[°]GENESYS[™]

AIM Receiver Manager

Printable Help

Version 13.0

Last updated November 05, 2019

Abstract

This document is a printable version of AIM Receiver Manager help.

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Introduction to AIM Receiver Manager

AIM Receiver Manager allows you to transfer information between AIM (Agency/Attorney Interface Manager) clients and outside collection agencies and attorneys. It exports and imports data using XML file layouts that are proprietary to AIM.

Log on to AIM Receiver Manager

Use the Latitude Logon dialog box to log on to AIM Receiver Manager.

To log on to AIM Receiver Manager

- 1. Do one of the following:
 - On your desktop, click the shortcut to AIM Receiver Manager.
 - Click Start > All Programs > Interactive Intelligence > Interaction Collector > Agency Interface Manager > AIM Receiver.

The Latitude Logon dialog box appears.

🧏 Latitude Login		×
User Name:		A Real
Password:		
Database:	Default Instance	-
🕅 Log in using Wi	ndows authentication	TI-TIME
Cancel	L. (39	Qkay

Note: Premises-based clients can use Windows authentication to bind Latitude users to their Windows identity to permit logging on to Latitude automatically. Windows authentication is not available for hosted clients. To log on using Windows authentication, select the **Log in using Windows authentication** check box and provide your Windows user name and password.

- 2. In the **User Name** box, type your Latitude user name.
- 3. In the **Password** box, type your Latitude password. As you type your password, periods display instead of the typed characters.
- 4. Click Okay. The AIM Receiver Manager window appears.

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	<u>F</u> ile	<u>A</u> ctions	<u>R</u> eports <u>I</u>	<u>l</u> elp					
	Drag	a column head	ler here to gro	up by that column					
		Name	Σ⊽⇔	Description	Σ⊽⇔	AlphaCode	Σ⊽⇔	AgencyID	Σ⊽≉
L									
	Add	Receiver	lients						

Overview of AIM Receiver Manager Window

The **AIM Receiver Manager** window is the main window in AIM Receiver Manager. It allows you to specify settings for an outside collection agency or attorney, import data received from the customer, and export data to the customer.

😢 AIM	Receiver Ma	anager					- 0	x
<u>Ejle</u>	Actions	<u>R</u> eports <u>H</u>	<u>l</u> elp	1				
Drag a	column head	er here to gro	up by that column.	2				
	Name	Σ⊽⇔	Description	Σ⊽⇔	AlphaCode	Σ⊽⇔	AgencyID	Σ⊽⇔
				3				
Add	Receiver	lients		4				

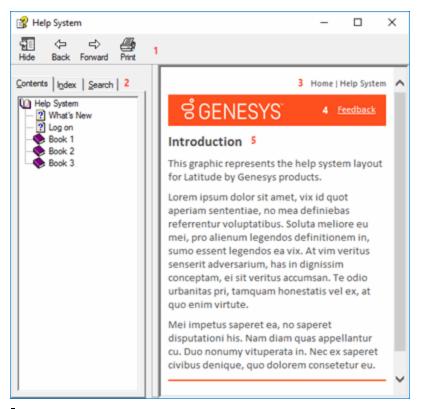
- 1. Menu bar: Displays options for the application.
- 2. Grouping bar: Allows you to drag and drop column headings into the space to group data.
- 3. Content pane: Displays the AIM Receiver clients.
- 4. **Command bar:** Displays options for adding or displaying information.

Help Overview

AIM Receiver Manager help provides you with information for using AIM Receiver Manager. To locate and view a topic, use the table of contents, index, and search features.

To open help

In menu bar, click **Help** and then click **Help on AIM Receiver Manager**. The **AIM Receiver Manager Help** window appears.



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

- 1. **Toolbar:** Allows you to hide or show the tabs and **Navigation** pane, move forward and backward through topics, and print the currently displayed topic.
- 2. Tabs: Displays the following:
 - **Contents:** Displays the table of contents. To display a topic in the **Content** pane, expand a book and then click the link.
 - Index: Displays the index. To display a topic in the **Content** pane, type a keyword or phrase in the box (or scroll through the list) and then click the link in the list.
 - **Search:** Displays the <u>search feature</u>. To display a topic in the **Content** pane, type a keyword or phrase in the box and then press **Enter**. In the search results, click the link.
 - **Glossary:** If available, displays a list of terms and their definitions. To display a definition, click the term.
- 3. **Breadcrumbs:** Displays your current location within the help system. When you click a breadcrumb, the related topic displays.
- 4. **Content toolbar:** Displays an option to send feedback through an email message to Latitude by Genesys Documentation.
- 5. **Content pane:** Displays the contents of a topic. To view the **Content** pane menu, right-click in the **Content** pane.

Search feature

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

Search syntax

The basic rules for formulating search queries are:

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

Wildcard expressions

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

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

Boolean operators

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

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

Nested expressions

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

Client Configuration

Client Configuration

Use the **Client Configuration** window to add clients who outsource accounts to your organization, and configure the client settings. You can also import and export data for a single client. For more information, see <u>Import Files</u> and <u>Export Files</u>.

Add a Client

Use the **Client Configuration** window to add a client. Once you add a client, you can configure the client's settings.

To add a client

1. In the lower section of the **AIM Receiver Manager** window, click **ReceiverClients**. AIM Receiver Manager adds a blank row to the data grid.

💋 AIN	A Receiver	r Manager						x
Eile	Action	s <u>R</u> epo	orts <u>H</u> elp					
Drag	a column h	eader here	to group by th	at colum	n.			
	lame		Description	Σγ÷	AlphaCode △	Σ⊽≁	AgencyID	Σ⊽⇔
Su	mmer Collec	tion Agen						_
Add	Receiv	verClients						

2. In the Name column of the data grid, click the Client icon. The **Client Configuration** window appears.

			Client Configuratio	n			×
Client Name		_	My Agency Id 0	AIM Client Vers	ion 8.2.*		
Using Alp	pha Code In File Names		My Alpha Code				
19	History		Status and Notes (ASTS)	r		Payments	
		8	Close Statuses	10		Process	
	General	1	Placement			Pending Recall	v v
Description							
-							
Contact Name							
Phone							
Email							
Address							
Last Received			Last Sent				
Placement		v	Recall Objection	~	Complaint		¥
Pending Recall			Payment	~	Dispute		
Pending Recall Final Recall		> > >	Payment Demographic	> >	Dispute		v
					Dispute		
Final Recall			Demographic	¥	Dispute		
Final Recall Payment		¥	Demographic Close	×	Dispute		
Final Recall Payment Demographic		~ ~ ~ ~ ~	Demographic Close Bankruptcy	> > >	Dispute		
Final Recall Payment Demographic Notes		~ ~ ~	Demographic Close Bankruptcy Deceased	> > > >	Dispute		
Final Recall Payment Demographic Notes Misc Extra Data		~ ~ ~ ~ ~	Demographic Close Bankruptcy Deceased Reconciliation	> > > > > > > > > > > > > > > > > > >	Dispute		
Final Recall Payment Demographic Notes Misc Extra Data Equipment			Demographic Close Bankruptcy Decessed Reconciliation Request/Response	> > > > >	Dispute		
Final Recall Payment Demographic Notes Misc Extra Data Equipment Request/Response			Demographic Close Bankruptcy Deceased Reconciliation Request/Response. Acknowledgment	> > > > > > > > >	Dispute		
Final Recall Payment Demographic Notes Misc Extra Data Equipment Request/Response Judgment			Demographic Close Bankruptcy Deceased Reconciliation Request/Response Acknowledgment Asset	> > > > > > > > > > > > > > > > > > >	Dispute		
Final Recall Payment Demographic Notes Misc Extra Data Equipment Request/Response Judgment Deceased Bankruptcy			Demographic Close Bankruptcy Deceased Reconciliation Request/Response. Acknowledgment Asset Judgment	9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9	Dispute		
Final Recall Payment Demographic Notes Misc Extra Data Equipment Request/Response Judgment Deceased			Demographic Close	>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>	Dispute		

Client Name: Name of the client who is outsourcing accounts to your organization.

My Agency ID: Unique numeric code that the client assigned to your organization for identification purposes.

AIM Client Version: The version of AIM that your client uses.

Using Alpha Code in File Names: If selected, AIM Receiver Manager includes the value in My Alpha Code when naming the import and export files.

My Alpha Code: Unique alphanumeric code that the client assigned to your organization. The client uses this code to label the folders that contain your import and export files.

- 3. In the upper section of the window, complete the information and then click Apply.
- 4. Proceed to configure the client.
- 5. After you configure the client, click **Save**. AIM Receiver Manager adds the client to the data grid in the **AIM Receiver Manager** window.

Configure General Client Settings

Use the General tab in the Client Configuration window to configure general settings for a client.

To configure general client settings

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

8	History	X	Status and Notes (ASTS)	- X-	Payments
	Final Recall	10	Close Statuses	6	Process
	General		Placement		Pending Recall
Description					
Contact Name					
Phone					
Email					
Address					
Last Received			Last Sent		
Placement		v	Recall Objection	~	Complaint
Pending Recall		V	Payment	~	Dispute
Final Recall		V	Demographic	~	
Payment		v	Close	~	
Demographic		v	Bankruptcy	¥	
Notes		~	Deceased	~	
Misc Extra Data		v	Reconciliation	~	
Equipment		~	Request/Response	~	
Request/Response		~	Acknowledgment	~	
Judgment		¥	Asset	~	
Deceased		~	Judgment	~	
Bankruptcy		~	Status/Notes	~	
Complaint		~	Activity Notes	~	
Dispute		~	Work Efforts	v	

Description: Description of the client.

Contact Name: Name of the contact person at the client's organization.

Phone: Contact person's phone number.

Email: Contact person's email address.

Address: Contact person's mailing address.

Last Received: This section displays the dates that you last received the type of data from the client. The system populates this information when you import data from a file.

Last Sent: This section displays the dates that you last sent the type of data to the client. The system populates this information when you export data to a file.

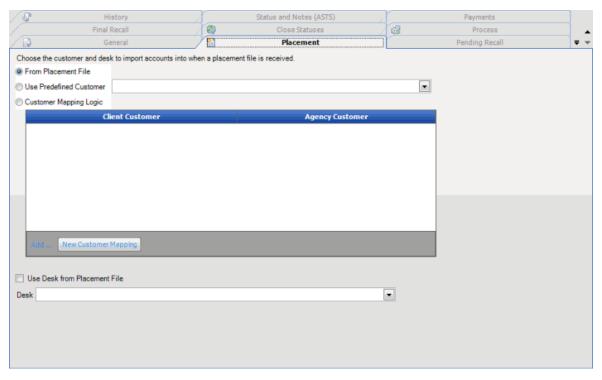
2. In the upper section of the tab, complete the information and then click **Apply**.

Configure Account Placements

Use the **Placement** tab in the **Client Configuration** window to configure account placement settings for a client. You can specify which customer and desk to assign to accounts that a client places with your organization.

To configure account placement settings

- 1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
- 2. Click the Placement tab.



Use Desk from Placement File: If selected, the import file contains the desk to assign to accounts.

Desk: Desk to assign to accounts.

- 3. Do one of the following:
 - If the import file contains the customer to assign to accounts, click From Placement File.
 - To specify the customer to assign to accounts, click **Use Predefined Customer** and then, in the list box, click the customer.

- If the import file contains customer codes that you can map to existing customers, click **Customer Mapping Logic** and then do the following:
 - a. Click **New Customer Mapping**. AIM Receiver Manager adds a blank row to the data grid.
 - b. In the Client Customer column of the data grid, type the code included in the file that identifies the client.
 - c. In the Agency Customer column of the data grid, type the code for the existing customer to map to the client customer code.
- 4. Do one of the following:
 - If the import file contains the desk to assign to accounts, click Use Desk from Placement File.
 - If the import file doesn't contain the desk to assign to accounts, in the **Desk** list box, click the desk to assign to accounts.
- 5. Complete the information and then click **Apply**.

Configure Pending Recalls

Use the **Pending Recall** tab in the **Client Configuration** window to configure pending recalls and objections for a client.

To configure pending recalls

- 1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
- 2. Click the **Pending Recall** tab.

	Final Recall		Close Statuses	Process	
	General		Placement	Pending Recall	
an account is not	being objected to change account	status to		_	
	·				
onfigure the follow	ing conditions that will trigger a re	call object	ion to be sent when a pending recall is received.		
When there are			Received a payment with this number of days.	~	
When there are	e post dated checks.				
When the account is	s one in one of the following status	es.	When the account is one in one of the following que	eues.	
ACT - ACTIVE A		*	000 - REMINDER	*	
	RTS EXHAUSTED		010 - BROKEN PROMISE 011 - NO MORE POSTDATED CHECKS		
	7 BANKRUPTCY **		1 012 - BOUNCED CHECKS		
	11 BANKRUPTCY		013 - NO MORE PROMISES		
B13 - CHAPTER	13 BANKRUPTCY **	=	015 - NEW ACCOUNTS	E	
	PTCY PENDING **		016 - NEWBIZ FOLLOWUP		
	IER CREDIT COUNSELING		018 - PDC OVER \$500		
CCR - CLOSED	CLIENT REQUEST		019 - NPC 020 - ACCOUNTS 0-30 DAYS OLD		
DEC - DEBTOR			025 - ACCOUNTS W PAYMENT		
DIP - DEBTOR I			030 - ACCOUNTS 30-60 DAYS OLD		
	DISPUTES BALANCE		060 - ACCOUNTS > 60-90 DAYS		
DUP - DUPLICA	TE ACCT IN SYSTEM		090 - ACCOUNTS 90-120 DAYS OLD		
HLD - CLIENT P	UT ON HOLD		100 - ACCOUNT REASSIGNED		
HOT - SPECIAL			120 - OVER 120 DAYS OLD		
NEW - NEW ST			200 - RETURNED WITH CREDIT REPORT		
NPC - NSF STIL	L HAS PDCS ON FILE **	*	400 - LATE NIGHT (1)	T	

[Account Status]: Status to change an account to when you aren't objecting to an account recall.

When there are promises to pay: If selected, when AIM Receiver Manager receives a pending recall request for an account with a promise-to-pay arrangement, it triggers a recall objection.

When there are post dated checks: If selected, AIM Receiver Manager receives a pending recall request for an account with post-dated check or credit card transactions, it triggers a recall objection.

Received a payment with this number of days: Number of days after AIM Receiver Manager receives a payment that it no longer triggers a recall objection. If AIM Receiver Manager receives a payment before the number of days have passed, it triggers a recall objection.

When the account is in one of the following statuses: If a check box is selected, that account status triggers a recall objection.

When the account is in one of the following queues: If a check box is selected, that work queue triggers a recall objection.

3. Complete the information and then click **Apply**.

Configure Final Recalls

Use the Final Recall tab in the Client Configuration window to configure final recalls for a client.

To configure final recalls

- 1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
- 2. Click the Final Recall tab.

▲
– – –

 In the Move to Desk list box, click the desk to move accounts to when AIM Receiver Manager receives a final recall and then click Apply.

Configure Close Status Codes

Use the **Close Statuses** tab in the **Client Configuration** window to map close status codes your organization uses to close status codes the client uses.

To configure close status codes

- 1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
 - T Status and Notes (ASTS) Payments -10 **Close Statuses** 63 Process ß Pending Recal Update the Client Status column to reflect the appropriate statuses for the client AgencyStatus ClientStatus HoldDays ACT ACT AEX AEX ATY ATY B07 B07 B11 B11 **B13 B13** BKY BKY CCC CCC CCR CCR CND CND DEC DEC DIP DIP DSP DSP DUP DUP HLD HLD HOT HOT NEW NEW NPC NPC NSE NSF PCC PCC PDC PDC PIE DIF Close Status Code
- 2. Click the Close Statuses tab.

AgencyStatus: Status codes your organization assigns to accounts.

ClientStatus: Status codes that the client uses that corresponds to your organization's status codes.

HoldDays: Number of days to hold an account assigned to the status before returning the account to the customer. This box allows you to assign different hold days than the ones

configured in Latitude. To use the hold days configured in Latitude, ensure that this box is blank. For more information, see the *Status Codes* topic.

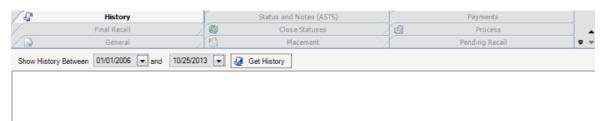
- 3. To add a close status code, click **Close Status Code**. AIM Receiver Manager adds a blank row to the data grid.
- 4. Complete the information and then click **Apply**.

View Client History

Use the History tab in the Client Configuration window to view transaction history for a client.

To view client history

- 1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
- 2. Click the **History** tab.



- 3. Specify the date range for which to view transaction history and then click **Get History**. Transactions that occurred within the specified time frame appear in the data grid.
- 4. To view detail for a transaction, in the data grid, click in the File Name box and then click the Detail icon. The **History Details** dialog box appears.

His	tory Details					
[AIM20090109154123	14.CRCL				
[Export To Excel					
Dr	ag a column header he	ere to group by that c	olumn.			
re	ecord_type Σ⊽‡	file_numbe ∑⊽+¤	account ∑⊽‡	recall_reaso	∑⊽‡ object	io
	CPEN	100321	7738158864155	WIB	1900010)1
	Recall objection sent; th	ne account has a payme	nt with the objection	n period		

- 5. To export the data to Microsoft Excel, do the following:
- a. Click **Export to Excel**. The **Save As** dialog box appears.
- b. In the **File name** box, type a name for the file and then click **Save**.

Configure Statuses and Notes

Use the **Status and Notes** tab in the **Client Configuration** window to configure action and result codes for account status and note changes.

To configure statuses and notes

- 1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
- 2. Click the Status and Notes tab.

	History		Status and Notes (ASTS)		Payments
	Final Recall		Close Statuses	🗳	Process
	General	1	Placement	X	Pending Recall
dit configu	ration for the ASTS file				
	Action	Result	Status	Notification	CustomGroupID
e Conf	figuration.				
- Cont	iguración.				

Action: Action code assigned to the account note.

Result: Result code assigned to the account note.

Status: Status code assigned to the account.

Notification: Notification queue assigned to the account.

CustomGroupID: Custom group assigned to the account.

- 3. To add a status code, click **Configuration**. AIM Receiver Manager adds a blank row to the data grid.
- 4. Complete the information and then click **Apply**.

Configure Payments

Use the **Payments** tab in the **Client Configuration** window to configure payments for a client. You can configure the system to check payment and adjustment transactions for echo-back to prevent recording duplicate transactions. Echo-back is when you send a payment file to the agency or attorney who holds the account and then receive a payment file that contains that same payment or adjustment.

To configure payments

- 1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
- 2. Click the **Payments** tab.

8	History	X	Status and Notes (ASTS)	$ \rightarrow $	[Payments
	Final Recall		Close Statuses		68	Process
	General	1	Placement			Pending Recall
Setup Configura	ation for handling of CPAY files					
	ments/Reversals for Echo h date will be used to					
C Date Ent	d					
	f selected date is on or s prior to date from file					
Send Ove	rpaid Amount?					
	ent Batching (Improves Performance) tch Size					

- 3. To check payment and adjustment transactions for echo-back, do the following:
- a. Select the **Check Payments/Reversals for Echo Back** check box.
- b. Do one of the following:
 - To compare the date in the payment file to the date you added the payment to the system, click the **Date Entered** check box.
 - To compare the date in the payment file to the payment date, click the **Date Paid** check box.
 - To compare the date in the payment file to the payment invoice date, click the **Invoiced Date** check box.

c. Type or select the maximum number of days after the date in the payment file that AIM Receiver Manager considers the transaction an echo-back.

- 4. To send an overpayment amount, select the **Send Overpaid Amount** check box and then click **Apply**.
- 5. To allow batch processing of payment transactions, do the following:
- . Select the Use Payment Batching (Improves Performance) check box.

a. In the **Batch Size** box, specify the batch size to use when processing transactions. We recommend that you use a batch size of 50-200. If you select the **Use Payment Batching (Improves Performance)** check box and don't specify a batch size, AIM Receiver defaults to a batch size of 50.

6. Click Apply.

Configure Requests and Responses

Use the **Request/Response** tab in the **Client Configuration** window to configure requests and responses for a client.

To configure requests and responses

Request/Response					
History	A.	Status and Notes (ASTS)	A.	Payments	
Final Recall		Close Statuses	G	Process	₹ •
Configure Request Codes					
Code		Description		DefaultText	
Add Request Code					
Configure Response Codes					
Configure Response Codes Code		Description		DefaultText	
		Description		DefaultText	
		Description		DefaultText	
		Description		DefaultText	
		Description		DefaultText	
		Description		DefaultText	
		Description		DefaultText	
		Description		DefaultText	
Code		Description		DefaultText	
		Description		DefaultText	
Code		Description		DefaultText	

2. Click the Request/Response tab.

Configure Request Codes

Code: Code that identifies the request.

Description: Description of the request.

DefaultText: Default text to include in the request.

Configure Response Codes

Code: Code that identifies the response.

Description: Description of the response.

DefaultText: Default text to include in the response.

- 3. To add a request code, click **Request Code**. AIM Receiver Manager adds a blank row to the data grid.
- 4. To add a response code, click **Response Code**. AIM Receiver Manager adds a blank row to the data grid.
- 5. Complete the information and then click **Apply**.

Configure Letter Work Efforts

Use the **Letter Efforts** tab on the **Work Effort** tab in the **Client Configuration** window to configure work efforts related to letters.

To configure letter work efforts

- 1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
- 2. Click the **Work Effort** tab and then click the **Letter Efforts** tab.

	Request/Response	Y	Work Effort				
13	History		s and Notes (ASTS)		Payments		
	Final Recall		Close Statuses	G	Process		= -
Letter Efforts	Note Efforts						
	LetterCode	ActionCateg	jory	ActionCode		ActionText	
							_
Add Let	tter Effort						
				[🚽 Save 🔓	🕻 Cancel 🛛 🖌	Apply

Letter Code: Code that identifies a letter in Letter Console.

Action Category: Category that your organization assigned to group the letter action.

Action Code: Code that your organization assigned to identify the letter action.

Action Text: Comment or description that your organization associated to the letter action.

- 3. To add a letter effort, click Letter Effort. AIM Receiver Manager adds a blank row to the data grid.
- 4. Complete the information and then click **Apply**.

Configure Note Work Efforts

Use the **Note Efforts** tab on the **Work Effort** tab in the **Client Configuration** window to configure work efforts related to notes. You can configure a note work effort using an action and result code together, or just one of the two.

To configure note work efforts

- 1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
- 2. Click the **Work Effort** tab and then click the **Note Efforts** tab.

	Request/Response		Work Effort			
8	History	- A -	Status and Notes (ASTS)	- X-	Payments	A
	Final Recall		Close Statuses	Ci i	Process	
Letter Efforts	Note Efforts					
Ac	tionCatego ry	ActionCode	ActionText	action	result	
Add No	te Effort					
					📙 Save 💥 Cancel	🖌 Apply

Action Category: Category that your organization assigned to group the note action.

Action Code: Code that your organization assigned to identify the note action.

Action Text: Comment or description that your organization associated to the note action.

Action: Unique code that identifies an action in Latitude.

Result: Unique code that identifies the result of an action in Latitude.

- 3. To add a note effort, click **Note Effort**. AIM Receiver Manager adds a blank row to the data grid.
- 4. Complete the information and then click **Apply**.

Import Overview

Import Overview

You have two options for importing AIM client data into AIM Receiver. The first option is to import client data from all the files in one or more client folders. The second option is to import client data for a specific client and type of data (for example, payments, recalls, notes).

Import All Files in a Folder

Use the **Batch Execution** window to import AIM client data from all the files in a folder. You can select a folder for a specific client and only import those files, or, you can select a folder at a higher level and import files for multiple clients. AIM Receiver Manager flags for removal invalid files and files that AIM Receiver Manager processed previously.

To import all files in a folder

1. In the menu bar, click Actions > Import > Import All Files From Folder. The Batch Execution window appears.

В	atch	Execution	_								
-	ø	Open Folde	r 🗟	<u>V</u> alidate Files	<u>R</u> em	ove Invalid Files	👔 Import Files	Export to Excel	📲 <u>E</u> xit		
	Drag	g a column he	ader h	ere to group by t	hat colum	•					
	(Client Name		Alpha Co	de	Client ID	File Name	File Type	Status	Progress	
F	leady	ý									

- 2. In the toolbar, click **Open Folder**. The **Browse for Folder** dialog box appears.
- 3. Click the folder for the import files and then click **OK**. The files appear in the **Batch Execution** window. The Status column indicates whether a file is ready for validation or has errors. If a file has errors, AIM Receiver Manager displays the errors in the window.

tch Execution						
💋 <u>O</u> pen Folder	🛃 <u>V</u> alidate Files 📑 <u>R</u> emov	e Invalid Files	Import Files	🗷 Export to	E <u>x</u> cel 🐗 <u>E</u> xi	it
)rag a column heade	r here to group by that column.					
Client Name	File Name	Client ID	Alpha Code	File Type	Status	Progress
Invalid	AIM20131001100222_2.CPLC.pr ocessing	0	Invalid	Invalid	Invalid File	1
The filename does no	t end with a supported extension.					,
ABC Company	AIM20131003111407_2.CRCL	6		Recall	Ready	
ABC Company	AIM20131003111456_2.CRCL	6		Recall	Ready	
ABC Company	AIM20131003155206_2.CPLC	6		Placement	Ready	
ABC Company	AIM20131003155836_2.CRCL	6		Recall	Ready	
ABC Company	AIM20131004094942_2.CAST	6		Assets	Ready	
Invalid	AIM20131004095156_2.CAST.pr	0	Invalid	Invalid	Invalid File	
ady						

4. In the toolbar, click **Validate Files**. The system verifies whether the file structure is valid. If a file is invalid, the **Processed** check box is selected.

atch Execution	1. 2								Ē
💋 <u>O</u> pen Folder	🛛 🗋 <u>V</u> alidate Files 👔	<u>R</u> emove In	validFiles 🛛 👔	Import File	s 🔣 Expo	rt to E <u>x</u> cel 📲 <u>E</u> xit			
Drag a column hea	der here to group by that	column.							
Client Name	File Name	Client ID	Alpha Code	File Type	Status	Progress	Record Coun	Processed	Ę
Invalid	AIM20131001100222_2.C	0	Invalid	Invalid	Invalid File	į	0		ſ
The filename does i	not end with a supported ext	ension.				r			١.
ABC Company	AIM20131003111407_2.C	6		Recall	Invalid)	0		ľ
File is an invalid XM	IL file.								į.
ABC Company	AIM20131003111456_2.C RCI	6		Recall	Invalid		0		
File is an invalid XM	IL file.				-				l
ABC Company	AIM20131003155206_2.C	6		Placement	Invalid		0		
File is an invalid XM	IL file.								
ABC Company	AIM20131003155836_2.C RCI	6		Recall	Invalid		0		
File is an invalid XM	IL file.								
ABC Company	AIM20131004094942_2.C AST	6		Assets	Invalid		0		
File is an invalid XM	IL file.				-				
Invalid	AIM20131004095156_2.C	0	Invalid	Invalid	Invalid File		0		
eady									

- 5. In the toolbar, click **Remove Invalid Files**. AIM Receiver Manager deletes invalid files from the data grid, and only displays the valid files. If AIM Receiver Manager imported a file previously, the **Processed** check box is selected.
- To delete files that AIM Receiver Manager processed previously to prevent duplicate processing, click the file and then press the **Delete** key. In the confirmation dialog box, click **Yes**. AIM Receiver Manager deletes the file.
- 7. In the toolbar, click Import Files. A progress bar shows that status of the import process.
- 8. When the import is complete, in the toolbar, click **Exit**.
- 9. To review any processing errors, do the steps to View Client History.
- 10. To view batch numbers for imported payments, open the **Payment Entry** window in Latitude. AIM Receiver Manager notes the exceptions for payment reversals without a matching payment.

Import Assets

Use the **Process** tab in the **Client Configuration** window to import debtor assets that the client added or updated after placing the accounts with your organization.

To import assets

			Client Co	onfiguration						×
Client Name			My Agency Id	0 ÷	AIM Client	Version	8.2.*	•		
🗂 Usin	ng Alpha Code In File Names		My Alpha Code							
18	History		Status and I	Notes (ASTS)				Payments		
	Final Recall			Statuses		3		Process		-
	General		Pla	cement				Pending Rec	:all	4 4
Description	ABC Agency									
Contact Name										
Phone	555-555-5555						_			
Email	aadams@abcagency.com						_			
Address	1000 Main St.						_			
Address	Jacksonville, FL 32256									
Last Received		_	Last Sent							
Placement		~	Recall Objection			-	Complaint			~
Pending Recall		~	Payment			* *	Dispute	Ē		~
Final Recall		v	Demographic			-				
Payment		~	Close			* *				
Demographic		-	Bankruptcy			v				
Notes		¥	Deceased			~				
Misc Extra Data		~	Reconciliation			•				
Equipment			RequestResponse	•						
Request/Response		V	Acknowledgment			~ ~				
Judgment		¥	Asset			v				
Deceased		~	Judgment							
Bankruptcy		¥	Status/Notes			~				
Complaint		~	Activity Notes			v v				
Dispute		~	Work Efforts			×				
							_			
							H	Save	🐹 Cancel	🖉 Apply

2. Click the **Process** tab.

			Client Configuratio	n			×
Client Name		My A	gency Id 0	AIM Client Version	8.2.*		
🗂 Using A	Vpha Code In File Names	My A	Ipha Code				
19	History		Status and Notes (ASTS)		Paym	ents	
	Final Recall	0	Close Statuses	6		cess	•
	General		Placement		Pending	Recall	Ψ.Ψ
Payments (APAY)	Demographics (ADEM)	Reconciliation (AREC)	Deceases (ADEC)	Bankruptcies (ABKP)	Assets (AAST)	Activity Notes (ANOT)	
Closes (ACLS)	Post Dated Transaction	ns (APDT) Acknowle	dgments (AACK) N	tes (ASTS) Request	Response (ARAR	Judgments (AJDG)	1
Work Effort (AWEF)	Complaint (ACPT)	Dispute (ADIS)					
							- 1
Import							
Placement (CPLC)	Payments (CPAY)	Recall (CRCL) Demogr		Extra (CMIS) Notes (C			1
			Equipment	(CEQP) RequestRes	conse (CRAR) Ba	nkruptcies (CBKP)	
Judgments (CJDG)	Complaint (CCPT)	Dispute (CDIS)					
		0 %		📹 Import P	ile		
							_
							_
							_
					Save	Cancel 🥑 /	
					H Save	🕺 Cancel 🥑 /	-septy

- 3. In the Import section, click Assets (CAST). The Open dialog box appears.
- 4. Click the Assets file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
- 5. Click **OK**. Data from the file appears in the preview window.
- 6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
- 7. Click **OK**.
- 8. To review any processing errors, click the **History** tab.

Import Account Notes

Use the **Process** tab in the **Client Configuration** window to import notes that the client added or updated after placing the accounts with your organization. The import file only includes user notes, not system notes.

To import account notes

			Client Co	onfiguration					
Client Name			My Agency Id	0 ÷	AIM Client Ver	rsion	8.2.*		
🗌 Usin	ng Alpha Code In File Names		My Alpha Code						
10	History		Status and	Notes (ASTS)			Pa	ments	
/	Final Recall			e Status es		3		Process	•
/ Q	General		Pla	cement			Pend	ing Recall	4 4
Description	ABC Agency								
Contact Name							_		
Phone	555-555-5555								
Email	aadams@abcagency.com						_		
	1000 Main St.								
Address	Jacksonville, FL 32256								
- Last Received			Last Sent						
Placement		~	Recall Objection		~		Complaint		v
Pending Recall		v	Payment		v v		Dispute		~
Final Recall		v	Demographic			•			<u> </u>
Payment		v	Close		2 2				
Demographic		-	Bankruptcy						
Notes		Y	Deceased		~				
Misc Extra Data		v	Reconciliation		~				
Equipment			RequestResponse						
Request/Response	e	-	Acknowledgment		2 C C				
Judgment		*	Asset		~				
Deceased		~	Judgment						
Bankruptcy		~	Status/Notes						
Complaint		~	Activity Notes						
Dispute		~	Work Efforts		~	•			
							🛃 Sa	ve 🛛 😹 Cance	Apply

2. Click the **Process** tab.

			Client Configura	tion			×
Client Name			My Agency Id 0	AIM Client Version	82. 💌		
☐ Using /	Alpha Code In File Names	,	My Alpha Code				
19	History		Status and Notes (AS		Payre	vents	
	Final Recall		Close Statuses	6		ocess	_ ^
Export	General	10	Placement		Pending	g Recall	
Payments (APAY)	Demographics (ADEM)	Reconciliation (ARS	EC) Deceases (ADEC)	Bankruptcies (ABKP)	Assets (AAST)	Activity Notes (ANOT)	וונ
Closes (ACLS)	Post Dated Transactio	ns (APDT) Ackn	owledgments (AACK)	Notes (ASTS) Request	Response (ARAR	Judgments (AJDG)	
Work Effort (AWEF)	Complaint (ACPT)	Dispute (ADIS)					
							- 1
Import	Payments (CPAY)		mographics (CDEM) Mi	sc Extra (CMIS) Notes (C		ST) Deceases (CDEC)	
Placement (CPLC)	Payments (CPAT)	Recall (CRCL) Der				nkruptcies (CBKP)	
	1		Equipm	nt (CEGP) Requestines	ponse (CHAR) Ba	inkruptcies (CBRP)	
Judgments (CJDG)	Complaint (CCPT)	Dispute (CDIS)					
		0 %		S Import F	File		
							-1
							- 11
							_
					📕 Save	Cancel 🥑 /	Apply

- 3. In the Import section, click Notes (CNOT). The Open dialog box appears.
- 4. Click the Notes file to import and then, in the **Import** section, click **Open**. A notification dialog box appears, which shows the number of records in the file.
- 5. Click **OK**. Data from the file appears in the preview window.
- 6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
- 7. Click **OK**.
- 8. To review any processing errors, click the **History** tab.

Import Account Placements

Use the **Process** tab in the **Client Configuration** window to import accounts the client is placing with your organization.

To import account placements

			Client Co	onfiguration				
ent Name			My Agency Id	0 ÷	AIM Client Vers	ion 8.2.*		
∏ Usi	ing Alpha Code In File Names		My Alpha Code					
<i>Q</i>	History		Status and I	Notes (ASTS)			Payments	
	Final Recall	. 🚳		: Status es	3		Process	
Q	General		Pla	cement			Pending Recall	
escription	ABC Agency							
ontact Name	555-555-5555							
nail	aadams@abcagency.com							
ádress	1000 Main St. Jacksonville, FL 32256							
ast Received			Last Sent					
Placement		~	Recall Objection		×	Complain	nt	[
Pending Recall		¥	Payment		¥	Dispute		[
Final Recall			Demographic		~			
ayment		¥	Close		¥			
Demographic		~	Bankruptcy		~			
iotes		Y	Deceased		¥			
Aisc Extra Data		-	Reconciliation		~			
iquipment		~	RequestResponse	F	¥			
Request/Respons	se	~	Acknowledgment		¥			
ludgment		~	Asset		~			
Deceased		~	Judgment		~			
Bankruptcy		~	Status/Notes		~			
our in oping		-	Activity Notes		v			
		¥						
Complaint Dispute		>	Work Efforts		~			

2. Click the **Placement** tab.

В. н	istory	Status and Notes (ASTS)	Payments		
	Recall	Close Statuses	Process		
. G	eneral	Placement	Pending Recall		
Choose the customer and des	k to import accounts into when a pla	cement file is received.			
From Placement File					
O Use Predefined Customer	DEFAULT CUSTOMER		~		
O Customer Mapping Logic					
Cli	ent Customer	Agency Customer			
Default Customer		ABC Agency			
Auto New Customer	Manajaa				
New Costonici	- approg				
Use Desk from Placement	File				
Desk COLLECTOR DESK			¥		

3. Verify that you selected the correct customer and desk to which to move the accounts before importing the placement data.

4. Click the **Process** tab.

		Client Config	juration		×
Client Name	lpha Code In File Names	My Agency Id 0 My Alpha Code	AIM Client Versio	m 82.* 💌	
18	History	Status and Notes	(ASTS)	Payments	
	Final Recall	Close Stab		Process	_
<u>/@</u>	General	Placeme	nt 👘	Pending Recall	V V
Payments (APAY)	Demographics (ADEM) Reco	nciliation (AREC) Deceases (AL	EC) Bankruptcies (ABKP)	7) Assets (AAST) Activity	Notes (ANOT)
Closes (ACLS)	Post Dated Transactions (APD	T) Acknowledgments (AACK)	Notes (ASTS) Reque	est/Response (ARAR Judgmen	ts (AJDG)
Work Effort (AWEF)	Complaint (ACPT) Dispu	ute (ADIS)			
Import					
Placement (CPLC)	Payments (CPAY) Recall (CRCL) Demographics (CDEM)	Misc Extra (CMIS) Notes	(CNOT) Assets (CAST) De	ceases (CDEC)
		Eq	sipment (CEQP) Request Re	esponse (CRAR) Bankruptcies	(CBKP)
Judgments (CJDG)	Complaint (CCPT) Dispute	e (CDIS)			
	0%		📹 Impor	rt File	
<u> </u>					
				📕 Save 🏼 🎉 🤇	Cancel 🧭 Apply

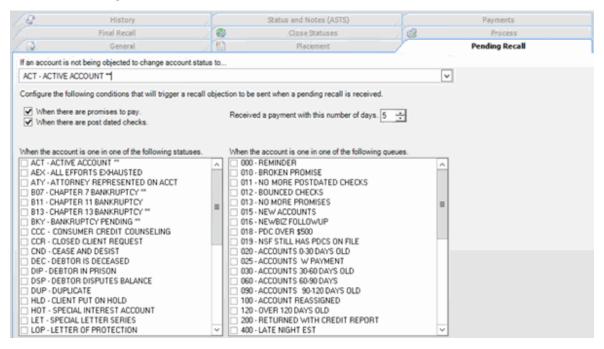
- 5. In the Import section, click Placement (CPLC). The Open dialog box appears.
- 6. Click the Placement file to import and then click **Open**. A notification dialog box appears, which shows the number of records and total account balance in the file.
- 7. Click **OK**. Data from the file appears in the preview window.
- 8. To review debtor information, click the plus sign (+) next to a file number. An account can have multiple debtors associated to it.
- 9. After reviewing the data, click **Import File**. When the import process is complete, a notification dialog box appears.
- 10. Click **OK**.
- 11. To review any processing errors, click the **History** tab.

Import Account Recalls

Use the **Process** tab in the **Client Configuration** window to import pending and final recalls received from the client for accounts that the client placed with your organization. For pending recalls, AIM Receiver Manager creates an objection file automatically for accounts that match the criteria specified on the **Pending Recall** tab. For final recalls, AIM Receiver Manager closes and returns accounts to the client with a queue level of "999" and a status of "RCL." Also, AIM Receiver Manager moves accounts to the desk specified on the **Final Recall** tab.

To import account recalls

- 1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.
- 2. Click the **Pending Recall** tab.



- 3. Verify that the configuration is correct.
- 4. Click the Final Recall tab.

18	History	- A	Status and Notes (ASTS)	A	Payments					
	Final Recall	(()	Close Statuses	🕼	Process					
10	General	/ 🛍	Placement		Pending Recall					
Make these cha	Make these changes to the account when a final recall is received.									
Move to Desk	0000000			~						

- 5. Verify that the configuration is correct.
- 6. Click the **Process** tab.

			Client Configurat	on			×
Client Name		My	Agency Id 0	AIM Client Ver	sion 8.2.* 💌		
Using /	Alpha Code In File Names	My	Alpha Code				
18	History		Status and Notes (AST	5)	Payr	nents	
10	Final Recall		Close Statuses	6		ocess	
Export	General		Placement		Pendin	g Recall	
Payments (APAY)	Demographics (ADEM)	Reconciliation (AREC	Deceases (ADEC)	Bankruptcies (AB	KP) Assets (AAST)	Activity Notes (ANOT)	
Closes (ACLS)	Post Dated Transactio	ns (APDT) Acknow	vledgments (AACK)	Notes (ASTS) Rec	uest/Response (ARAR	Judgments (AJDG)	
Work Effort (AWEF)	Complaint (ACPT)	Dispute (ADIS)					
							- 1
Placement (CPLC)	Payments (CPAY)	Recall (CRCL) Demo	graphics (CDEM) Mis	c Extra (CMIS) Not	es (CNOT) Assets (C	AST) Deceases (CDEC)	
Placement (CPLC)	Payments (CPAT)	Hecali (CHCL)				ankruptcies (CBKP)	- 11
			cquipme	request	mesponse (Crown)	ankrupicies (CDIV-)	
Judgments (CJDG)	Complaint (CCPT)	Dispute (CDIS)					
		0 %		🔞 Im	port File		
L							I
							- 11
							- 11
							- 11
					📕 Savi	e 🏼 🗶 Cancel 🖉	Apply

- 7. In the Import section, click Recall (CRCL). The Open dialog box appears.
- 8. Click the Recall file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
- 9. Click **OK**. Data from the file appears in the preview window.
- 10. Review the data and then click Import File.
- 11. If the import file contains pending recalls, AIM Receiver Manager creates an objection file and displays a dialog box. In the dialog box, click the folder to save the file to and then click **Save**.
- 12. In the notification dialog box, click **OK**.
- 13. To review any processing errors, click the **History** tab.

Import Bankruptcy Data

Use the **Process** tab in the **Client Configuration** window to import bankruptcy data that the client added or updated after placing the accounts with your organization.

To import bankruptcy data

			Client Co	onfiguration						×
Client Name			My Agency Id	• ÷	AIM Client	Version	8.2.*	•		
🗂 Usin	g Alpha Code In File Names		My Alpha Code							
19	History		Status and I	Notes (ASTS)				Payments		
	Final Recall			: Status es		3		Process		-
	General		Pla	cement				Pending Reci	all	4 4
Description	ABC Agency									
Contact Name										
Phone	555-555-5555									
Email	aadams@abcagency.com						_			
Address	1000 Main St.						_			
Address	Jacksonville, FL 32256									
Last Received		_	Last Sent							
Placement		~	Recall Objection			~	Complaint			~
Pending Recall		V V	Payment			V	Dispute			~
Final Recall		V .	Demographic			-				
Payment		*	Close			✓✓				
Demographic		$\mathbf{\vee}$	Bankruptcy			v				
Notes		¥	Deceased			-				
Misc Extra Data		~	Reconciliation			•				
Equipment			RequestResponse	P						
Request/Response		-	Acknowledgment			~				
Judgment		~	Asset			-				
Deceased		~	Judgment							
Bankruptcy		~	Status/Notes			¥				
Complaint		V	Activity Notes			~				
Dispute		~	Work Efforts			-				
-			L.							
							H	Save	🐹 Cancel	& Apply

2. Click the **Process** tab.

			Client Configuration	1			×
Client Name		My A	gency Id 0	AIM Client Version	8.2.*		
I Using	Alpha Code In File Names	My A	Ipha Code				
18	History		Status and Notes (ASTS)		Paym	ents	
1	Final Recall		Close Statuses	6		cess	•
Export	General		Placement		Pending	Recall	
Payments (APAY)	Demographics (ADEM)	Reconciliation (AREC)	Deceases (ADEC)	Bankruptcies (ABKP)	Assets (AAST)	Activity Notes (ANOT)	1
Closes (ACLS)	Post Dated Transaction	s (APDT) Acknowle	dgments (AACK) Not	es (ASTS) Request!	Response (ARAR	Judgments (AJDG)	
Work Effort (AWEF) Complaint (ACPT)	Dispute (ADIS)					
							- 1
Placement (CPLC)	Payments (CPAY) F	ecall (CRCL) Demogr	aphics (CDEM) Misc E	xtra (CMIS) Notes (CN	070 August (CA	ST) Deceases (CDEC)	
Placement (CPLC)	Payments (CPAT)	lecali (CHCL)	Equipment (nkruptcies (CBKP)	
			Edubueur (CCur) nequescriesp	onse (crown) Da	nouploies (Color)	
Judgments (CJDG)	Complaint (CCPT)	Dispute (CDIS)					
		0%		Import Fi	ile		
· · · · · · · · · · · · · · · · · · ·							- 1
							- 11
							- 11
							- 11
							- 11
							- 11
							- 11
							- 11
							- 11
							- 11
					📕 Save	🛛 🎉 Cancel 🖉 /	oply

- 3. In the Import section, click Bankruptcies (CBKP). The Open dialog box appears.
- 4. Click the Bankruptcy file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
- 5. Click **OK**. Data from the file appears in the preview window.
- 6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
- 7. Click **OK**.
- 8. To review any processing errors, click the **History** tab.

Import Complaints

Use the **Process** tab in the **Client Configuration** window to import complaints that the client added or updated after placing the accounts with your organization.

To import complaints

			Client C	onfiguration				×
Client Name			My Agency Id	0 ÷	AIM Client Vers	sion 8.2.*	<u>.</u>	
I Usi	ng Alpha Code In File Names		My Alpha Code					
18	History		Status and	Notes (ASTS)			Payments	
	Final Recall			e Status es	3		Process	-
/ 🖬	General		Pla	cement			Pending Recall	4 4
Description	ABC Agency							
Contact Name								
Phone	555-555-5555							
Email	aadams@abcagency.com							
Address	1000 Main St.							
Address	Jacksonville, FL 32256							
Last Received		_	Last Sent					
Placement		v	Recall Objection		¥	Compl	aint	~
Pending Recall		v	Payment		¥	Disput	e	
Final Recall		~	Demographic		~			<u> </u>
Payment		¥	Close		¥	1		
Demographic		v	Bankruptcy		*	ĺ		
Notes		v	Deceased		~	[
Misc Extra Data		~	Reconciliation		×			
Equipment		~	RequestResponse	2	v			
RequestRespons	e	~	Acknowledgment		~			
Judgment		~	Asset		v			
Deceased		~	Judgment		v			
Bankruptcy		~	Status/Notes		v			
Complaint		~	Activity Notes		~			
Dispute		~	Work Efforts		~			
							🛃 Save 🐹 Cancel	Apply

2. Click the **Process** tab.

			Client Configurat	ion			×
Client Name		My	Agency Id 0	AIM Client Version	8.2.*		
Using /	Apha Code In File Names	My	Alpha Code				
18	History		Status and Notes (AST	\$)	Payn	cents	
	Final Recall	0	Close Statuses	1		ocess	1 🔺
Export	General		Placement		Pending	g Recall	V v
Payments (APAY)	Demographics (ADEM)	Reconciliation (AREC	Deceases (ADEC)	Bankruptcies (ABKP)	Assets (AAST)	Activity Notes (ANOT)	
Closes (ACLS)	Post Dated Transactio	ons (APDT) Acknow	redgments (AACK)	Notes (ASTS) Request	Response (ARAR	Judgments (AJDG)	
Work Effort (AWEF)	Complaint (ACPT)	Dispute (ADIS)					
							- 1
Import							- 14
Placement (CPLC)	Payments (CPAY)	Recall (CRCL) Demo				IST) Deceases (CDEC)	
			Equipme	nt (CEQP) Request/Res	ponse (CRAR) Ba	ankruptcies (CBKP)	
Judgments (CJDG)	Complaint (CCPT)	Dispute (CDIS)					
		0%		import 😸	File		
l							
							- 11
					📕 Save	Cancel	Annhu
					Bull Dave		-way

- 3. In the Import section, click Complaint (CCPT). The Open dialog box appears.
- 4. Click the Complaints file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
- 5. Click **OK**. Data from the file appears in the preview window.
- 6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
- 7. Click **OK**.
- 8. To review any processing errors, click the **History** tab.

Import Deceased Debtor Data

Use the **Process** tab in the **Client Configuration** window to import deceased debtor data that the client added or updated after placing the accounts with your organization.

To import deceased debtor data

			Client Co	onfiguration						×
Client Name			My Agency Id	• ÷	AIM Client	Version	8.2.*	•		
🗂 Usin	g Alpha Code In File Names		My Alpha Code							
19	History		Status and I	Notes (ASTS)				Payments		
	Final Recall			: Status es		3		Process		-
	General		Pla	cement				Pending Reci	all	4 4
Description	ABC Agency									
Contact Name										
Phone	555-555-5555									
Email	aadams@abcagency.com						_			
Address	1000 Main St.						_			
Address	Jacksonville, FL 32256									
Last Received		_	Last Sent			_				
Placement		~	Recall Objection			~	Complaint			~
Pending Recall		V V	Payment			V	Dispute			~
Final Recall		Ψ.	Demographic			-				
Payment		*	Close			✓✓				
Demographic		$\mathbf{\vee}$	Bankruptcy			v				
Notes		¥	Deceased			-				
Misc Extra Data		~	Reconciliation			•				
Equipment			RequestResponse	P						
Request/Response		-	Acknowledgment			~				
Judgment		~	Asset			-				
Deceased		~	Judgment							
Bankruptcy		~	Status/Notes			¥				
Complaint		V	Activity Notes			~				
Dispute		~	Work Efforts			-				
-										
							H	Save	🐹 Cancel	🖉 Apply

2. Click the **Process** tab.

			Client Configura	tion			×
Client Name		м	ly Agency Id 0	AIM Client Version	8.2.*		
T Using	Alpha Code In File Names	м	ly Alpha Code				
18	History		Status and Notes (AS	IS)	Payn	ients	
1	Final Recall	0	Close Statuses	a di seconda di s		ocess	1 🔺
Export	General		Placement		Pending	g Recall	V V
Payments (APAY)	Demographics (ADEM)	Reconciliation (ARE	C) Deceases (ADEC)	Bankruptcies (ABKP)	Assets (AAST)	Activity Notes (ANOT)	
Closes (ACLS)	Post Dated Transacti	ons (APDT) Ackno	wiedgments (AACK)	Notes (ASTS) Request	Response (ARAR	Judgments (AJDG)	
Work Effort (AWEF)	Complaint (ACPT)	Dispute (ADIS)					
							- 1
Import							- 14
Placement (CPLC)	Payments (CPAY)	Recall (CRCL) Dem				ST) Deceases (CDEC)	
			Equipm	nt (CEQP) Request/Res	ponse (CRAR) Ba	inkruptcies (CBKP)	
Judgments (CJDG)	Complaint (CCPT)	Dispute (CDIS)					
		0 %		import 😼	File		
							<u> </u>
							- 11
					🔛 Save	Cancel	Apply
					and a serie		

- 3. In the Import section, click Deceases (CDEC). The Open dialog box appears.
- 4. Click the Deceased file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
- 5. Click **OK**. Data from the file appears in the preview window.
- 6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
- 7. Click **OK**.
- 8. To review any processing errors, click the **History** tab.

Import Demographic Data

Use the **Process** tab in the **Client Configuration** window to import demographic data (phones and addresses) that the client added or updated after placing the accounts with your organization.

To import demographic data

			Client Co	onfiguration						×
Client Name			My Agency Id	• ÷	AIM Client	Version	8.2.*	•		
🗂 Usin	ng Alpha Code In File Names		My Alpha Code							
12	History		Status and I	Notes (ASTS)				Payments		
	Final Recall			Statuses		3		Process		-
	General		Pla	cement				Pending Rec	call .	4 4
Description	ABC Agency									
Contact Name										
Phone	555-555-5555						_			
Email	aadams@abcagency.com						_			
Address	1000 Main St.						_			
Address	Jacksonville, FL 32256									
Last Received		_	Last Sent							
Placement		~	Recall Objection			-	Complaint			~
Pending Recall		~	Payment			* *	Dispute	Ē		~
Final Recall		v	Demographic			-				
Payment		~	Close			* *				
Demographic		-	Bankruptcy			v				
Notes		¥	Deceased			~				
Misc Extra Data		~	Reconciliation			•				
Equipment			RequestResponse	•						
Request/Response		V	Acknowledgment			~ ~				
Judgment		¥	Asset			v				
Deceased		~	Judgment							
Bankruptcy		¥	Status/Notes			~				
Complaint		~	Activity Notes			v v				
Dispute		~	Work Efforts			×				
							_			
							H	Save	🐹 Cancel	🖉 Apply

			Client Configurat	on)
lient Name		My	Agency Id 0	AIM Client Version	8.2.*		
🗂 Using /	Alpha Code In File Names	My	Alpha Code				
8	History		Status and Notes (AST	5	Payn	vents	
	Final Recall	0	Close Statuses	(G		ocess	1 🔺
Export	General		Placement		Pending	g Recall	Ψv
Payments (APAY)	Demographics (ADEM)	Reconciliation (AREC	Deceases (ADEC)	Bankruptcies (ABKP)	Assets (AAST)	Activity Notes (ANOT)	
Closes (ACLS)	Post Dated Transaction	ons (APDT) Acknow	viedgments (AACK)	Notes (ASTS) Request	Response (ARAR	Judgments (AJDG)	-
Work Effort (AWEF)	Complaint (ACPT)	Dispute (ADIS)					
Import			1		1	1	a là
Placement (CPLC)	Payments (CPAY)	Recall (CRCL) Demo				ST) Deceases (CDEC)	
			Equipmer	t (CEQP) Request/Res	ponse (CRAR) Ba	inkruptcies (CBKP)	
Judgments (CJDG)	Complaint (CCPT)	Dispute (CDIS)					
		0%		import i	File		
							- 1
							- 1
						Cancel	
					🚽 Save	Cancel 🧭	Apply

- 3. In the Import section, click Demographics (CDEM). The Open dialog box appears.
- 4. Click the Demographic file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
- 5. Click **OK**. Data from the file appears in the preview window.
- 6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
- 7. Click **OK**.
- 8. To review any processing errors, click the **History** tab.

Import Disputes

Use the **Process** tab in the **Client Configuration** window to import disputes that the client added or updated after placing the accounts with your organization.

To import disputes

			Client Co	onfiguration						×
Client Name			My Agency Id	• ÷	AIM Client	Version	8.2.*	•		
🗂 Usin	ng Alpha Code In File Names		My Alpha Code							
18	History		Status and I	Notes (ASTS)				Payments		
	Final Recall			Statuses		3		Process		-
	General		Pla	cement				Pending Rec	call .	4 4
Description	ABC Agency									
Contact Name										
Phone	555-555-5555						_			
Email	aadams@abcagency.com						_			
Address	1000 Main St.						_			
Address	Jacksonville, FL 32256									
Last Received		_	Last Sent							
Placement		~	Recall Objection			-	Complaint			~
Pending Recall		~	Payment			* *	Dispute	Ē		~
Final Recall		v	Demographic			-				
Payment		~	Close			* *				
Demographic		-	Bankruptcy			v				
Notes		¥	Deceased			~				
Misc Extra Data		~	Reconciliation			•				
Equipment			RequestResponse	•						
Request/Response		V	Acknowledgment			~ ~				
Judgment		¥	Asset			v				
Deceased		~	Judgment							
Bankruptcy		¥	Status/Notes			~				
Complaint		¥	Activity Notes			v v				
Dispute		~	Work Efforts			×				
							_			
							H	Save	🐹 Cancel	🖉 Apply

			Client Configurat	on)
lient Name		My	Agency Id 0	AIM Client Version	8.2.*		
🗂 Using /	Alpha Code In File Names	My	Alpha Code				
8	History		Status and Notes (AST	5	Payn	vents	
	Final Recall	0	Close Statuses	(G		ocess	1 🔺
Export	General		Placement		Pending	g Recall	Ψv
Payments (APAY)	Demographics (ADEM)	Reconciliation (AREC	Deceases (ADEC)	Bankruptcies (ABKP)	Assets (AAST)	Activity Notes (ANOT)	
Closes (ACLS)	Post Dated Transaction	ons (APDT) Acknow	viedgments (AACK)	Notes (ASTS) Request	Response (ARAR	Judgments (AJDG)	-
Work Effort (AWEF)	Complaint (ACPT)	Dispute (ADIS)					
Import			1		1	1	a là
Placement (CPLC)	Payments (CPAY)	Recall (CRCL) Demo				ST) Deceases (CDEC)	
			Equipmer	t (CEQP) Request/Res	ponse (CRAR) Ba	inkruptcies (CBKP)	
Judgments (CJDG)	Complaint (CCPT)	Dispute (CDIS)					
		0%		import i	File		
							- 1
							- 1
						Cancel	
					🚽 Save	Cancel 🧭	Apply

- 3. In the Import section, click Dispute (CDIS). The Open dialog box appears.
- 4. Click the Disputes file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
- 5. Click **OK**. Data from the file appears in the preview window.
- 6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
- 7. Click **OK**.
- 8. To review any processing errors, click the **History** tab.

Import Equipment

Use the **Process** tab in the **Client Configuration** window to import equipment that the client added or updated after placing the accounts with your organization.

To import equipment

			Client C	onfiguration				×
Client Name			My Agency Id	0 ÷	AIM Client Vers	sion 8.2.*		
I Usin	ng Alpha Code In File Names		My Alpha Code					
18	History		Status and	Notes (ASTS)			Payments	
	Final Recall			e Status es			Process	-
<u>_</u>	General		Pla	cement			Pending Recall	4 4
Description	ABC Agency							
Contact Name								
Phone	555-555-5555							
Email	aadams@abcagency.com							
Address	1000 Main St.							
Address	Jacksonville, FL 32256							
Last Received			Last Sent					
Placement		~	Recall Objection		v	Comp	plaint	¥
Pending Recall		~	Payment		× ×	Dispu	te	~
Final Recall		V	Demographic		¥	1		
Payment		v	Close		× ×	1		
Demographic		-	Bankruptcy		v	1		
Notes		¥	Deceased		~			
Misc Extra Data		~	Reconciliation		×			
Equipment			RequestResponse		¥			
Request/Response	e	-	Acknowledgment		¥	1		
Judgment		*	Asset		v	ĵ –		
Deceased		~	Judgment		~			
Bankruptcy		~	Status/Notes		~			
Complaint		~	Activity Notes		v v			
Dispute		~	Work Efforts		~]		
							🔛 Save 🛛 😹 Cancel	🖉 Apply

			Client Configuration	1			×
Client Name		My A	gency Id 0	AIM Client Version	8.2.*		
I Using	Alpha Code In File Names	My A	Ipha Code				
18	History		Status and Notes (ASTS)		Paym	ents	
1	Final Recall		Close Statuses	6		cess	•
Export	General		Placement		Pending	Recall	
Payments (APAY)	Demographics (ADEM)	Reconciliation (AREC)	Deceases (ADEC)	Bankruptcies (ABKP)	Assets (AAST)	Activity Notes (ANOT)	1
Closes (ACLS)	Post Dated Transaction	s (APDT) Acknowle	dgments (AACK) Not	es (ASTS) Request!	Response (ARAR	Judgments (AJDG)	
Work Effort (AWEF) Complaint (ACPT)	Dispute (ADIS)					
							- 1
Placement (CPLC)	Payments (CPAY) F	lecall (CRCL) Demogr	aphics (CDEM) Misc E	xtra (CMIS) Notes (CN	070 August (CA	ST) Deceases (CDEC)	
Placement (CPLC)	Payments (CPAT)	lecall (CHCL)	Equipment (nkruptcies (CBKP)	
			Edubueur (CCur) nequescriesp	onse (crown) Da	nouploies (Color)	
Judgments (CJDG)	Complaint (CCPT)	Dispute (CDIS)					
		0%		Import Fi	ile		
· · · · · · · · · · · · · · · · · · ·							- 1
							- 11
							- 11
							- 11
							- 11
							- 11
							- 11
							- 11
							- 11
							- 11
					📕 Save	🛛 🎉 Cancel 🖉 /	oply

- 3. In the Import section, click Equipment (CEQP). The Open dialog box appears.
- 4. Click the Equipment file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
- 5. Click **OK**. Data from the file appears in the preview window.
- 6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
- 7. Click **OK**.
- 8. To review any processing errors, click the **History** tab.

Import Judgment Data

Use the **Process** tab in the **Client Configuration** window to import judgment data that the client added or updated after placing the accounts with your organization.

To import judgment data

			Client Co	onfiguration						×
Client Name			My Agency Id	• ÷	AIM Client	Version	8.2.*	•		
🗂 Usin	ng Alpha Code In File Names		My Alpha Code							
18	History		Status and I	Notes (ASTS)				Payments		
	Final Recall			Statuses		3		Process		-
	General		Pla	cement				Pending Rec	call .	4 4
Description	ABC Agency									
Contact Name										
Phone	555-555-5555						_			
Email	aadams@abcagency.com						_			
Address	1000 Main St.						_			
Address	Jacksonville, FL 32256									
Last Received		_	Last Sent							
Placement		~	Recall Objection			-	Complaint			~
Pending Recall		~	Payment			* *	Dispute	Ē		~
Final Recall		v	Demographic			-				
Payment		~	Close			* *				
Demographic		-	Bankruptcy			v				
Notes		¥	Deceased			~				
Misc Extra Data		~	Reconciliation			•				
Equipment			RequestResponse	•						
Request/Response		V	Acknowledgment			~ ~				
Judgment		¥	Asset			v				
Deceased		~	Judgment							
Bankruptcy		¥	Status/Notes			~				
Complaint		~	Activity Notes			v v				
Dispute		~	Work Efforts			×				
							_			
							H	Save	🐹 Cancel	🖉 Apply

			Client Configurat	on)
lient Name		My	Agency Id 0	AIM Client Version	8.2.*		
🗂 Using /	Alpha Code In File Names	My	Alpha Code				
8	History		Status and Notes (AST	5	Payn	vents	
	Final Recall	0	Close Statuses	(G		ocess	1 🔺
Export	General		Placement		Pending	g Recall	Ψv
Payments (APAY)	Demographics (ADEM)	Reconciliation (AREC	Deceases (ADEC)	Bankruptcies (ABKP)	Assets (AAST)	Activity Notes (ANOT)	
Closes (ACLS)	Post Dated Transaction	ons (APDT) Acknow	viedgments (AACK)	Notes (ASTS) Request	Response (ARAR	Judgments (AJDG)	-
Work Effort (AWEF)	Complaint (ACPT)	Dispute (ADIS)					
Import			1		1	1	a là
Placement (CPLC)	Payments (CPAY)	Recall (CRCL) Demo				ST) Deceases (CDEC)	
			Equipmer	t (CEQP) Request/Res	ponse (CRAR) Ba	inkruptcies (CBKP)	
Judgments (CJDG)	Complaint (CCPT)	Dispute (CDIS)					
		0%		import i	File		
							- 1
							- 1
						Cancel	
					🚽 Save	Cancel 🧭	Apply

- 3. In the Import section, click Judgments (CJDG). The Open dialog box appears.
- 4. Click the Judgment file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
- 5. Click **OK**. Data from the file appears in the preview window.
- 6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
- 7. Click **OK**.
- 8. To review any processing errors, click the **History** tab.

Import Miscellaneous Extra Data

Use the **Process** tab in the **Client Configuration** window to import miscellaneous extra data that the client added or updated after placing the accounts with your organization.

To import miscellaneous extra data

			Client Co	onfiguration						×
Client Name			My Agency Id	• ÷	AIM Client	Version	8.2.*	•		
🗂 Usin	ng Alpha Code In File Names		My Alpha Code							
18	History		Status and I	Notes (ASTS)				Payments		
	Final Recall			Statuses		3		Process		-
	General		Pla	cement				Pending Rec	call .	4 4
Description	ABC Agency									
Contact Name										
Phone	555-555-5555						_			
Email	aadams@abcagency.com						_			
Address	1000 Main St.						_			
Address	Jacksonville, FL 32256									
Last Received		_	Last Sent							
Placement		~	Recall Objection			-	Complaint			~
Pending Recall		~	Payment			* *	Dispute	Ē		~
Final Recall		v	Demographic			-				
Payment		~	Close			* *				
Demographic		-	Bankruptcy			v				
Notes		¥	Deceased			~				
Misc Extra Data		~	Reconciliation			•				
Equipment			RequestResponse	•						
Request/Response		V	Acknowledgment			~ ~				
Judgment		¥	Asset			v				
Deceased		~	Judgment							
Bankruptcy		¥	Status/Notes			~				
Complaint		¥	Activity Notes			v v				
Dispute		~	Work Efforts			×				
							_			
							H	Save	🐹 Cancel	🖉 Apply

			Client Configuration	1			×
Client Name		My A	gency Id 0	AIM Client Version	8.2.*		
I Using	Alpha Code In File Names	My A	Ipha Code				
18	History		Status and Notes (ASTS)		Paym	ents	
1	Final Recall		Close Statuses	6		cess	•
Export	General		Placement		Pending	Recall	
Payments (APAY)	Demographics (ADEM)	Reconciliation (AREC)	Deceases (ADEC)	Bankruptcies (ABKP)	Assets (AAST)	Activity Notes (ANOT)	1
Closes (ACLS)	Post Dated Transaction	s (APDT) Acknowle	dgments (AACK) Not	es (ASTS) Request!	Response (ARAR	Judgments (AJDG)	
Work Effort (AWEF) Complaint (ACPT)	Dispute (ADIS)					
							- 1
Placement (CPLC)	Payments (CPAY) F	ecall (CRCL) Demogr	aphics (CDEM) Misc E	xtra (CMIS) Notes (CN	070 August (CA	ST) Deceases (CDEC)	
Placement (CPLC)	Payments (CPAT)	lecall (CHCL)	Equipment (nkruptcies (CBKP)	
			Edubueur (CCur) nequescriesp	onse (crown) Da	nouploies (Color)	
Judgments (CJDG)	Complaint (CCPT)	Dispute (CDIS)					
		0%		Import Fi	ile		
· · · · · · · · · · · · · · · · · · ·							- 1
							- 11
							- 11
							- 11
							- 11
							- 11
							- 11
							- 11
							- 11
							- 11
					📕 Save	🛛 🎉 Cancel 🖉 /	oply

- 3. In the Import section, click Misc Extra (CMIS). The Open dialog box appears.
- 4. Click the Miscellaneous Extra Data file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
- 5. Click **OK**. Data from the file appears in the preview window.
- 6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
- 7. Click **OK**.
- 8. To review any processing errors, click the **History** tab.

Import Payments

Use the **Process** tab in the **Client Configuration** window to import payments that the client added or updated after placing the accounts with your organization.

To import payments

			Client Co	onfiguration						×
Client Name			My Agency Id	0 ÷	AIM Client	Version	8.2.*	•		
🗂 Usin	ng Alpha Code In File Names		My Alpha Code							
18	History		Status and I	Notes (ASTS)				Payments		
	Final Recall			Statuses		3		Process		-
	General		Pla	cement				Pending Rec	call .	4 4
Description	ABC Agency									
Contact Name										
Phone	555-555-5555						_			
Email	aadams@abcagency.com						_			
Address	1000 Main St.						_			
Address	Jacksonville, FL 32256									
Last Received		_	Last Sent							
Placement		~	Recall Objection			-	Complaint			~
Pending Recall		~	Payment			* *	Dispute	Ē		~
Final Recall		v	Demographic			-				
Payment		~	Close			* *				
Demographic		-	Bankruptcy			v				
Notes		¥	Deceased			~				
Misc Extra Data		~	Reconciliation			•				
Equipment			RequestResponse	•						
Request/Response		V	Acknowledgment			~ ~				
Judgment		¥	Asset			v				
Deceased		~	Judgment							
Bankruptcy		¥	Status/Notes			~				
Complaint		~	Activity Notes			v v				
Dispute		~	Work Efforts			×				
							_			
							H	Save	🐹 Cancel	🖉 Apply

			Client Configurat	on)
lient Name		My	Agency Id 0	AIM Client Version	8.2.*		
🗂 Using /	Alpha Code In File Names	My	Alpha Code				
8	History		Status and Notes (AST	5	Payn	vents	
	Final Recall	0	Close Statuses	(G		ocess	1 🔺
Export	General		Placement		Pending	g Recall	Ψv
Payments (APAY)	Demographics (ADEM)	Reconciliation (AREC	Deceases (ADEC)	Bankruptcies (ABKP)	Assets (AAST)	Activity Notes (ANOT)	
Closes (ACLS)	Post Dated Transaction	ons (APDT) Acknow	viedgments (AACK)	Notes (ASTS) Request	Response (ARAR	Judgments (AJDG)	-
Work Effort (AWEF)	Complaint (ACPT)	Dispute (ADIS)					
Import			1		1	1	a là
Placement (CPLC)	Payments (CPAY)	Recall (CRCL) Demo				ST) Deceases (CDEC)	
			Equipmer	t (CEQP) Request/Res	ponse (CRAR) Ba	inkruptcies (CBKP)	
Judgments (CJDG)	Complaint (CCPT)	Dispute (CDIS)					
		0%		import i	File		
							- 1
							- 1
						Cancel	
					🚽 Save	Cancel 🧭	Apply

- 3. In the Import section, click Payments (CPAY). The Open dialog box appears.
- 4. Click the Payment file to import and then click **Open**. A notification dialog box appears, which shows the number of records and total payments in the file.
- 5. Click **OK**. Data from the file appears in the preview window.
- 6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
- 7. Click **OK**.
- 8. To review any processing errors, click the **History** tab.

Import Requests and Responses

Use the **Process** tab in the **Client Configuration** window to import account placement and recall requests from the client.

To import requests and responses

			Client Co	onfiguration						×
Client Name			My Agency Id	• ÷	AIM Client	Version	8.2.*	•		
🗂 Usin	ng Alpha Code In File Names		My Alpha Code							
18	History		Status and I	Notes (ASTS)				Payments		
	Final Recall			Statuses		3		Process		-
	General		Pla	cement				Pending Rec	call .	4 4
Description	ABC Agency									
Contact Name										
Phone	555-555-5555						_			
Email	aadams@abcagency.com						_			
Address	1000 Main St.						_			
Address	Jacksonville, FL 32256									
Last Received		_	Last Sent							
Placement		~	Recall Objection			-	Complaint			~
Pending Recall		~	Payment			* *	Dispute	Ē		~
Final Recall		v	Demographic			-				
Payment		~	Close			* *				
Demographic		-	Bankruptcy			v				
Notes		¥	Deceased			~				
Misc Extra Data		~	Reconciliation			•				
Equipment			RequestResponse	•						
Request/Response		V	Acknowledgment			~ ~				
Judgment		¥	Asset			v				
Deceased		~	Judgment							
Bankruptcy		¥	Status/Notes			~				
Complaint		¥	Activity Notes			v v				
Dispute		~	Work Efforts			×				
							_			
							H	Save	🐹 Cancel	🖉 Apply

			Client Configuration	n				x
Client Name		My A	pency Id 0	AIM Client Ve	rsion 8.2.*	*		
☐ Using A	Ipha Code In File Names	My A	lpha Code					
18	History		Status and Notes (ASTS)			Payments		
	Final Recall		Close Statuses		3	Process		•
Export	General		Placement			Pending Recall		V v
Payments (APAY)	Demographics (ADEM)	Reconciliation (AREC)	Deceases (ADEC)	Bankruptcies (A	BKP) Assets	(AAST) Acti	vity Notes (ANOT)	1
Closes (ACLS)	Post Dated Transaction	s (APDT) Acknowle	dgments (AACK) N	otes (ASTS) Re	equest/Response (ARAR Judge	ments (AJDG)	-
Work Effort (AWEF)	Complaint (ACPT)	Dispute (ADIS)						
								- 1
Placement (CPLC)	Payments (CPAY) R	ecall (CRCL) Demogra	aphics (CDEM) Misc	Extra (CMIS) No	tes (CNOT) As	isets (CAST)	Deceases (CDEC)	
riadement (CPCC)	rayments (crAt)	ecal (Cricc) Denogr	Equipment		st/Response (CRA		ties (CBKP)	
Judgments (CJDG)	Complaint (CCPT)	Dispute (CDIS)	Column	(order)	arrication and for our	- Caracopia	inea (creare)	
Judgments (CJDG)	Complaint (CCP1)							
		0%		1 I	mport File			
								- 11
								- 11
								- 11
L								
					L	- Save	🕻 Cancel 🖉 /	Apply

- 3. In the Import section, click Request/Response (CRAR). The Open dialog box appears.
- 4. Click the Request/Response file to import and then click **Open**. A notification dialog box appears, which shows the number of records in the file.
- 5. Click **OK**. Data from the file appears in the preview window.
- 6. Review the data and then click **Import File**. When the import process is complete, a notification dialog box appears.
- 7. Click **OK**.
- 8. To review any processing errors, click the **History** tab.

Export Overview

Export Overview

You have two options for exporting data from AIM Receiver. The first option is to export data for one or more clients for a specific type of data (for example, payments, recalls, notes). The second option is to export data for a specific client and type of data. Your client imports the exported data into AIM and AIM updates the account information in Latitude.

Export Data for Multiple Clients

Use the **Export** option in the **Actions** menu to export account updates for a specific type of data for clients that placed accounts with your organization. Data types include bankruptcy, account closings, deceased debtor, demographics, notes, post-dated transactions, and reconciliation. For information about exporting acknowledgments or payments, see <u>Export Acknowledgments for One or More Clients</u>.

To export data for multiple clients

- In the menu bar, click Actions > Export > and then click the type of data to export. The Browse for Folder dialog box appears.
- 2. Click the folder to export the files to and then click OK. The Client Selector dialog box appears.

Cli	ent Selector				E
	All Receiver Cli				
C	Selected Recei	ver Clients (high	lighted rows)		
)rag a column he	ader here to gro	up by that column.		
	lientid ∑⊽+	Name ∑⊽∻	Descriptio ∑⊽‡	AlphaCod ∑ ▽ 中	AgencyI∑⊽‡
Þ	6	ABC Company			2
	4	Summer Collect		A10	10
	5	Winter Collectio	Winter Collection Ag		0
				OK	
L				OK	Cancer

- 3. Do one of the following:
 - To export data for all clients, click All Receiver Clients.
 - To export data for specific clients, click **Selected Receiver Clients** and then click the clients to include in the export file.

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

4. Click **OK**. A notification dialog box appears.

5. Click **OK**.

Export Acknowledgments for Multiple Clients

Use the **Export** option in the **Actions** menu to export acknowledgments indicating that your organization received data for the accounts that clients placed with your organization.

To export acknowledgments for multiple clients

- 1. In the menu bar, click Actions > Export > Acknowledgments. The Browse for Folder dialog box appears.
- 2. Click the folder to export the files to and then click **OK**. The **Acknowledgment Selector** dialog box appears.

Acknowledgment Selector		2
Highlight the placement record	you would like to create an a	acknowledgment file for.
Placement Date	Placement Count	Name
•		ABC Company
		I
		I
		I
		I
		I
		I
		I
		I
		I
		I
		I
		I
		OK 🎽 Cancel

3. Click the account placements to acknowledge.

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

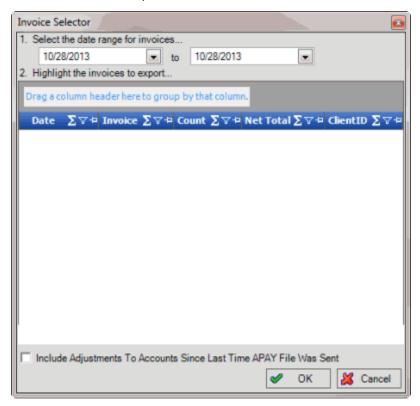
- 4. Click **OK**. A notification dialog box appears.
- 5. Click **OK**.

Export Payments for Multiple Clients

Use the **Export** option in the **Actions** menu to export payments and adjustments that your organization received for accounts that clients placed with your organization.

To export payments for multiple clients

- 1. In the menu bar, click Actions > Export > Payments. The Browse for Folder dialog box appears.
- 2. Click the folder to export the files to and then click **OK**. The **Invoice Selector** dialog box appears.



- 3. Specify the date range for the invoices to include in the export file. The dialog box displays all invoices that your organization generated during the specified date range.
- 4. Click the invoices to include in the export file. The **Net Total** signifies the total payments and reversals combined.

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

- To include invoiced DA (decreasing adjustment) or DAR (decreasing adjustment reversal) transactions in the export file, select the Include Adjustments to Accounts Since Last Time APAY File Was Sent check box.
- 6. Click **OK**. The **Save As** dialog box appears.
- 7. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
- 8. Click **OK**.

Export Account Closings

Use the **Process** tab in the **Client Configuration** window to export data for accounts that your organization has closed for the client. You cannot export account closings without assigning the number of hold days. For more information, see <u>Configure Close Status Codes</u>.

To export account closings

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

			Client Configuration			×
Client Name			My Agency Id 0 🛨	AIM Client Vers	ion 8.2.*	
⊡ Usi	ing Alpha Code In File Names		My Alpha Code			
8	History		Status and Notes (ASTS)		Payments	
	Final Recall		Close Statuses	3	Process	•
/ Q	General		Placement		Pending Recall	4 4
Description	ABC Agency					
Contact Name						
Phone	555-555-5555					
Email	aadams@abcagency.com					
	1000 Main St.					
Address	Jacksonville, FL 32256					
Last Received			Last Sent			
Placement		¥	Recall Objection	v	Complaint	¥
Pending Recall		< < <	Payment	¥	Dispute	~
Final Recall		v .	Demographic	~		
Payment		¥	Close	v		
Demographic		~	Bankruptcy	> > >		
Notes			Deceased	~		
Misc Extra Data		~	Reconciliation	v v		
Equipment		~	RequestResponse	v		
Request/Respons	se	v	Acknowledgment	~		
Judgment		~	Asset	v V		
Deceased		~	Judgment	~		
Bankruptcy		~	Status/Notes	¥		
Complaint		~	Activity Notes			
Dispute		~	Work Efforts	v V		
					🔛 Save 🛛 😹 Ca	ncel 🖉 Apply

			Client Configura	tion			
ient Name		м	y Agency Id 0	÷ AIM Client Versi	on 8.2.*		
☐ Using	Alpha Code In File Names	м	ly Alpha Code				
8	History		Status and Notes (AS	TS)	Payn	pents	
	Final Recall		Close Statuses	(3		ocess] .
Export	General	1	Placement		Pendin	g Recall	
Payments (APAY)	Demographics (ADEM)	Reconciliation (ARE	C) Deceases (ADEC)	Bankruptcies (ABK	P) Assets (AAST)	Activity Notes (ANOT)	
Closes (ACLS)	Post Dated Transactio	ns (APDT) Ackno	wledgments (AACK)	Notes (ASTS) Requ	est/Response (ARAR	Judgments (AJDG)	
Work Effort (AWEF)	Complaint (ACPT)	Dispute (ADIS)					
Import		10			Ŭ.	1	-
Placement (CPLC)	Payments (CPAY)	Recall (CRCL) Dem	ographics (CDEM) Mi	sc Extra (CMIS) Note:	(CNOT) Assets (C/	(CDEC)	
			Equipm	ent (CEQP) Request/	Response (CRAR) Ba	ankruptcies (CBKP)	
Judgments (CJDG)	Complaint (CCPT)	Dispute (CDIS)					
		0%		🗐 Imp	ort File		
					1.1.		
					🚽 Save	Cancel 🧭	Apply

- 3. In the Export section, click Closes (ACLS). The Save As dialog box appears.
- 4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
- 5. Click **OK**.

Export Account Notes

Use the **Process** tab in the **Client Configuration** window to export notes that your organization added or updated for accounts that the client placed with your organization.

To export account notes

			Client C	onfiguration				×
Client Name			My Agency Id	0 ÷	AIM Client Versi	on 8.2.*	•	
☐ Usin	ng Alpha Code In File Names		My Alpha Code					
8	History		Status and	Notes (ASTS)			Payments	
1	Final Recall			e Status es	3		Process	•
	General	1 🔝	Pl	acement			Pending Recall	4 4
Description	ABC Agency							
Contact Name								
Phone	555-555-5555							
Email	aadams@abcagency.com							
Address	1000 Main St. Jacksonville, FL 32256							
Last Received		_	Last Sent	_				
Placement		~	Recall Objection		v	Complain	t 🗌	~
Pending Recall		-	Payment		¥	Dispute		~
Final Recall		V	Demographic		*			
Payment		¥	Close		v			
Demographic		V	Bankruptcy		v			
Notes		¥	Deceased		~			
Misc Extra Data		V	Reconciliation		v			
Equipment		¥	RequestRespons	•	¥			
Request/Response	8	V	Acknowledgment		v			
Judgment		¥	Asset		~			
Deceased		~	Judgment		~			
Bankruptcy		¥	Status/Notes		v			
Complaint		~	Activity Notes		v			
Dispute		~	Work Efforts		~			
						Ī	📕 Save 🛛 😹 Cancel	Apply

			Client Configu	iration				
ent Name			My Agency Id 0	÷ AIM CEr	ent Version 8.2			
🗐 Using /	Upha Code In File Names		My Alpha Code					
9	History		Status and Notes	(ASTS)		Payn	vents	
	Final Recall		Close Status		6		ocess]
Export	General	1	Placement		3	Pendin	g Recall	
Payments (APAY)	Demographics (ADEM)	Reconciliation (A	REC) Deceases (ADE	C) Bankruptci	es (ABKP)	asets (AAST)	Activity Notes (ANOT)	1
Closes (ACLS)	Post Dated Transactio	ns (APDT) Ac	knowledgments (AACK)	Notes (ASTS)	Request/Resp	onse (ARAR	Judgments (AJDG)	1
Work Effort (AWEF)	Complaint (ACPT)	Dispute (ADIS)	7					
			_					_
Import			-					
Placement (CPLC)	Payments (CPAY)	Recall (CRCL)	Demographics (CDEM)	Misc Extra (CMIS)	Notes (CNOT	Assets (CA	ST) Deceases (CDEC)	
			Equi	pment (CEQP) R	equestResponse	(CRAR) Ba	nkruptcies (CBKP)	
Judgments (CJDG)	Complaint (CCPT)	Dispute (CDIS)						
		0%		10	Mark File			
		¥ 4			a importane			
								-

- 3. In the Export section, click Notes (ANOT). The Save As dialog box appears.
- 4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
- 5. Click **OK**.

Export Acknowledgments

Use the **Process** tab in the **Client Configuration** window to export acknowledgments indicating that your organization received data for the accounts that the client placed with your organization.

To export acknowledgments

			Client C	onfiguration				×
Client Name			My Agency Id	0 ÷	AIM Client Vers	ion 8.2.*	•	
☐ Usir	ng Alpha Code In File Names		My Alpha Code					
8	History		Status and	Notes (ASTS)			Payments	
1	Final Recall		Clos	e Status es	3		Process	•
	General		Pl.	scement			Pending Recall	. .
Description	ABC Agency							
Contact Name								
Phone	555-555-5555							
Email	aadams@abcagency.com							
	1000 Main St.							
Address	Jacksonville, FL 32256							
Last Received		_	Last Sent					
Placement		~	Recall Objection		v	Complain	t	v
Pending Recall		~	Payment		¥	Dispute		~
Final Recall		v .	Demographic		v			
Payment		¥	Close		¥			
Demographic		v	Bankruptcy		¥			
Notes		v 1	Deceased		¥			
Misc Extra Data		-	Reconciliation		~			
Equipment		v	RequestRespons	•	v			
Request/Response	e	~	Acknowledgment		~			
Judgment		~	Asset		~			
Deceased		~	Judgment		~			
Bankruptcy			Status/Notes					
Complaint		~	Activity Notes		~			
Dispute			Work Efforts					
						ſ	🚽 Save 🛛 🎉 Cancel	& Acoly
						U		U .497

			Client Configura	ation				
ent Name			My Agency Id 0	÷ AIM Clien	t Version 8.2.			
🗐 Using /	Apha Code In File Names		My Alpha Code					
8	History		Status and Notes (A			Paym	ents	
	Final Recall		Close Statuse	· · · · · · · · · · · · · · · · · · ·	3		ocess]
Export	General	123	Placement		1	Pending	Recall	
Payments (APAY)	Demographics (ADEM)	Reconciliation (A	REC) Deceases (ADEC) Bankruptcier	s (ABKP) Ad	ssets (AAST)	Activity Notes (ANOT)	
Closes (ACLS)	Post Dated Transaction	ons (APDT) Ack	knowledgments (AACK)	Notes (ASTS)	Request/Respo	onse (ARAR	Judgments (AJDG)	
Work Effort (AWEF)	Complaint (ACPT)	Dispute (ADIS)	1					
								_
Import						1		-
Placement (CPLC)	Payments (CPAY)	Recall (CRCL) D		fisc Extra (CMIS)	Notes (CNOT)	<u> </u>		
			Equips	nent (CEQP) Re	questResponse	(CRAR) Ba	nkruptcies (CBKP)	
Judgments (CJDG)	Complaint (CCPT)	Dispute (CDIS)						
		0 %			Import File			
								_

- 3. In the **Export** section, click **Acknowledgments (AACK)**. The **Save As** dialog box appears.
- 4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
- 5. Click **OK**.

Export Assets

Use the **Process** tab in the **Client Configuration** window to export assets that your organization added or updated for accounts that the client placed with your organization.

To export assets

			Client C	onfiguration				×
Client Name			My Agency Id	0 ÷	AIM Client Vers	ion 8.2.*		
☐ Usir	ng Alpha Code In File Names		My Alpha Code					
18	History		Status and	Notes (ASTS)			Payments	
	Final Recall			e Status es	3		Process	· ·
	General		Pla	scement			Pending Recall	. .
Description	ABC Agency							
Contact Name								
Phone	555-555-5555							
Email	aadams@abcagency.com							
	1000 Main St.							
Address	Jacksonville, FL 32256							
Last Received			Last Sent					
Placement		~	Recall Objection		¥	Complain	t	~
Pending Recall		v	Payment		¥	Dispute		~
Final Recall		v .	Demographic		~			
Payment		¥	Close		*			
Demographic		~	Bankruptcy		v			
Notes		¥	Deceased		*			
Misc Extra Data		-	Reconciliation		~			
Equipment		~	RequestRespons	•	¥			
Request/Response		~	Acknowledgment		~			
Judgment		× ×	Asset		¥			
Deceased		~	Judgment		V			
Bankruptcy		~	Status/Notes		~			
Complaint		~	Activity Notes		~			
Dispute			Work Efforts		~			
						l.	🚽 Save 🛛 😹 Cancel	Apply

			Client Configura	tion			
ient Name		м	y Agency Id 0	÷ AIM Client Versi	on 8.2.*		
☐ Using	Alpha Code In File Names	М	ly Alpha Code				
8	History		Status and Notes (AS	TS)	Payn	sents	
	Final Recall		Close Statuses	(G		ocess] -
Export	General		Placement		Pendin	g Recall	
Payments (APAY)	Demographics (ADEM)	Reconciliation (ARE	C) Deceases (ADEC)	Bankruptcies (ABK	P) Assets (AAST)	Activity Notes (ANOT)	
Closes (ACLS)	Post Dated Transactio	ns (APDT) Ackno	wledgments (AACK)	Notes (ASTS) Requ	est/Response (ARAR	Judgments (AJDG)	
Work Effort (AWEF)	Complaint (ACPT)	Dispute (ADIS)					
Import							- 1
Placement (CPLC)	Payments (CPAY)	Recall (CRCL) Dem	ographics (CDEM) Mi	sc Extra (CMIS) Notes	(CNOT) Assets (C/	(CDEC)	
			Equipm	ent (CEQP) Request/F	Response (CRAR) Ba	ankruptcies (CBKP)	
Judgments (CJDG)	Complaint (CCPT)	Dispute (CDIS)					
		0%		🗐 Impi	art File		
					1.1.		
					📕 Save	Cancel 🧭	Apply

- 3. In the Export section, click Assets (AAST). The Save As dialog box appears.
- 4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
- 5. Click **OK**.

Export Bankruptcy Data

Use the **Process** tab in the **Client Configuration** window to export bankruptcy data that your organization added or updated for accounts that the client placed with your organization.

To export bankruptcy data

			Client C	onfiguration					×
Client Name			My Agency Id	0 ÷	AIM Client Ve	rsion	8.2.*	-	
☐ Usin	g Alpha Code In File Names		My Alpha Code						
8	History		Status and	Notes (ASTS)				Payments	
1	Final Recall		Clos	e Status es		3		Process	_
	General		PL	acement				Pending Recall	V V
Description	ABC Agency								
Contact Name							_		
Phone	555-555-5555								
Email	aadams@abcagency.com								
	1000 Main St.								
Address	Jacksonville, FL 32256								
Last Received		_	Last Sent			_	_		
Placement		-	Recall Objection			2	Complaint		~
Pending Recall		v	Payment		v	2	Dispute		~
Final Recall		v .	Demographic			•			
Payment		¥	Close		~	-			
Demographic		v	Bankruptcy						
Notes		¥ 1	Deceased						
Misc Extra Data		-	Reconciliation			-			
Equipment		~	RequestRespons	•	v				
Request/Response	2	~	Acknowledgment						
Judgment		~	Asset						
Deceased		~	Judgment						
Bankruptcy		v	Status/Notes						
Complaint			Activity Notes		 [v	-			
Dispute			Work Efforts						
		<u> </u>				-			
							10	Save 🔏 Cancel	and tracks
								Save A Cancel	- Abbil

			Client Configurat	ion			2
lient Name			My Agency Id 0	AIM Client Version	8.2.*		
🗐 Using	Alpha Code In File Name		My Alpha Code				
Q.	History		Status and Notes (AST		Paym	ents	
	Final Recall		Close Statuses	6		cess	. *
Export	General	100	Placement		Pending	Recall	ΨΨ
Payments (APAY)	Demographics (ADEM) Reconciliation (AR	EC) Deceases (ADEC)	Bankruptcies (ABKP)	Assets (AAST)	Activity Notes (ANOT)	
Closes (ACLS)	Post Dated Transac	tions (APDT) Ackn	owledgments (AACK)	Notes (ASTS) Request	Response (ARAR	Judgments (AJDG)	
Work Effort (AWEF	5) Complaint (ACPT)	Dispute (ADIS)					
Import							n la
Placement (CPLC) Payments (CPAY)	Recall (CRCL) Der		c Extra (CMIS) Notes (C		ST) Deceases (CDEC)	
			Equipme	nt (CEQP) Request/Res	ponse (CRAR) Ba	nkruptcies (CBKP)	
Judgments (CJDG	i) Complaint (CCPT)	Dispute (CDIS)					
		0 %		import i	File		
							Ξ.
					📙 Save	🔀 Cancel 🖉 🖉	nelu
					Save		4443

- 3. In the Export section, click Bankruptcies (ABKP). The Save As dialog box appears.
- 4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
- 5. Click **OK**.

Export Complaints

Use the **Process** tab in the **Client Configuration** window to export complaints that your organization added or updated for accounts that the client placed with your organization.

To export complaints

			Client C	onfiguration					×
Client Name			My Agency Id	0 ÷	AIM Client Ve	rsion	8.2.*	-	
☐ Usin	g Alpha Code In File Names		My Alpha Code						
8	History		Status and	Notes (ASTS)				Payments	
1	Final Recall		Clos	e Status es		3		Process	_
	General		PL	acement				Pending Recall	V V
Description	ABC Agency								
Contact Name							_		
Phone	555-555-5555								
Email	aadams@abcagency.com								
	1000 Main St.								
Address	Jacksonville, FL 32256								
Last Received		_	Last Sent			_	_		
Placement		-	Recall Objection			2	Complaint		~
Pending Recall		v	Payment		v	2	Dispute		~
Final Recall		v .	Demographic			•			
Payment		¥	Close		~	•			
Demographic		v	Bankruptcy			•			
Notes		¥ 1	Deceased						
Misc Extra Data		-	Reconciliation			-			
Equipment		~	RequestRespons	•	v				
Request/Response	2	~	Acknowledgment						
Judgment		~	Asset						
Deceased		~	Judgment						
Bankruptcy		v	Status/Notes						
Complaint			Activity Notes		 [v	-			
Dispute			Work Efforts						
		<u> </u>				-			
							10	Save 🔏 Cancel	and tracks
								Save A Cancel	- Abbil

Final Final Coport Payments (APAY) Der Closes (ACLS) P Work Effort (AIWEF) Co Import Placement (CPLC) Pa	Code In File Names listory Recall mographics (ADEM) tost Dated Transaction omplaint (ACPT)	Reconciliation ns (APDT) / Dispute (ADIS)	Acknowledgments (AAC	tes (ASTS) atuses ment (ADEC) Bankruptci	ent Version 82*		55
Final Final Coport Payments (APAY) Der Closes (ACLS) P Work Effort (AIWEF) Co Import Placement (CPLC) Pa	Iistory Recall mographics (ADEM) Iost Dated Transaction omplaint (ACPT)	Reconciliation	Status and No Close 3 Place (AREC) Deceases Acknowledgments (AAC	atuses ment (ADEC) Bankruptci	ies (ABKP) Asse	Proce Pending Ro ets (AAST)	ecall Activity Notes (ANOT)
Pinal Export Payments (APAY) Den Closes (ACLS) P Work Effort (AIVEF) Co Import Placement (CPLC) Pa	Recall eneral mographics (ADEM) lost Dated Transaction omplaint (ACPT)	Reconciliation	Close 9 Place (AREC) Deceases Acknowledgments (AAC	atuses ment (ADEC) Bankruptci	ies (ABKP) Asse	Proce Pending Ro ets (AAST)	ecall Activity Notes (ANOT)
Export Payments (APAY) Der Closes (ACLS) P Work Effort (AIvEF) Co Import Placement (CPLC) Pa	eneral mographics (ADEM) lost Dated Transaction omplaint (ACPT)	Reconciliation	(AREC) Deceases	(ADEC) Bankruptci	ies (ABKP) Asse	Pending Re ets (AAST)	ecall Activity Notes (ANOT)
Export Payments (APAY) Der Closes (ACLS) P Work Effort (Alv/EF) Co Import Placement (CPLC) Pa	mographics (ADEM) fost Dated Transaction omplaint (ACPT)	Reconciliation	(AREC) Deceases	(ADEC) Bankruptci		ets (AAST)	Activity Notes (ANOT)
Payments (APAY) Der Closes (ACLS) P Work Effort (AINEF) Co Import Placement (CPLC) Pa	ost Dated Transaction	ns (APDT)	Acknowledgments (AAC				
Work Effort (AIWEF) Co Import Placement (CPLC) Pa	omplaint (ACPT)			K) Notes (ASTS)	Request/Respons	ie (ARAR J	udgments (AJDG)
Import Placement (CPLC) Pa		Dispute (ADIS)					
Import Placement (CPLC) Pa		,,					
Placement (CPLC) Pa	ayments (CPAY)						
	syments (CPAY)						
Judgments (CJDG)		Recall (CRCL)	Demographics (CDEM) Misc Extra (CMIS)	Notes (CNOT)	Assets (CAST) Deceases (CDEC)
Judgments (CJDG)			1	Equipment (CEQP)	Request/Response (C	RAR) Bankr	uptcies (CBKP)
Judgments (CJDG) Co			7				
	mplaint (CCPT)	Dispute (CDIS)					
		0%			Import File		
						Save	🔏 Cancel 🖉 A

- 3. In the **Export** section, click **Complaint (ACPT)**. The **Save As** dialog box appears.
- 4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
- 5. Click **OK**.

Export Deceased Debtor Data

Use the **Process** tab in the **Client Configuration** window to export data for debtors who became deceased after the client placed the accounts with your organization. The export file only includes accounts with an open status.

To export deceased debtor data

			Client C	onfiguration				×
Client Name			My Agency Id	0 ÷	AIM Client Versi	on 8.2.*	•	
☐ Usin	ng Alpha Code In File Names		My Alpha Code					
18	History		Status and	Notes (ASTS)			Payments	
	Final Recall			e Status es	3		Process	•
	General		Ph	cement			Pending Recall	. .
Description	ABC Agency							
Contact Name								
Phone	555-555-5555							
Email	aadams@abcagency.com							
	1000 Main St.							
Address	Jacksonville, FL 32256							
Last Received			Last Sent					
Placement		~	Recall Objection		¥	Complaint		¥
Pending Recall		v	Payment		¥	Dispute		
Final Recall		v .	Demographic		~			
Payment		¥	Close		*			
Demographic		-	Bankruptcy		¥			
Notes		¥	Deceased		¥			
Misc Extra Data		-	Reconciliation		~			
Equipment		~	RequestRespons		¥			
Request/Response		~	Acknowledgment		~			
Judgment		~	Asset		v			
Deceased		~	Judgment		~			
Bankruptcy		~	Status/Notes		¥			
Complaint		~	Activity Notes		v			
Dispute		~	Work Efforts		~			
						l.	🚽 Save 🛛 🎉 Cancel	Apply

			Client Configurat	ion			×
Client Name			My Agency Id 0	+ AIM Client Version	8.2.*		
C Using	Alpha Code In File Names		My Alpha Code				
18	History		Status and Notes (AST	\$)	Paym	ents	
	Final Recall		Close Statuses	8		cess	•
Export	General		Placement	4	Pending) Recall	
Payments (APAY)	Demographics (ADEM)	Reconciliation (ARS	EC) Deceases (ADEC)	Bankruptcies (ABKP)	Assets (AAST)	Activity Notes (ANOT)	1
Closes (ACLS)	Post Dated Transacti	ons (APDT) Ackn	owledgments (AACK)	Notes (ASTS) Request	Response (ARAR	Judgments (AJDG)	·
Work Effort (AWEF)	Complaint (ACPT)	Dispute (ADIS)					
							- 1
Import							
Placement (CPLC)	Payments (CPAY)	Recall (CRCL) Der				ST) Deceases (CDEC)	1
			Equipme	nt (CEQP) Request/Resp	xonse (CRAR) Ba	nkruptcies (CBKP)	
Judgments (CJDG)	Complaint (CCPT)	Dispute (CDIS)					
		0 %		Import F	ile		
l							
					📕 Save	Cancel 🥑 /	oply

- 3. In the Export section, click Deceases (ADEC). The Save As dialog box appears.
- 4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
- 5. Click **OK**.

Export Demographic Data

Use the **Process** tab in the **Client Configuration** window to export phones and addresses that your organization added or updated for accounts that the client placed with your organization.

To export demographic data

			Client C	onfiguration				×
Client Name			My Agency Id	0 ÷	AIM Client Versi	on 8.2.*	•	
☐ Usin	ng Alpha Code In File Names		My Alpha Code					
18	History		Status and	Notes (ASTS)			Payments	
	Final Recall			e Status es	3		Process	•
	General		Ph	cement			Pending Recall	4 4
Description	ABC Agency							
Contact Name								
Phone	555-555-5555							
Email	aadams@abcagency.com							
	1000 Main St.							
Address	Jacksonville, FL 32256							
Last Received			Last Sent					
Placement		~	Recall Objection		¥	Complaint		¥
Pending Recall		v	Payment		¥	Dispute		
Final Recall		v .	Demographic		~			
Payment		¥	Close		*			
Demographic		-	Bankruptcy		¥			
Notes		¥	Deceased		¥			
Misc Extra Data		-	Reconciliation		~			
Equipment		~	RequestRespons		¥			
Request/Response		~	Acknowledgment		~			
Judgment		* *	Asset		v			
Deceased		~	Judgment		~			
Bankruptcy		~	Status/Notes		¥			
Complaint		~	Activity Notes		v			
Dispute		~	Work Efforts		~			
						l.	🚽 Save 🛛 🎉 Cancel	Apply

			Client Configura	tion			
ient Name		м	y Agency Id 0	÷ AIM Client Versi	on 8.2.*		
☐ Using	Alpha Code In File Names	М	ly Alpha Code				
8	History		Status and Notes (AS	TS)	Payn	sents	
	Final Recall		Close Statuses	(G		ocess] -
Export	General		Placement		Pendin	g Recall	
Payments (APAY)	Demographics (ADEM)	Reconciliation (ARE	C) Deceases (ADEC)	Bankruptcies (ABK	P) Assets (AAST)	Activity Notes (ANOT)	
Closes (ACLS)	Post Dated Transactio	ns (APDT) Ackno	wledgments (AACK)	Notes (ASTS) Requ	est/Response (ARAR	Judgments (AJDG)	
Work Effort (AWEF)	Complaint (ACPT)	Dispute (ADIS)					
Import							- 1
Placement (CPLC)	Payments (CPAY)	Recall (CRCL) Dem	ographics (CDEM) Mi	sc Extra (CMIS) Notes	(CNOT) Assets (C/	(CDEC)	
			Equipm	ent (CEQP) Request/F	Response (CRAR) Ba	ankruptcies (CBKP)	
Judgments (CJDG)	Complaint (CCPT)	Dispute (CDIS)					
		0%		🗐 Impi	art File		
					1.1.		
					📕 Save	Cancel 🧭	Apply

- 3. In the Export section, click Demographics (ADEM). The Save As dialog box appears.
- 4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
- 5. Click **OK**.

Export Disputes

Use the **Process** tab in the **Client Configuration** window to export disputes that your organization added or updated for accounts that the client placed with your organization.

To export disputes

			Client C	onfiguration				×
Client Name			My Agency Id	0 ÷	AIM Client Versi	on 8.2.*	•	
☐ Usin	ng Alpha Code In File Names		My Alpha Code					
18	History		Status and	Notes (ASTS)			Payments	
	Final Recall			e Status es	3		Process	•
	General		Pla	cement			Pending Recall	4 4
Description	ABC Agency							
Contact Name								
Phone	555-555-5555							
Email	aadams@abcagency.com							
	1000 Main St.							
Address	Jacksonville, FL 32256							
Last Received			Last Sent					
Placement		~	Recall Objection		¥	Complaint		¥
Pending Recall		v	Payment		¥	Dispute		
Final Recall		v .	Demographic		~			
Payment		¥	Close		*			
Demographic		-	Bankruptcy		¥			
Notes		¥	Deceased		¥			
Misc Extra Data		-	Reconciliation		~			
Equipment		~	RequestRespons		¥			
Request/Response		~	Acknowledgment		~			
Judgment		* *	Asset		v			
Deceased		~	Judgment		~			
Bankruptcy		~	Status/Notes		¥			
Complaint		~	Activity Notes		v			
Dispute		~	Work Efforts		~			
						l.	🚽 Save 🛛 🎉 Cancel	Apply

			Client Configurat	ion			×
Client Name			My Agency Id 0	+ AIM Client Version	8.2.*		
C Using	Alpha Code In File Names		My Alpha Code				
18	History		Status and Notes (AST	\$)	Paym	ents	
	Final Recall		Close Statuses	8		cess	•
Export	General		Placement		Pending) Recall	
Payments (APAY)	Demographics (ADEM)	Reconciliation (ARS	EC) Deceases (ADEC)	Bankruptcies (ABKP)	Assets (AAST)	Activity Notes (ANOT)	1
Closes (ACLS)	Post Dated Transacti	ons (APDT) Ackn	owledgments (AACK)	Notes (ASTS) Request	Response (ARAR	Judgments (AJDG)	·
Work Effort (AWEF)	Complaint (ACPT)	Dispute (ADIS)					
							- 1
Import							
Placement (CPLC)	Payments (CPAY)	Recall (CRCL) Der				ST) Deceases (CDEC)	1
			Equipme	nt (CEQP) Request/Resp	xonse (CRAR) Ba	nkruptcies (CBKP)	
Judgments (CJDG)	Complaint (CCPT)	Dispute (CDIS)					
		0 %		Import F	ile		
l							
					📕 Save	Cancel 🥑 /	oply

- 3. In the Export section, click Dispute (ADIS). The Save As dialog box appears.
- 4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
- 5. Click **OK**.

Export Judgment Data

Use the **Process** tab in the **Client Configuration** window to export judgment data that your organization added or updated for accounts that the client placed with your organization.

To export judgment data

			Client C	onfiguration				×
Client Name			My Agency Id	0 ÷	AIM Client Vers	ion 8.2.*	•	
🖂 Usir	ng Alpha Code In File Names		My Alpha Code					
8	History		Status and	Notes (ASTS)			Payments	
1	Final Recall		Clos	e Status es	3		Process	•
	General		Pl.	scement			Pending Recall	. .
Description	ABC Agency							
Contact Name								
Phone	555-555-5555							
Email	aadams@abcagency.com							
	1000 Main St.							
Address	Jacksonville, FL 32256							
Last Received		_	Last Sent					
Placement		~	Recall Objection		v	Complain	t	~
Pending Recall		~	Payment		¥	Dispute		~
Final Recall		v .	Demographic		v			
Payment		¥	Close		¥			
Demographic		v	Bankruptcy		¥			
Notes		v 1	Deceased		¥			
Misc Extra Data		-	Reconciliation		~			
Equipment		v	RequestRespons	•	v			
Request/Response	e	~	Acknowledgment		~			
Judgment		~	Asset		v			
Deceased		~	Judgment		~			
Bankruptcy			Status/Notes					
Complaint		~	Activity Notes		~			
Dispute			Work Efforts					
						ſ	🚽 Save 🛛 🎉 Cancel	& Acoly
						U		U .497

			Client Configurat	ion		
ent Name		M	Agency Id 0	AIM Client Version	8.2.	
🗐 Using A	Ipha Code In File Names	My	Alpha Code			
8	History		Status and Notes (AS		Payn	vents
	Final Recall		Close Statuses	6	Pro	ocess
Export	General	12	Placement		Penoin	р месан
Payments (APAY)	Demographics (ADEM)	Reconciliation (AREC	Deceases (ADEC)	Bankruptcies (ABKP)	Assets (AAST)	Activity Notes (ANOT)
Closes (ACLS)	Post Dated Transactions	(APDT) Acknow	vledgments (AACK)	Notes (ASTS) Request	Response (ARAR	Judgments (AJDG)
Work Effort (AWEF)	Complaint (ACPT)	Dispute (ADIS)				
Import						
Placement (CPLC)	Payments (CPAY) Re	scall (CRCL) Demo	graphics (CDEM) Mis	c Extra (CMIS) Notes (C	NOT) Assets (CA	ST) Deceases (CDEC)
			Equipme	nt (CEQP) Request/Res	ponse (CRAR) Ba	inkruptcies (CBKP)
Judgments (CJDG)	Complaint (CCPT)	ispute (CDIS)				
		0%		M Import	File	
				- mport	ine .	

- 3. In the Export section, click Judgments (AJDG). The Save As dialog box appears.
- 4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
- 5. Click **OK**.

Export Payments

Use the **Process** tab in the **Client Configuration** window to export payments and adjustments that your organization received for accounts that the client placed with your organization. The export file only includes payments that you invoiced to the client using the Invoices program.

To export payments

			Client C	onfiguration				×
Client Name			My Agency Id	0 ÷	AIM Client Vers	ion 8.2.*	•	
🖂 Usir	ng Alpha Code In File Names		My Alpha Code					
8	History		Status and	Notes (ASTS)			Payments	
1	Final Recall		Clos	e Status es	3		Process	•
	General		Pl.	scement			Pending Recall	. .
Description	ABC Agency							
Contact Name								
Phone	555-555-5555							
Email	aadams@abcagency.com							
	1000 Main St.							
Address	Jacksonville, FL 32256							
Last Received		_	Last Sent					
Placement		~	Recall Objection		v	Complain	t	~
Pending Recall		~	Payment		¥	Dispute		~
Final Recall		v .	Demographic		v			
Payment		¥	Close		¥			
Demographic		v	Bankruptcy		¥			
Notes		v 1	Deceased		¥			
Misc Extra Data		-	Reconciliation		~			
Equipment		v	RequestRespons	•	v			
Request/Response	e	~	Acknowledgment		~			
Judgment		~	Asset		v			
Deceased		~	Judgment		~			
Bankruptcy			Status/Notes					
Complaint		~	Activity Notes		~			
Dispute			Work Efforts					
						ſ	🚽 Save 🛛 🎉 Cancel	& Acoly
						U		U .497

			Client Configura	tion			
ient Name	Alpha Code In File Names		My Agency Id 0 My Alpha Code	AIM Client Version	8.2.*		
9	History		Status and Notes (AS	TS)	Payn	ients	
	Final Recall General	0	Close Statuses Placement	G		p cess g Recall].:
Export	-alemenal		matement		Period	a mouth	
Payments (APAY)	Demographics (ADEM	 Reconciliation (A 	REC) Deceases (ADEC)	Bankruptcies (ABKP)	Assets (AAST)	Activity Notes (ANOT)	
Closes (ACLS)	Post Dated Transact	tions (APDT) Aci	knowledgments (AACK)	Notes (ASTS) Reques	Response (ARAR	Judgments (AJDG)	
Work Effort (AWEF	Complaint (ACPT)	Dispute (ADIS)	1				
							_
Import					Ŭ.	10.00	
Placement (CPLC)) Payments (CPAY)	Recall (CRCL) D	emographics (CDEM) M	isc Extra (CMIS) Notes (0	(NOT) Assets (CA	ST) Deceases (CDEC)	
			Equipm	ent (CEQP) Request Rec	ponse (CRAR) Ba	nkruptcies (CBKP)	
Judgments (CJDG) Complaint (CCPT)	Dispute (CDIS)					
		0%		import	File		

3. In the **Export** section, click **Payments (APAY)**. The **Invoice Selector** dialog box appears.

Invoice Selector		E
 Select the date range for invoices 		
10/28/2013 • to 10/28/2013		
Highlight the invoices to export		
Drag a column header here to group by that column.		
Date ∑⊽⊕ Invoice ∑⊽⊕ Count ∑⊽⊕ Net	Total Σ⊽ ≠ Client	IDΣ⊽≠
	- i	
Include Adjustments To Accounts Since Last Time AF	PAY File Was Sent	
	🖌 ОК 🐹	Cancel

- 4. Specify the date range for the invoices to include in the export file. The dialog box displays all invoices that your organization generated for the client during the specified date range.
- 5. Click the invoices to include in the export file. The **Net Total** signifies the total payments and reversals combined.

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

- 6. To include invoiced DA (decreasing adjustment) or DAR (decreasing adjustment reversal) transactions in the export file, select the **Include Adjustments to Accounts Since Last Time APAY File Was Sent** check box.
- 7. Click OK. The Save As dialog box appears.
- 8. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
- 9. Click OK.

Export Post-Dated Transactions

Use the **Process** tab in the **Client Configuration** window to export post-dated transactions that your organization added or updated for accounts that the client placed with your organization. The export file includes all post-dated transactions for accounts that the client placed with your organization, even ones reported previously.

To export post-dated transactions

1. In the **AIM Receiver Manager** window, in the Name column of the data grid, click the Client icon. The **Client Configuration** window appears, with the **General** tab selected.

			Client Configuration			
ient Name ☐ ☐ Usin	ng Alpha Code In File Names		My Agency Id 0 ÷	AIM Client Version	82* •	
0	History		Status and Notes (ASTS)		Payments	
<i>(</i>	Final Recall		Close Statuses	3	Process	
	General	- 1	Placement	and the second sec	Pending Recall	7
Description	ABC Agency					
Phone	555-555-5555					
Email	aadams@abcagency.com					
Address	1000 Main St. Jacksonville, FL 32256					
Last Received			Last Sent			
Placement Pending Recall		<u> </u>	Recall Objection	v	Complaint	¥
Final Recall		<u> </u>	Payment	V	Dispute	V
		<u> </u>	Demographic	~		
		- V	Close	~		
			P. A. WARD			
Demographic			Bankruptcy	v		
Demographic Notes		~	Deceased	~		
Demographic Notes Misc Extra Data			Deceased Reconciliation	> >		
Demographic Notes Misc Extra Data Equipment		¥	Deceased Reconciliation RequestResponse	~		
Demographic Notes Misc Extra Data Equipment Request/Response		~	Deceased Reconciliation RequestResponse Acknowledgment	~		
Demographic Notes Misc Extra Data Equipment Request/Response Judgment	· · · · · · · · · · · · · · · · · · ·	> >	Deceased Reconciliation RequestResponse Acknowledgment Asset	~		
Demographic Notes Misc Extra Data Equipment Request/Response Judgment Deceased		> > > >	Deceased Reconciliation RequestResponse Acknowledgment Asset Judgment	2 2 2		
Demographic Notes Misc Extra Data Equipment Request/Response Judgment Deceased Bankruptcy		> > > > >	Deceased Reconciliation Request/Response Acknowledgment Judgment Status/Notes	> > > >		
Payment Demographic Notes Misc Extra Data Equipment Request/Response Judgment Deceased Bankruptcy Complaint Dispute		> > > >	Deceased Reconciliation RequestResponse Acknowledgment Asset Judgment	2 2 2		

			Client Configurat	on			
lient Name		My	Agency Id 0	AIM Client Version	8.2		
🗐 Using A	Ipha Code In File Names	My	Alpha Code				
9	History		Status and Notes (AST		Payn		
	Final Recall General		Close Statuses Placement	6		ocess	_ ^
Export	General	110	Pracement		Penoin	g Recall	
Payments (APAY)	Demographics (ADEM)	Reconciliation (AREC)	Deceases (ADEC)	Bankruptcies (ABKP)	Assets (AAST)	Activity Notes (ANOT)	1
Closes (ACLS)	Post Dated Transaction	s (APDT) Acknow	ledgments (AACK)	Notes (ASTS) Request	Response (ARAR	Judgments (AJDG)	-
Work Effort (AWEF)	Complaint (ACPT)	Dispute (ADIS)					
							_
Import				-			n la
Placement (CPLC)	Payments (CPAY) R	ecall (CRCL) Demo				ST) Deceases (CDEC)	-
			Equipme	nt (CEQP) Request/Res	ponse (CRAR) Ba	inkruptcies (CBKP)	
Judgments (CJDG)	Complaint (CCPT)	Dispute (CDIS)					
		0 %		import 👹	File		
					🚽 Save	Cancel 🧭 /	loply

- 3. In the **Export** section, click **Post Dated Transactions (APDT)**. The **Save As** dialog box appears.
- 4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
- 5. Click **OK**.

Export Reconciliation Data

Use the **Process** tab in the **Client Configuration** window to export account data for all accounts that the client placed with your organization.

To export reconciliation data

			Client Co	onfiguration						×
Client Name			My Agency Id	0 ÷	AIM Client	Version	8.2.*	•		
🗂 Usin	ng Alpha Code In File Names		My Alpha Code							
18	History		Status and I	Notes (ASTS)				Payments		
	Final Recall			Statuses		3		Process		-
	General		Pla	cement				Pending Rec	call .	4 4
Description	ABC Agency									
Contact Name										
Phone	555-555-5555						_			
Email	aadams@abcagency.com						_			
Address	1000 Main St.						_			
Address	Jacksonville, FL 32256									
Last Received		_	Last Sent							
Placement		~	Recall Objection			-	Complaint			~
Pending Recall		~	Payment			* *	Dispute	Ē		~
Final Recall		v	Demographic			-				
Payment		~	Close			* *				
Demographic		-	Bankruptcy			v				
Notes		¥	Deceased			~				
Misc Extra Data		~	Reconciliation			•				
Equipment			RequestResponse	•						
Request/Response		V	Acknowledgment			~ ~				
Judgment		¥	Asset			v				
Deceased		~	Judgment							
Bankruptcy		¥	Status/Notes			~				
Complaint		~	Activity Notes			v v				
Dispute		~	Work Efforts			×				
							_			
							H	Save	🐹 Cancel	🖉 Apply

			Client Configurat	on)
lient Name		My	Agency Id 0	AIM Client Version	8.2.*		
🗂 Using /	Alpha Code In File Names	My	Alpha Code				
8	History		Status and Notes (AST	5	Payn	vents	
	Final Recall	0	Close Statuses	(G		ocess	1 🔺
Export	General		Placement		Pending	g Recall	Ψv
Payments (APAY)	Demographics (ADEM)	Reconciliation (AREC	Deceases (ADEC)	Bankruptcies (ABKP)	Assets (AAST)	Activity Notes (ANOT)	
Closes (ACLS)	Post Dated Transaction	ons (APDT) Acknow	viedgments (AACK)	Notes (ASTS) Request	Response (ARAR	Judgments (AJDG)	-
Work Effort (AWEF)	Complaint (ACPT)	Dispute (ADIS)					
Import			1		1	1	a là
Placement (CPLC)	Payments (CPAY)	Recall (CRCL) Demo				ST) Deceases (CDEC)	
			Equipmer	t (CEQP) Request/Res	ponse (CRAR) Ba	inkruptcies (CBKP)	
Judgments (CJDG)	Complaint (CCPT)	Dispute (CDIS)					
		0%		import i	File		
							- 1
							- 1
						Cancel	
					🚽 Save	Cancel 🧭	Apply

- 3. In the Export section, click Reconciliation (AREC). The Save As dialog box appears.
- 4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
- 5. Click **OK**.

Export Requests and Responses

Use the **Process** tab in the **Client Configuration** window to export responses to account placement requests that your organization received from the client.

To export requests and responses

			Client Co	onfiguration						×
Client Name			My Agency Id	0 ÷	AIM Client	Version	8.2.*	•		
🗂 Usin	ng Alpha Code In File Names		My Alpha Code							
18	History		Status and I	Notes (ASTS)				Payments		
	Final Recall			Statuses		3		Process		-
	General		Pla	cement				Pending Rec	call .	4 4
Description	ABC Agency									
Contact Name										
Phone	555-555-5555						_			
Email	aadams@abcagency.com						_			
Address	1000 Main St.						_			
Address	Jacksonville, FL 32256									
Last Received		_	Last Sent							
Placement		~	Recall Objection			-	Complaint			~
Pending Recall		~	Payment			* *	Dispute	Ē		~
Final Recall		v	Demographic			-				
Payment		~	Close			* *				
Demographic		-	Bankruptcy			v				
Notes		¥	Deceased			~				
Misc Extra Data		~	Reconciliation			•				
Equipment			RequestResponse	•						
Request/Response		V	Acknowledgment			~ ~				
Judgment		¥	Asset			v				
Deceased		~	Judgment							
Bankruptcy		¥	Status/Notes			~				
Complaint		¥	Activity Notes			v v				
Dispute		~	Work Efforts			×				
							_			
							H	Save	🐹 Cancel	🖉 Apply

Image: Control of the state My Alpha Code Image: Control of the state My Alpha Code Image: Control of the state Payments Image: Final Recall Close Statuses Image: Control of the state Image: Control of the state				Client Configurati	on			×
History Status and Notes (ASTS) Payments General Pacoment Pending Becall Payments (APAY) Demographics (ADEM) Reconciliation (APEC) Decesses (ADEC) Barknuptcies (ABKP) Assets (AAST) Activity Notes (ANDT) Close (ACLS) Post Dated Transactions (APDT) Acknowledgments (AACK) Notes (ASTS) Request/Response (ARAR) Judgments (AJDG) Work Effort (AIVEP) Complaint (ACPT) Dispute (ADIS) Import Payments (CPLC) Payments (CPLAY) Recall (CRCL) Demographics (CDEM) Misc Extra (CMIS) Notes (CNOT) Assets (CAST) Decesses (CDEC) Import Payments (CPLQ) Payments (CPLQ) Despute (CDIS) Import File Judgments (CJDG) Complaint (CCPT) Dispute (CDIS) Import File Import File	lient Name		My	Agency Id 0	+ AIM Client Version	8.2.*		
Prind Recall Close Datuses Process Sepoil Peeding Recall Peeding Recall Payments (APAY) Demographics (ADEM) Reconciliation (AREC) Decesses (ADEC) Barkruptcies (ABKP) Assets (AAST) Activity Notes (ANOT) Closes (ACLS) Post Dated Transactions (APDT) Acknowledgments (AACX) Notes (ASTS) Request/Response (ARAR) Judgments (AJDG) Viok Effort (AIVEP) Complaint (ACPT) Dispute (ADIS) Misc Extra (CMLS) Notes (CNOT) Assets (CAST) Decesses (CDEC) Import Payments (CPLQ) Payments (CPAY) Recall (CRCL) Demographics (CDEM) Misc Extra (CMLS) Notes (CNOT) Assets (CAST) Decesses (CDEC) Judgments (CJDG) Complaint (CCPT) Dispute (CDIS) Import File Import File 0 % Import File Import File Import File Import File	🗂 Using A	Ipha Code In File Names	My	Alpha Code				
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- 3. In the Export section, click Request/Response (ARAR). The Save As dialog box appears.
- 4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
- 5. Click **OK**.

Export Status Notes

Use the **Process** tab in the **Client Configuration** window to export status changes notes your organization added or updated for accounts that the client placed with your organization.

To export status notes

			Client Co	onfiguration				
Client Name			My Agency Id	0 ÷	AIM Client Versi	on 8.2.*	-	
🗌 Usin	g Alpha Code In File Names		My Alpha Code					
0	History		Status and	Notes (ASTS)			Payments	
	Final Recall			e Status es	3		Process	
	General		Pla	cement			Pending Recall	
Description	ABC Agency							
Contact Name								
Phone Phone	555-555-5555							
Email								
	aadams@abcagency.com 1000 Main St.							
Address	Jacksonville, FL 32256							
Last Received		_	Last Sent					
Placement		~	Recall Objection		¥	Complaint	t	*
Pending Recall		~	Payment		v V	Dispute		¥
Final Recall			Demographic		~			
Payment		*	Close		¥			
Demographic		-	Bankruptcy		*			
Notes		¥	Deceased		v.			
Misc Extra Data		~	Reconciliation		v v			
Equipment		~	RequestResponse		¥			
Request/Response	3	~	Acknowledgment		¥			
Judgment		¥	Asset		V			
Deceased		~	Judgment		~			
Bankruptcy		~	Status/Notes		¥			
Complaint		~	Activity Notes		v v			
		V	Work Efforts		v .			
Dispute					5C			

			Client Configura	ation		
ent Name			My Agency Id 0	AIM Client Versio	n 8.2.* 💌	
🕅 Using A	Ipha Code In File Names		My Alpha Code			
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	Final Recall General		Close Statuses	(@		ocess
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Payments (APAY)	Demographics (ADEM)	Reconciliation (AP	EC) Deceases (ADEC) Bankruptcies (ABKP)	Assets (AAST)	Activity Notes (ANOT)
Closes (ACLS)	Post Dated Transaction	s (APDT) Ack	nowledgments (AACK)	Notes (ASTS) Reque	st/Response (ARAR	Judgments (AJDG)
Work Effort (AWEF)	Complaint (ACPT)	Dispute (ADIS)	1			
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			Equips	nent (CEQP) Request Re	rsponse (CRAR) Bi	inkruptcies (CBKP)
Judgments (CJDG)	Complaint (CCPT)	Dispute (CDIS)				
		0%		impor	tFile	
						Cancel & Acoly

- 3. In the **Export** section, click **Notes (ASTS)**. The **Save As** dialog box appears.
- 4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
- 5. Click **OK**.

Export Work Effort

Use the **Process** tab in the **Client Configuration** window to export work efforts that your organization added or updated for accounts that the client placed with your organization.

To export status notes

			Client Co	onfiguration						×
Client Name			My Agency Id	• ÷	AIM Client	Version	8.2.*	•		
🗂 Usin	g Alpha Code In File Names		My Alpha Code							
19	History		Status and I	Notes (ASTS)				Payments		
	Final Recall			: Status es		3		Process		-
	General		Pla	cement				Pending Reci	all	4 4
Description	ABC Agency									
Contact Name										
Phone	555-555-5555									
Email	aadams@abcagency.com						_			
Address	1000 Main St.						_			
Address	Jacksonville, FL 32256									
Last Received		_	Last Sent							
Placement		~	Recall Objection			-	Complaint			~
Pending Recall		V V	Payment			v v	Dispute			~
Final Recall		Ψ.	Demographic			-				
Payment		*	Close			* *				
Demographic		$\mathbf{\vee}$	Bankruptcy			v				
Notes		¥	Deceased			¥				
Misc Extra Data		~	Reconciliation			•				
Equipment			RequestResponse	P						
Request/Response		-	Acknowledgment			~				
Judgment		~	Asset			-				
Deceased		~	Judgment							
Bankruptcy		~	Status/Notes			¥				
Complaint		V	Activity Notes			~				
Dispute		~	Work Efforts			-				
-						_				
							H	Save	🐹 Cancel	🖉 Apply

			Client Configuration	1			×
Client Name		My A	gency Id 0	AIM Client Version	8.2.*		
Using A	lpha Code In File Names	My A	Ipha Code				
18	History		Status and Notes (ASTS)		Payro	ents	
	Final Recall				Process		
Export	General		Placement		Pending	Recall	ΨΨ
Payments (APAY)	Demographics (ADEM)	Reconciliation (AREC)	Deceases (ADEC)	Bankruptcies (ABKP)	Assets (AAST)	Activity Notes (ANOT)	1
Closes (ACLS)	Post Dated Transaction	s (APDT) Acknowle	dgments (AACK) Not	es (ASTS) Request/F	Response (ARAR	Judgments (AJDG)	1
Work Effort (AWEF)	Complaint (ACPT)	Dispute (ADIS)					
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Import							
Placement (CPLC)	Payments (CPAY)	ecall (CRCL) Demogr				ST) Deceases (CDEC)	1
			Equipment (CEQP) RequestResp	onse (CHAR) Bar	nkruptcies (CBKP)	
Judgments (CJDG)	Complaint (CCPT)	Dispute (CDIS)					
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					S. Oake		1001

- 3. In the **Export** section, click **Work Effort (AWEF)**. The **Save As** dialog box appears.
- 4. Click the folder to save the export file to and then click **Save**. A notification dialog box appears.
- 5. Click **OK**.