.
LIQ-4618	**Arrangement Panel Now Shows Payments with Status of Completed**
	Scheduled payment transactions will show in the Arrangement Panel that have a status of Completed. They are not editable as these payments have already been sent out.
LIQ-4523	**Enhancements to the linked account selection modal**
	An advanced selection options section has been added to the linked account selection modal for linked account status updates and linked letters.
LIQ-4519	**Adding "employment verification" to the customer task panel.**
	Three fields have been added to support this: JobVerified (boolean), JobVerifiedWhen, JobVerifiedBy. modifying the record un-verifies the record and it must be verified again.
LIQ-4418	**ExtraData field lengths upped to 128 (from 30)**
	ExtraData field lengths upped to 128 (from 30)
LIQ-4398	**a client may be configured with a maximum surcharge, use 0 to disable entirely, or blank for unrestricted**
	surcharges can be restricted / capped by client

LIQ-4387   **Notes panel now has a filter to separate system notes and user notes**

There is a new filter on the notes panel that allows a user to choose whether they see notes created by users, the system, or all of the above.

LIQ-4264   **adjust batch processor summary screen to account for surcharges**

Batch processor summary screen has amount summaries split into Processed, Succeeded, Failed, and Posted. Amounts now include surcharge transactions. The batch run report shows surcharge transactions discretely and includes vendor reference #s for all transactions.

LIQ-4026   **Support Queue anchor card has been added**

The support queue anchor chard only displays when there is a corresponding record in the supportQueueItems table. It is available to be moved in the anchor card section of the administration tool.

Component: Liquid Portal

LIQ-4394   **UX improvements to the administration tool.**

The Administration tool has been given a maximum height, and now applies a scroll bar to the category side as well as the detail section when they exceed the height of a typical monitor.

LIQ-4392   **Arrangement History panel added.**

Arrangement History allows for a user to see all previously scheduled arrangements from the Scheduled Payment table and some of the fields.

LIQ-1469   **Multiline policy textparts are now supported in the liquid administration tool**

Added a toggle for the multiline="true" attribute of the textpart policypart

New features in release 3.0 SU 5

    SCR   **Description/Details**

Component: Database

LIQ-4306   **New Word Merge fields are added to comply with New York Regulations.**

New Word Merge fields added for New York State regulations compliance. Also, new panel is available for quick reference of values.

LIQ-4290   **Allowing users to selectively request letters at the account level required underlying changes to how letters are processed.**

Alter procedure that processes letters.

LIQ-4039   **Include NITDSendDate in views.**

NITDSendDate needed to process Letter requests through Custodian.

LIQ-3795   **The note_referenced table now has a prinmary key independent of the note id it relates to**

This allows for notes to be referenced by more than one event.

Modified script to use ScheduledPayment table (and support views).

LIQ-3625 **Replaces use of old Classic payment tables (pdc, DebtorCreditCards, and Promises).**

Component: Liquid Center

LIQ-4496 **Letter history will now show letters that were sent and didn't have a letterRequest_account record.**

Some letter applications can create letter requests that don't have letterRequest_account records. This previously prevent them from showing up in the letter history panel on the workform. The query that was used to gather these items has been changed to accommodate for this.

LIQ-4433 **Parent Basic Invoice report did not display due us/you calculations nor did it sort properly nor did it display taxes.**

Parent Basic Invoice now looks and behaves similar to the Basic Invoice report but includes the additional grouping and subtotals expected in Parent.

LIQ-4386

LIQ-4303 **Users can now invalidate insurance records via the workform.**

3 fields were added to the insurance table, Invalid, InvalidReason, and TimelyFiling to accomodate various functionality associated with marking insurance records as invalid.

LIQ-4302 **Medical panel is now editable**

Changes were implemented that allow the user to save patient info data from the medical panel UI.

LIQ-4301 **Users can now edit insurance records from the workform.**

Provided the user has permission to view the medical panel, the button to edit insurance records will appear on each entry that appears in the panel, allowing them to edit them with the same requirements as adding a record.

LIQ-4298 **Users can now add insurance records from the workform.**

If a user has access to the medical panel, they can now add insurance records via a modal button in the workform.

LIQ-4264 **adjust batch processor summary screen to account for surcharges**

Batch processor summary screen has amount summaries split into Processed, Succeeded, Failed, and Posted. Amounts now include surcharge transactions. The batch run report shows surcharge transactions discretely and includes vendor reference #s for all transactions.

LIQ-4026 **Support Queue anchor card has been added**

The support queue anchor chard only displays when there is a corresponding record in the supportQueueItems table. It is available to be moved in the anchor card section of the administration tool.

LIQ-3812 **surcharge functionality is added to Latitude**

surcharges are applied by payment type, surcharges may be suppressed by a user with sufficient privilege, surcharges are suppressed by state or client restrictions, editing a payment updates the surcharge if the payment type is changed

LIQ-3794   **Manual status updates from the workform toolbar now supports mass updates of linked accounts.**
When a global configuration setting is set users will be able to do updates to the account status in mass for the selected linked accounts.

LIQ-3546   **adding required and missing cbr list data**
Added cbr specific list data

New features in release 3.0 SU 4

SCR	Description/Details

Component: Database

LIQ-4306   **New Word Merge fields are added to comply with New York Regulations.**
New Word Merge fields added for New York State regulations compliance. Also, new panel is available for quick reference of values.

LIQ-4290   **Allowing users to selectively request letters at the account level required underlying changes to how letters are processed.**
Alter procedure that processes letters.

LIQ-4187   **Performance issue with Linking.**
Change from use of NewId to NewSequentialId results in faster inserts for temporary records used by Linking.

LIQ-4150   **Custodian process for NITD letter merge didn't include paper draft and would error.**
Added paper draft type support to the Custodian NITD letter merge.

LIQ-3932   **Additional capability was added to the database build process to produce a standard and enterprise edition update package and model database.**
When running DBupdate you will need to choose the apprpriate file for your sql server version.

LIQ-3840   **This fixes the problem in which accounts linked after the initial NITD letter is sent out on the link driver do not get an NITD letter.**
A new workflow step will be required called in "Account Linked" that calls Letter_CreateLetterRequests

It needs the following params from the workflow:
@LetterCode varchar(5), --This is likely 1 for the NITD letter
@UserName varchar(10), -- Whatever user name you want to reflect the letter request
@AllowResend bit = 0 -- Leave this as "false"

Note that @number is a parameter, but should be left blank. The stored procedure will get it's number from the workflow in this case.

LIQ-3646   **Create a view of promises from scheduledpayment**
This allows the application of a promise arrangement to a manually entered payment.

LIQ-3562	**Credit reporting enhancements.** **ISSUE RAISED DURING USER GROUP:** **1) Minimum Balance Exclusion** **• The minimum balance required for reporting is currently compared against the original** **principal bucket on the account** **• Altering the test to use the current balance** **2) Adding audit entry for cbr exception** **• When an account or debtor is excluded from reporting due to a cbr exception the respective account is removed from the pending file and added to the excluded file.** **• An entry will be added to cbr_audit when this occurs.** • The new minimum balance test is a one time occurrence which will filter the account on current principal and the configured minimum balance allowed • Once reported the account will continue to report until finalized • The test will not cause the account to be excluded once reported • An entry written to cbr_audit when this occurs has been added and will allow the current pending status to be viewed.

Component: Infrastructure

LIQ-3771	**User is now warned if there are more than one debtor joined to the debtor selected in the manual linking dialog.** Previously there was no indication of if the debtor selected in the dialog was joined.
LIQ-3510	**Address and email fields on the customer information task panel are now disabled by default.** Address and email fields on the customer information task panel are now disabled by default. Customers are encouraged to use the address panel to manage addresses
LIQ-3501	**Make Email Type database driven** Make Email Type database driven.

Component: Liquid Center

LIQ-4386	
LIQ-4269	**CBR Evaluate button added to the CB Reporting Panel** A new button has been added to the CB Reporting panel in the account information tab to evaluate accounts on demand. This process is heavy and can be long running depending on the size of the database, therefore should be used sparingly.
LIQ-4247	**"Next Payment Batch" text box removed.**
LIQ-4210	**Found issue with Javascript math in arrangements panel** Change calculation routines for the Arrangements panel to account for odd math in javascript itself.\ For example, 9.97*100=997.0000000000001 in javascript. 9.98*100=998!

LIQ-4186

The "Hold on Account" flag in the Account Status anchor card was being raised under a condition where the account was not in a queue instead of actively having a hold against it.

Instead of assessing if the account is in a queue or not, the workform should have been assessing if there was an active hold against it. The change was made to check if there was a hold with this account number and that today's date was before the hold's expiration date.

LIQ-4112

Reversals added though collector do not adjust the status, qlevel or adjust the scheduled payment that was tied to the payment that is being reversed.

Now via a new permission located in Configuration\Payment Processing\Configuration for handling NSFS/sReversals. This will allow you to configure the Qlevel and Status change for an NSF. It will also allow you to modify the status on future scheduled payments if configured to do so.

LIQ-4083

Change made to Party Navigator Anchor

The Party Navigator anchor card now only displays responsible debtors for the focused account rather than all those on joined accounts that have been viewed also.

LIQ-4082

Visual indicators added to the workform to distinguish between Joined and Linked accounts.

Visual indicators have been added to the workform to distinguish between Joined and Linked accounts. The changes were made to the Balance Details and Link Details panes, the Account Navigator anchor card, the payment negotiator account selector in the arrangements panel, and the notes panel.

LIQ-4070

POSSIBLE BREAKING CHANGE: Configuring Access for Multiple Users to Same Account

The permission is under "Configuration" and is called "Prevent Multiple Account Access". When active, it will prevent multiple users from accesing an account simultaneously.

LIQ-3894

Accounts with open Complaints / Disputes / Cares will not print Letters unless Allow Account override is clicked for the Letter

Added field to Letters table to allow overriding when a Letter is printed.

LIQ-3868

Migrated the Medical Panel from a custom stream to the core install.

The Medical panel was initially developed in a different stream to ease deploying new updates to it. As it was originally intended to be a core panel, it is now migrated into the core stream.

LIQ-3853

Added Garnishment, Bankruptcy, and Court Case # as quicksearch options

Garnishment, Bankruptcy, and Court Case# added to quicksearch.

LIQ-3846

Functionality added to the Letters panel in the workform

The user now has the ability to select the linked accounts they wish to have a letter sent to. Linked letters are indicated with the link icon in the letter grid in the panel, a modal will appear where the user can select the accounts they wish to send the letter to.

LIQ-3812

surcharge functionality is added to Latitude

surcharges are applied by payment type, surcharges may be suppressed by a user with sufficient privilege, surcharges are suppressed by state or client restrictions, editing a payment updates the surcharge if the payment type is changed

LIQ-3774   **Manual linking now updates the link and linkI driver fields on the master table.**

to preserve the "link" concept between accounts, in addition to the JoinedDebtorId fields being updated we are now updated the link fields on master.

LIQ-3757   **Added Garnishment, Bankruptcy, and Court Case # as quicksearch options**

Garnishment, Bankruptcy, and Court Case# added to quicksearch.

LIQ-3726   **Ordering linked account display in the workform by open accounts first, then ordering by received date.**

Added Received date to the fields being returned for accounts to the client, the ordered by them.

LIQ-3724   **Manual linking now associates debtors to align with joineddebtor relationships**

Debtors are now associated in the same fashion as they are linked when using the manual linking tool

LIQ-3723   **Manual linking now updates the "link" value on master accordingly to keep in line with the concept of "linked" accounts.**

Links are now maintained if the debtors selected in the modal are primary on the account.

LIQ-3693   **Added some improvements to the UI for displaying large numbers of linked accounts.**

In the Account Navigator Anchor some things have been added to ease viewing large numbers of linked accounts. This includes closed accounts displaying in red font, the status, and the file number being displayed in parentheses next to the customer account number.

LIQ-3692   **Linking UI improvements for Arrangements panel**

In the arrangements panel some things have been added to ease viewing large numbers of linked accounts. This includes closed accounts displaying in red font, the status, and the file number being displayed in parentheses next to the customer account number.

LIQ-3685   **Corrected an error with pagination on the Misc. Extra panel.**

The page number wasn't set to a zero index, and the pagesize was being miscalculated. This has been corrected.

LIQ-3660   **Removed single interaction per account restriction**

Multiple users can access the same account

LIQ-3627   **Balance Details current balance and balance history (for charged off and not charged off accounts) now displays balance information for all linked accounts.**

Balance Details and balance history panels were only showing the blance information for the focused account. This change adds support to toggle between viewing the focused account and the summation of all of the other accounts linked to the focused one.

LIQ-3624   **Added Medical panel to Collector**

Panel is readonly for phase I

LIQ-3599   **Implemented paging on the Misc. Extra reference panel**

Displays ten records per request/page, sorted by the Key field of Misc. Extra

LIQ-3594   **Provide full letter functionality**

The Letters panel now provides the intended functionality.

LIQ-3566   **Notes panel displays all notes for linked accounts.**

The notes panel now shows all notes for linked accounts of the currently focused one, and has a new filter to only show selected accounts' notes.

LIQ-3546   **adding required and missing cbr list data**

Added cbr specific list data

LIQ-3492   **Credit Bureau Reporting panel.**

Credit Bureau reporting panel that allows users to Extend, Report, Delete (account/codebtor), and view detail data for accounts being reported.

LIQ-3482   **CBR panel for Collector**

CB Reporting panel now available in collector. Functionality includes Extend, Report, Delete (account/codebtor), and view detail data for accounts being reported.

LIQ-3447   **New policy to toggle interest accrual**

A policy now exists in Applications\Liquid Latitude\Account Data\Scheduled Payments\Create Scheduled Payments to toggle interest accrual. This policy setting defaults to true.

LIQ-2911   **Added Complaints panel.**

Added the Complaints panel to allow users to add, modify, close, and reopen complaints for an account.

New features in release 3.0 SU 3

SCR	Description/Details

Component: Infrastructure

LIQ-2661   **Added Payment Verbiage card to the Arrangements panel.**

Added Payment Verbiage card to the Arrangements panel to display the payment method for scheduled payments.

Component: Liquid Center

LIQ-3135   **The setting for maximum number of scheduled payments is not being honored when setting up arrangements.**

003
The setting for maximum number of scheduled payments is now used when when setting up arrangements. Going beyond the limit will result in a server side exception. This is now set at the role level. The permission was moved from: the Create Scheduled Payments Policy located at 'Applications\Liquid

Latitude\Account Data\Scheduled Payments'
to: the 'User Policy' Policy located at 'Applications\Liquid Latitude\Account
Data\Scheduled Payments'.

LIQ-3011   **Added "Daily Payment Frequency" as a payment option.**

Added "Daily Payment Frequency" as a payment frequency option. Weekends and
Holidays are still skipped.

LIQ-3007   **Arrangements can now be rescheduled.**

A rescheduled arrangement will be initialized with all the prior recipe criteria, and will
replace all existing arrangements.

LIQ-2918   **Letters Functionality has been improved to now allow a more dynamic
export of mail merge fields**

Two significant changes have happened within the Letter ecosystem.

Firstly, letters are now set up through the Letter Console, and in there the user can
specify which fields should be used as part of the mail merge. Note they can also
alias the fields to align with what the letter vendor needs.

Secondly, permissions for which user can see which letter in the context of which
client have been moved in with the other permissions under a new permission called
"Allowed Letters".

LIQ-2917   **Added Income and Expenditure panel.**

Added Income and Expenditure panel to allow users to maintain a customer's income
and expenditures.

LIQ-2914   **Updated the DPA Validation dialog box.**

Updated the DPA Validation dialog box to allow users to verify that they are speaking
to the correct customer or authorized party before discussing an account.

LIQ-2912   **Added Disputes panel.**

Added the Disputes panel to allow users to add, modify, and complete debt disputes
for accounts.

LIQ-2911   **Added Complaints panel.**

Added the Complaints panel to allow users to add, modify, close, and reopen
complaints for an account.

LIQ-2876   **Arrangements can now be rescheduled.**

A rescheduled arrangement will be initialized with all the prior recipe criteria, and will
replace all existing arrangements.

LIQ-2871   **Create holds for other parties on an account when sole responsibility is
established.**

When a party requests and is granted sole responsibility on a joint account, the
system suspends collection activity for that account for all other parties on the
account.

LIQ-2838   **Displaying payment batch details.**

System now displays details for a completed payment batch.

The setting for maximum number of scheduled payments is not being

LIQ-2828

honored when setting up arrangements.

003

The setting for maximum number of scheduled payments is now used when when setting up arrangements. Going beyond the limit will result in a server side exception.

LIQ-2784

Limit number of phones that display in the Customer panel.

If a person has multiple phone numbers, the system limits the display in the Customer panel to one phone number of each phone number type. To view all phone number for an account, use the Phones panel.

LIQ-2764

Outstanding scheduled payments no longer process when a PIF or SIF arrangement on another customer's payment plan closes an account.

If there are multiple arrangements for multiple customers and one arrangement PIFs or SIFs the account, the system doesn't process any future payments.

LIQ-2763

Accounts with more than one responsible debtor (aka joint accounts) may have a single debtor request sole responsibility for the account. Sole responsibility is only granted after all other responsible debtors on the account have approved this change.

Accounts with more than one responsible debtor (aka joint accounts) may have a single debtor request sole responsibility for the account. Sole responsibility is only granted after all other responsible debtors on the account have approved this change.

LIQ-2761

Added functionality to ensure that accounts are paid in full (PIF) and settled in full (SIF) appropriately for a SIF arrangement that covers multiple accounts.

If a SIF arrangement covers multiple accounts and there's still a balance on one or more of the accounts after processing the payment, flag those accounts as SIF or PIF.

LIQ-2759

Alter permission and add logic to support payment spread options.

Ensures that scheduled payments pay accounts down correctly by chosen linked account payment spread set in administration.

LIQ-2751

Processing payments through AIM takes a very long time. The endpoint for transactions in collector needs to be modified to allow AIM to send transactions in batches.

AIM can use a new endpoint in Collector that allows for the processing of transactions to be performed in batch. This should help with performance issues.

LIQ-2747

Display the Notes panel as the default reference panel when your organization doesn't specify one.

If your organization doesn't specify the default reference panel, the system designates the Notes panel as the default.

LIQ-2698

Processing payments through Exchange takes a very long time. The endpoint for transactions in collector needs to be modified to allow Exchange to send transactions in batches.

Exchange can use a new endpoint in Collector that allows for the processing of transactions to be performed in batch. This should help with performance issues.

LIQ-2677

Added ability to redact notes.

Users can now redact (obscure) all or a portion of note comments. The system redacts the note in the Notes, Events, and Interactions panels.

LIQ-2511   **Added functionality to hold remaining payments in Batch Processor when a credit card or ACH payment is declined during batch operations.**

When a payment is declined during payment batch processing, the payment now shows as "on hold" in the Work Form.

LIQ-2044   **Add arrangement events to Interactions and Events panels.**

Added the following events to the Interactions and Events panels:

- Arrangement Scheduled - Stores details of the arrangement in summary form and all properties.
- Arrangement Canceled - Annotates the account that an arrangement was deleted.
- Arrangement Held - Annotates the account for each arrangement that was placed on hold.
- Arrangement Resumed - Annotates the account for each arrangement that was released from hold.

Component: Liquid Portal

LIQ-2891   **Added size constraint on letter images.**

Images embedded in a letter template cannot exceed the size limit of 100 KB.

LIQ-2873   **Currently the configuration for batching for financial transactions was contained in the config file**

The configuration for batching for financial transactions is now configured at the individual agency level.

LIQ-2863   **In AIM Receiver the processing of financial transactions can take a long time.**

The processing of financial transactions in AIM Receiver can now be batched. This helps with performance.

LIQ-2654   **Added ability to view assembly version information.**

On the Interaction Collector Portal page, added a link to the Version number in the application status bar to display assembly versions for each component on the web server. This information is useful for troubleshooting deployments.

LIQ-2354   **Whenever a web application has pending web requests a progress bar will appear giving the user a visual indication that the application is waiting for the server to respond.**

Whenever a web application has pending web requests a progress bar will appear giving the user a visual indication that the application is waiting for the server to respond.

LIQ-2325   **Add support for Windows Authentication over the Intranet.**

Windows authentication is now supported without the use of ADFS for scenarios when the web server and user's machines are on the same domain.

New features in release 3.0 SU 2
SCR	Description/Details

Component: Infrastructure

LIQ-1547 — **Added five fields and increased the length of two fields.**

Added country and county for some database entities. Added ID1, ID2, and PURN for debtors. Increased Street1 and Street2 to 128 characters.

Component: Liquid Center

LIQ-2511 — **Added functionality to hold remaining payments in Batch Processor when a credit card or ACH payment is declined during batch operations.**

When a payment is declined during payment batch processing, the payment now shows as "on hold" in the Work Form.

LIQ-2221 — **You can select holidays in the calendar tool when editing scheduled payments or creating a new scheduled payment.**

Grayed out holiday dates in the calendar tool so that users cannot select them.

LIQ-2195 — **Do not account for currently scheduled payments when showing the minimum settlement value.**

In the Arrangements panel, during a SIF negotiation, the Minimum Settlement value was based on the current calculated Minimum SIF value MINUS the total scheduled payments. Now if there are ANY scheduled payments, the system hides SIF negotiation capabilities so the Minimum SIF value doesn't take into account any scheduled payments and always shows the calculated Minimum SIF value.

LIQ-2188 — **Show progress indicator while proposing and saving arrangements; and gray out the Propose and Save buttons during operation.**

Added a progress indicator during Propose and Save operations. Grayed out the Propose and Save buttons during these operations to prevent resubmittals. Resubmittals were prevented before, but not visibly to users.

LIQ-2183 — **Don't allow SIF when proposing an arrangement in manual mode.**

If a user is in manual mode, the system hides the SIF check box. If a user is in SIF mode or SIF count mode and tries to change to manual mode, the system clears the SIF check box. The user cannot manually override the amounts and number of payments at the same time when proposing a SIF arrangement.

LIQ-2173 — **Direct Debit payments are mixed with normal payments.**

If an account has normal payments mixed with a Direct Debit, the Delete All button deletes all payments and then deletes the plan.

LIQ-2113 — **Allow maintenance of an organization's information and settings in Interaction Collector.**

Added system configuration functionality to Interaction Collector.

LIQ-2047 — **Need ability to add and remove holds on all scheduled arrangements.**

Added "Hold All" and "Unhold All" buttons so that users can place and release holds on all scheduled arrangements.

LIQ-2044 — **Add arrangement events to Interactions and Events panels.**

Added the following events to the Interactions and Events panels:

- Arrangement Scheduled - Stores details of the arrangement in summary form and all properties.
- Arrangement Canceled - Annotates the account that an arrangement was deleted.
- Arrangement Held - Annotates the account for each arrangement that was placed on hold.
- Arrangement Resumed - Annotates the account for each arrangement that was released from hold.

LIQ-2036   **Need ability to override settlement arrangements.**

Added "% Below Minimum" policy to the User Policy for scheduled payments so that users can override SIF arrangement.

If a user proposes an arrangement with a SIF amount below the default settlement amount (usually Blanket SIF), the system places the SIF on hold in an unapproved state unless the minimum SIF amount is within the additional allowed %. If so, the system prompts the user to approve or deny the override. If it is not within the additional allowed %, a user that has the additional percent must log on and approve or deny the SIF.

LIQ-2031   **Need to save the SIF % for future arrangements history.**

System now saves the SIF % for future arrangements history.

LIQ-2025   **Need to show the total balance of scheduled payments.**

The total of all scheduled payments appears next to "Scheduled Payments" in the Scheduled Payments card.

LIQ-1992   **Need to support moving a Direct Debit arrangement to another application, such as Care and Financial Hardship (CFH).**

Added functionality to support moving a Direct Debit arrangement transparently to a different application (e.g., for CFH changes).

LIQ-1989   **Need ability to place and release arrangement holds.**

Users can now place arrangements on hold, and release the holds.

LIQ-1967   **Added options to the Arrangements toolbar.**

10290 - closed
Added the following behaviors to the I&E button:
- If I&E data exists for the account, the monthly disposable income displays.
- If I&E data doesn't exist for the account, a dialog box opens to allow the user to add a monthly disposable income account, or bypass the process.

NPV button opens a dialog box to display the total of the NPV values.

PF&F button opens a dialog box to allow the user to specify a value greater than the NPV amount but less than the total owed.

Re-Presentment button displays the re-presentment rules.

LIQ-1926   **Set the minimum settlement value default to the customer's blanket SIF value.**

The minimum settlement value now defaults to the customer's blanket SIF value.

LIQ-1910   **TC_415_005**
Direct Debit option is not available as a payment method when creating arrangements.

10906
Add Direct Debit to the Accepted Payment Type list box In the Create Scheduled Payments permission. If it's selected, the system includes it in the Method list box on the Arrangements panel. If it's not selected, the system doesn't include it in the Methods list box.

LIQ-1894   **International phone numbers aren't formatted properly.**

The system attempts to parse phone numbers into the same country code as the current locale. If they match, it uses the national format. If they do not match, it uses the international format. If there was an error while parsing, it displays whatever is in the database.

LIQ-1814   **Modify SIF arrangements functionality.**

Determine the settlement value for each account in the arrangement.
If the user selects the Is Settlement check box, the system hides the Total and Negotiated boxes and displays the Minimum SIF % and Minimum SIF Amount boxes. The user can specify a percent or an amount, and the system adjusts the other box accordingly.

LIQ-1791   **Need ability to process and post a payment immediately.**

Clicking Process in the Scheduled Payments card in the Arrangements panel for a payment that is due today bypasses the PVG Batch Processor and posts the payment directly to the account.

LIQ-1788   **Need a visual indicator of the progress and result when attempting to save information.**

The system now uses color backgrounds to indicate to the user whether an operation is pending, completed successfully, or completed unsuccessfully. The color indicators are:

Gray = User has not requested a "save" action.
Blue = System is processing the "save" action.
Green = "Save" action completed without errors.
Red = There was an error completing the "Save" action.

LIQ-1742   **Need ability to generate and assign API keys to users to allow them to use the Interaction Collector Web Service without obtaining a token (user name and password) the normal way.**

Added API Key Manager to the Administration tool. The API Key Manager panel displays the keys used to access the API remotely. You generate a key and assign it to a user. When logging on using an API key, the system logs all activity under the user name to whom you assigned the key is assigned. You can also revoke assigned keys.

LIQ-1724   **Need ability to create Anchor cards and associate them to Anchors.**

Added the ability to create Anchor cards using the Administration tool. Also added the ability to specify the Anchors on which you want the Anchor cards to display.

LIQ-1716   **Don't list expired credit cards in a customer's wallet.**

If a credit card is expired, the system doesn't display it in the customer's wallet.

LIQ-1707   **Need ability to delete payment instruments from a customer's wallet.**

The system now allows users to delete payment instruments from a customer's wallet.

LIQ-1703   **Need to require users to confirm when deleting all arrangements.**

The system displays a confirmation dialog box when a user chooses to delete all arrangements.

LIQ-1666   **Enhance status codes in the Administration tool.**

The system displays status codes in alphabetical order and displays the column headings when a user adds or modifies a status code.

LIQ-1619   **Enhance Fee Schedule strategy.**

When processing a payment for an account, the system determines Fee Schedules using the following logic-

The system determines the customer code on the account and then checks the Payment Method Fee Schedule permission.

If the system finds a match, the system uses that Fee Schedule.

If the system doesn't find a match, the system checks the account override for the Fee Schedule. If the override exists, the system uses it. If the override doesn't exist, the system uses the default fee schedule for the customer code.

LIQ-1618   **Need ability to specify whether to display credit card numbers when adding credit cards, and specify whether to require dual entry of the number for validation.**

Added two policies to the Credit Cards permission. One policy allows you to specify whether to display periods as a user is typing the credit card number. The other policy allows you to specify whether you require users to type the credit card number twice for validation purposes.

LIQ-1617   **Need ability to start and stop interest using the Work Form and Workflow activities.**

Added the Interest menu option to allow users to start or stop client-level interest for an account. Also added the Start/Stop Interest activity to the Workflow program.

LIQ-1616   **Need the ability to place and remove manual holds on a customer or account.**

Added Holds functionality to allow users to place collection holds at the account level or customer level to suspend outbound collection activity for a specified number of days. Holds do not prevent inbound activity.

LIQ-1613   **Need ability to set the culture code for a client.**

Added Culture Code to the Client dialog box.

LIQ-1606   **Enhance PF&F button functionality in the Arrangements panel.**

Added the following behaviors to the PF&F button:
If there are no SIF arrangements on the account, the button is available.
If there is a SIF arrangement on the account, the button is grayed out.
If there isn't an arrangement on the account, the button is grayed out.
If the button is available, the user can click it to display a dialog box.
If there isn't a current PF&F offer on the accounts selected, the system displays the sum of NPV values for all accounts selected and allows the user to specify a "Pay this much By Date".
If there is a current in play PF&F offer, the system displays this information and doesn't provide the user with any options.
When enough money posts to the accounts in play to satisfy the PF&F, the system settles (SIF) the accounts.

If the due date arrives and not enough money was posted to the accounts to satisfy the PF&F, the system does nothing.

LIQ-1605 **Enhance NPV button functionality in the Arrangements panel.**

Added the following behaviors to the PF&F button:
User can click the NPV button to display a dialog box.
For each account selected in the Arrangements panel, the system displays the Account ID and the corresponding NPV value.
If there are no records for a selected account, the NPV value is blank to let the user know it doesn't exist.

LIQ-1603 **Add I&E functionality to Arrangements panel.**

User can click the I&E button to display a dialog box.
Display error message and don't allow users to propose an arrangement when I&E is needed. Display a shortcut button in the Error panel to open the I&E reference panel.

LIQ-1599 **Need the ability to process credit card and ACH payments from the Arrangements panel that are due on the current date.**

User proposes an ACH or CC payment arrangement.
First payment is due today.
User saves the arrangement.
The system changes the state to Scheduled and displays the Process button.
User processes the payment.
If successful, the system posts the payment to the account and updates the balance.
If unsuccessful, the system places the remaining payments on hold.

LIQ-1567 **Need the ability to delete all scheduled payments in an arrangement.**

Users can now delete all scheduled payments at once with the "Delete All" button.
When you click Edit Mode in the Scheduled Payments card of the Arrangements panel, a "Delete All" button appears to allow a user to delete all arrangements. Click Save to finalize the delete all, or cancel to abort.
Note: When users create proposed payments, they can click the "Delete All" button outside of Edit Mode to reset the "proposed payments".

LIQ-1510 **Need to modify QEM panel.**

In grid, By is the Requested By value
Removed Details button and now display details in the right half of the panel.
In grid, Last is ModifiedWhen value
Changed the 4 state check boxes to radio buttons.
When requesting a specific document, users have the ability to define a "needed by" date and enter a comment related to the request that will be visible to the QEM team. Entry of either date or comment is not required.

LIQ-1506 **Need ability to view and add income and expenditure information.**

Created the Income and Expenditure reference panel.

LIQ-1504 **Need a custom Letter panel for Capquest.**

Users can select a delivery method. It defaults to the preferred method of contact.
Users can generate a standard letter request.
Users can request communication on demand through the ECMS API.
Users can launch their editor using ECMS API to create an ad hoc letter.

LIQ-1433 **Add ListData functionality to Liquid**

Add ListData functionality to Liquid.

LIQ-1401	**Arrangements Panel**
	Arrangements Panel has been added to allow arrangement entry form Liquid.
LIQ-1373	
LIQ-1367	**Customers will be linked together via the new DebtorMaster relationship. A relationship identifier can be provided by the client or derived by the link evaluation.**
	Account Linking functionality remains the same.
LIQ-1298	**Need International currency symbols.**
	Added support for International currency symbols.
LIQ-1258	**Add support for miscellaneous holds.**
	Added support for: Accounts on Hold. Phone Numbers on Hold. Interest Start/Stop. Interest Pause/Resume - Delay Interest Accrual based on the condition of an account.
LIQ-1028	**Debtors will be linked together via the new DebtorMaster relationship. A relationship identifier can be provided by the client or derived by the link evaluation.**
	Account Linking functionality remains the same.

Component: Liquid Portal

LIQ-2354	**Whenever a web application has pending web requests a progress bar will appear giving the user a visual indication that the application is waiting for the server to respond.**
	Whenever a web application has pending web requests a progress bar will appear giving the user a visual indication that the application is waiting for the server to respond.
LIQ-2325	**Add support for Windows Authentication over the Intranet.**
	Windows authentication is now supported without the use of ADFS for scenarios when the web server and user's machines are on the same domain.
LIQ-2078	**Need ability to add fee schedules.**
	Fee schedule functionality is now available in the Administration tool under System Codes and Settings.
LIQ-1740	**Need to add codes to System Codes and Settings.**
	Added the following to the Administration tool under System Codes and Settings: Law Lists Legal Ledger Types Payment Sub-Batch Types Salesman Codes Surcharge Types
LIQ-1737	**Need ability to modify and delete fee schedules.**

Added modify and delete functionality to fee schedules in the Administration tool under System Codes and Settings.

LIQ-1736 **Need ability to add and modify clients in Interaction Collector. Functionality exists currently in Interaction Collector Console.**

Added the ability to add and modify clients to the Administration tool under System Codes and Settings.

LIQ-1610 **Need to support Direct Debit scheduled payments in the PVG Batch Processor.**

Added the ability to choose to process Direct Debit scheduled payments in the PVG Batch Processor. These payments post to the account and aren't sent to an external vendor for processing.

LIQ-1473 **Need to ability to view Client Guidelines.**

Created the Client Guidelines panel to display the client's work plan, settlement guidelines, and miscellaneous information.

LIQ-1368 **Integrate with error reporting service**

All unhandled server errors are reported to a public-facing secured web service to allow proactive troubleshooting.

LIQ-1176 **Need ability to specify which Task panels are available to users.**

Added Task Panels permission to the Administration tool to specify the default Task panel and the available Task panels.

LIQ-1015 **Need ability for Developers to use an API to query for process and stage transition history.**

Developers can now get the process and stage transition history for a particular account, a particular person, or a particular instance of a process from the API.

LIQ-1013 **Need the ability for Developers to use an API to cause a stage transition.**

Developers can now use an API to transition an account to another stage.

LIQ-1012 **Need the ability for Developers to start a process using an API.**

Developers can now use an API to start a process.

New features in release 3.0 SU 1

SCR	Description/Details

Component: Liquid Center

LIQ-1266 **Rebranding to Interaction Collector.**

Change all needed items to reflect the Interaction Collector product line.

LIQ-852 **Cycle date calculations are no longer computed and instead come from the bridge**

Cycle date calculations are no longer computed and instead come from the bridge

LIQ-837 **Add file compression to documentation panel.**

When a file is attached with the documentation panel, the file will automatically be

compressed before it is stored in the server database.

LIQ-835   **Additional tracing around HTTP requests and WebAPI endpoints**
Added tracing around HTTP requests that can include up to the full request and response body at All verbosity. Added exception tracing and timing around WebAPI endpoints.

LIQ-672   **The UI now supports showing codebtor data**
In the task accordion any codebtor associated with an account can be selected and their data can be viewed.

LIQ-652   **This panel displays information on payment history pulled from a table populated by ADT.**

LIQ-651   **Ability for agents to view Billing Info data in a Reference Panel**
Ability for agents to view Billing Info data in a Reference Panel

LIQ-491   **Delinquency anchor statistics.**
Statistics are now included in the delinquency anchor.

LIQ-490

LIQ-435

LIQ-403

LIQ-402

LIQ-393   **The user will be presented a pop up form for the placement settings**
The user will be presented a pop up form for the placement settings

LIQ-356   **This panel should show Delinquency bucket history and Current Balance .**
This panel should show Delinquency bucket history and Current Balance .

LIQ-355

LIQ-354

LIQ-353

LIQ-352   **Standard Recovery Anchor**
a standard Latitude Recovery anchor to be available in permissions/policies so users can associate certain customer codes with this anchor. All cells need to be available.

LIQ-351

LIQ-345

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LIQ-304 **Create a Reminder**
Create a Reminder

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LIQ-300 **Extra Data Panel**
Extra Data Panel allowing users to create/edit/delete Extra Data. Extra Data Panel
allows customers to store data that does not conform to existing fields.

LIQ-299 **Misc Extra Panel**
Misc Extra Panel allows users to create data elements in name, value pairs (Title and
Data). This enables the user to create a field for data on the fly with no
configuration.

LIQ-298 **Create a reference 'Phones' Panel.**
Create a reference 'Phones' Panel.

LIQ-297 **Create a reference 'Notes' Panel.**
Create a reference 'Notes' Panel.

LIQ-291

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LIQ-276

LIQ-252

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LIQ-245

LIQ-241

LIQ-232 **Added Delinquency Anchor**

This will be a standard shipped anchor for our customers to use for Delinquent Accounts

LIQ-231

LIQ-226

LIQ-223

LIQ-220

LIQ-218

LIQ-170 **Create 'Contact Information' panel**
Create 'Contact Information' panel

LIQ-164

LIQ-152 **Create 'Assets' panel**
Create 'Assets' panel

LIQ-145

LIQ-144 **Create 'Major Dates' panel**
Create 'Major Dates' panel

LIQ-143

LIQ-142 **Create 'CCCS' panel**
Create 'CCCS' panel

LIQ-141 **Create 'Deceased Information' panel**
Create 'Deceased Information' panel

LIQ-140 **Create 'Bankruptcy information'**
Create 'Bankruptcy information'

LIQ-139 **Create 'Attorney Information panel**
Create 'Attorney Information panel

LIQ-137 **Create 'Spouse Information' panel**
Create 'Spouse Information' panel

LIQ-121

Component: Liquid Install

LIQ-452

Component: Liquid Portal

LIQ-946 **Initial external login (federated authentication) support introduced through the WS-Federation protocol.**

LIQ-871 **Improved batch coherency, support for Paper Draft.**

LIQ-870 **New user interface for PVG Batch Manager**
Improved batch coherency, support for Paper Draft.

LIQ-818 **Added declarative timeout configuration for WebAPI endpoints**
Added a WebAPI action filter which respects the ASP.NET MVC AsyncTimeout attribute. Using it to set a CancellationToken passed to async actions that will cancel after the specified duration.

LIQ-817 **Added extension methods to get dynamic data records from DbDataReader.**
Added extension methods to get dynamic data records from DbDataReader.

LIQ-816 **Added UltraVerbose trace level for trace logging.**
Added UltraVerbose trace level for very verbose diagnostics messages, particularly those that may include large amounts of dynamic data and could quickly fill the log files.

LIQ-770 **Legal case court tab added.**
A court tab has been added to the Legal Case Task.

LIQ-694 **General tab added to Legal Case Task**
A general tab has been added to the Legal Case task.

LIQ-567 **Interactions can be filtered by user or method**
Interactions can be filtered by user or method

LIQ-565 **User can now see event details in an event reference panel, similar to notes.**
There is now a reference panel called Events that will show all individual event details regardless of interaction, similar to notes.

LIQ-564 **Events in the Events panel are sortable by User, Date/Time or Event name**
Events in the Events panel are sortable by User, Date/Time or Event name

LIQ-563 **Events in the Events panel are filterable by one or many event names.**
Events in the Events panel are filterable by one or many event names.

LIQ-562 **There is now an event panel that can display all events on an account.**
There is now an event panel that can display all events on an account.

LIQ-560 **If user has permission, an attached document can be deleted (removed) from an account.**
If user has permission, an attached document can be deleted (removed) from an account.

LIQ-557   **If user has permission, list of documents attached to an account can be viewed.**

If user has permission, list of documents attached to an account can be viewed.

LIQ-556   **Charged Off Transaction History panel details view added.**

Allows the user to drill into a record and view further details on the transaction.

LIQ-555   **Charged Off Transaction History panel added.**

Read-only panel that can view all transactions at a high level and allow the user to drill into a record and view further details on the transaction.

LIQ-550   **Pre-existing labels can be added to accounts.**

When a new label is added to an account, it is then stored and available to be added to other accounts.

LIQ-549   **Labels are being added as functionality.**

Users can create new labels and add them to accounts.

LIQ-461   **A new field has been added that gives the user the ability to configure how many batches are sent in a transaction.**

A new field has been added that gives the user the ability to configure how many batches are sent in a transaction.

LIQ-443

LIQ-406

LIQ-405   **Scheduled Payment Batch Web Page**

Add functionality to enable Scheduled Payment Batch Web Page.

LIQ-401

LIQ-400

LIQ-397   **Reference Panel for all AIM Data**

Reference Panel for all AIM Data

LIQ-389   **Respect Consent for Click and Dial**

If the phone number explicitly has denied consent to dial the number, do not allow Click and Dial

LIQ-381

LIQ-365

LIQ-349

LIQ-333

LIQ-330

LIQ-319

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LIQ-286

LIQ-284

LIQ-258

LIQ-257

LIQ-240

New features in release 3.0

SCR	Description/Details

Component: Liquid Center

LIQ-1967   **Added options to the Arrangements toolbar.**

10290 - closed
Added the following behaviors to the I&E button:
- If I&E data exists for the account, the monthly disposable income displays.
- If I&E data doesn't exist for the account, a dialog box opens to allow the user to add a monthly disposable income account, or bypass the process.

NPV button opens a dialog box to display the total of the NPV values.

PF&F button opens a dialog box to allow the user to specify a value greater than the NPV amount but less than the total owed.

Re-Presentment button displays the re-presentment rules.

LIQ-1619   **Enhance Fee Schedule strategy.**

When processing a payment for an account, the system determines Fee Schedules using the following logic-

The system determines the customer code on the account and then checks the Payment Method Fee Schedule permission.

If the system finds a match, the system uses that Fee Schedule.

If the system doesn't find a match, the system checks the account override for the Fee Schedule. If the override exists, the system uses it. If the override doesn't exist, the system uses the default fee schedule for the customer code.

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LIQ-1510   **Need to modify QEM panel.**

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