



Latitude Management Suite Extension Wizard

Printable Help

Version 12.0

Last updated October 23, 2018

Abstract

This document is a printable version of Latitude Management Suite Extension Wizard help.

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Introduction to Latitude Management Suite Extension Wizard

Latitude Management Suite Extension Wizard allows you to update batches of accounts. With the appropriate permissions, you can do the following:

- Change the account's customer code on a batch of business.
- Update the system month and year for a batch of payment or reversal transactions.
- Update the fee schedule (master.feecode) on a batch of accounts.
- Update restricted access for a batch of accounts.
- View a history of updates.

Log on to Latitude Management Suite Extension Wizard

Use the **Latitude Login** dialog box to log on to Latitude Management Suite Extension Wizard.

To log on to Latitude Management Suite Extension Wizard

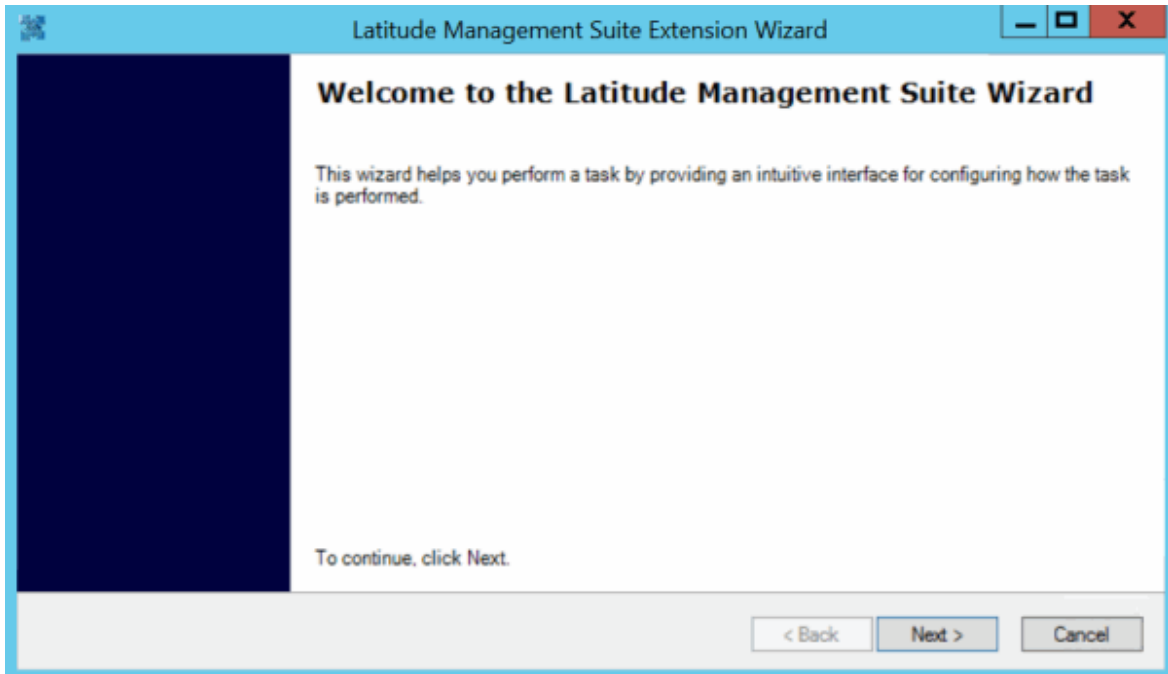
1. Open "\Program Files (x86)\Interactive Intelligence\Interaction Collector\bin."
2. Double-click "LatitudeManagementSuiteExtensionWizard.exe." The **Latitude Login** dialog box appears.

User Name: Your Latitude user name.

Password: Your Latitude password. As you type your password, the system displays periods instead of the typed characters.

Note: To log on using Windows authentication, select the Log in using Windows authentication check box and provide your Windows user name and password.

3. Complete the information and then click **Okay**. The **Latitude Management Suite Extension Wizard** page appears.



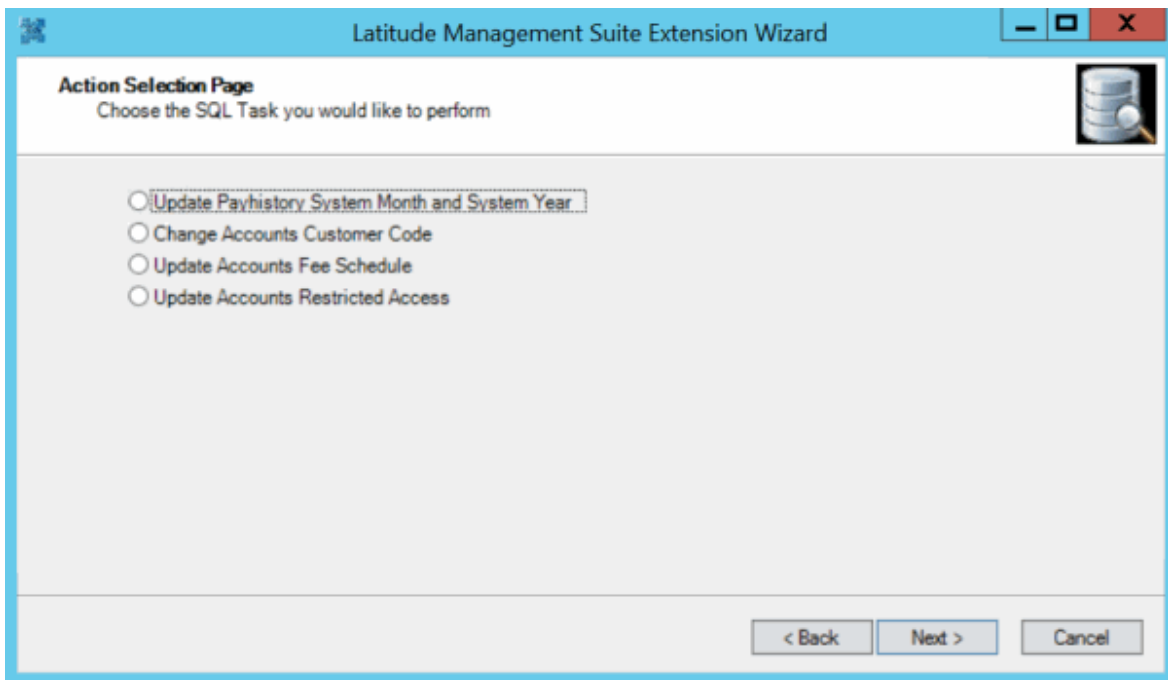
4. Click **Next**.

Select the Task to Process

Use the **Action Selection** page to specify the task you want the wizard to process.

To select the task to process

1. Ensure that you are on the **Action Selection** page.



Update Payhistory System Month and System Year: If selected, updates the system month and year for a batch of payment or reversal transactions. This task does not update the system month and year on linked payments; only the payments captured in the query.

Change Accounts Customer Code: If selected, changes an account's customer code on a batch of business.

Update Accounts Fee Schedule: If selected, updates the fee schedule (master.feecode) on a batch of accounts.

Update Account Restricted Access: If selected, updates the restricted access settings for a batch of accounts.

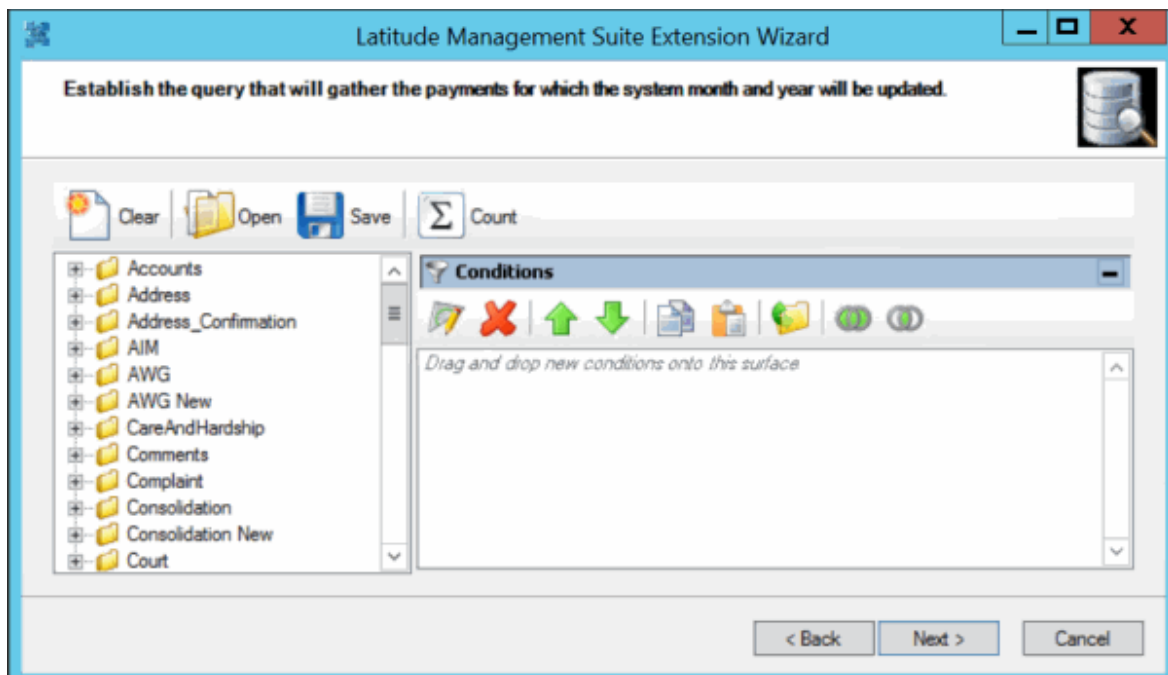
2. Click the task to process and then click **Next**.

Create Query to Select Accounts

Use the **Query** page to create a query to select the accounts you want the wizard to process.

To create a query to select accounts

1. Ensure that you are on the **Query** page.



2. Open an existing query or specify the conditions for a new query and then click **Next**.

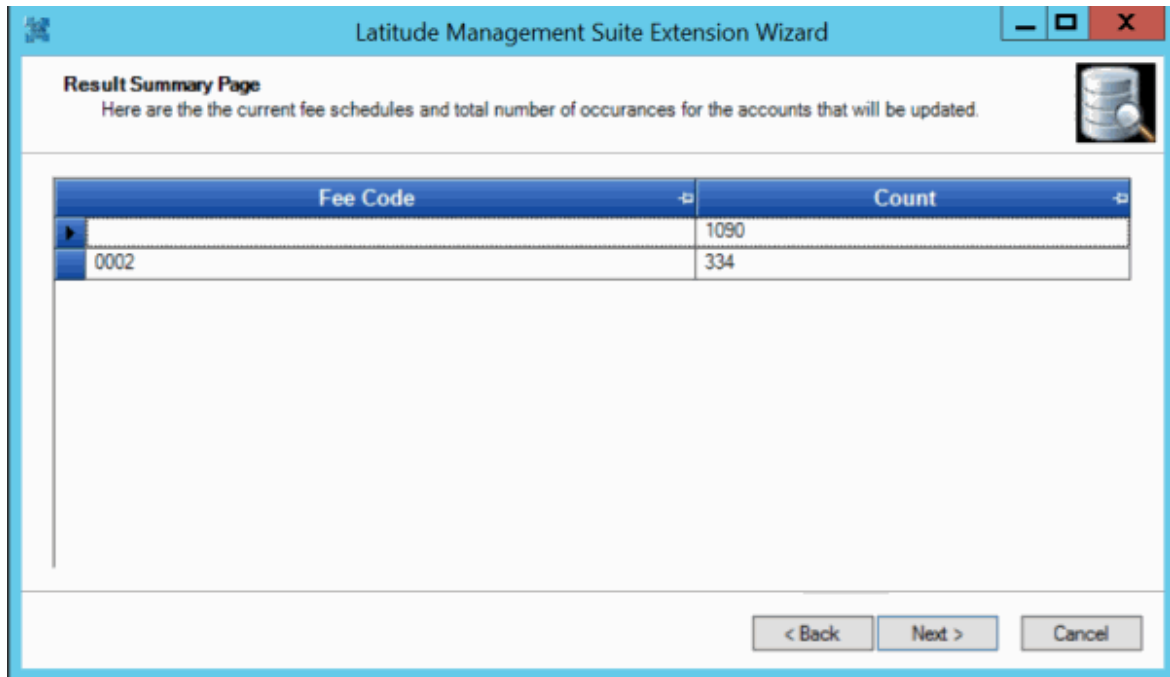
Note: For more information about using queries, see "Queries" in the *Latitude* documentation.

View Query Results Summary

Use the **Result Summary** page to view the number of accounts selected for processing, and other summary information. The information that displays on this page depends on the task you selected in a previous step.

To view query results summary

1. Ensure that you are on the **Result Summary** page. The following example shows the information that displays for the Change Accounts Restricted Access task.



2. After reviewing the results, do one of the following:
3. To modify the query, click **Back**.
4. To continue to the next page, click **Next**.

Processing Parameters

Processing Parameters

Use the **Parameter** page to specify the parameters for processing accounts. The information that displays on this page depends on the task you selected in a previous step.

Specify Parameters for Updating System Month and Year

If you selected the **Update Payhistory System Month and System Year** option on the **Action Selection Page**, specify the parameters for updating the system month and year for a batch of payment or reversal transactions.

To specify parameters for system month and year

1. Ensure that you are on the **Parameter** page.

System Month: Month to which to set the payment transactions.

System Year: Year to which to set the payment transactions.

2. Specify the system month, system year, or both and then click **Next**.

Specify Parameters for Changing Customer Codes

If you selected the **Change Accounts Customer Code** option on the **Action Selection Page**, specify the parameters for changing the customer code on a batch of business.

To specify parameters for customer codes

1. Ensure that you are on the **Parameter** page.

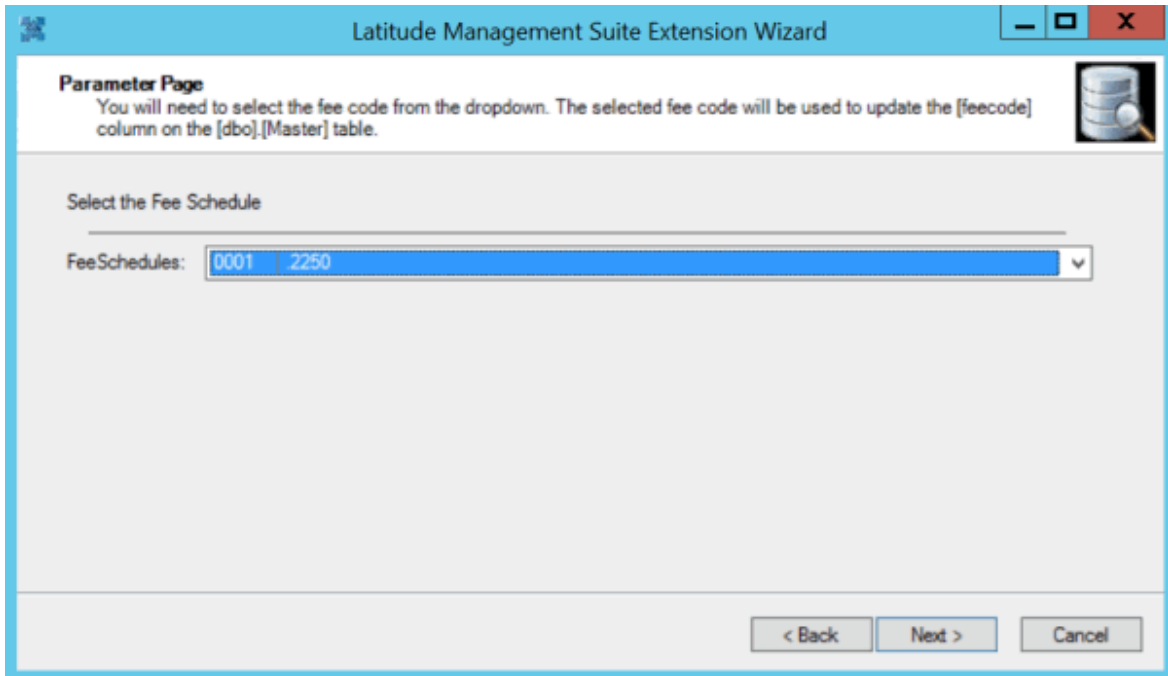
2. In the **Customers** list box, click the customer to assign and then click **Next**.

Specify Parameters for Updating Fee Schedules

If you selected the **Update Accounts Fee Schedule** option on the **Action Selection Page**, specify the parameters for updating the fee schedule on a batch of accounts.

To specify parameters for fee schedules

1. Ensure that you are on the **Parameter** page.



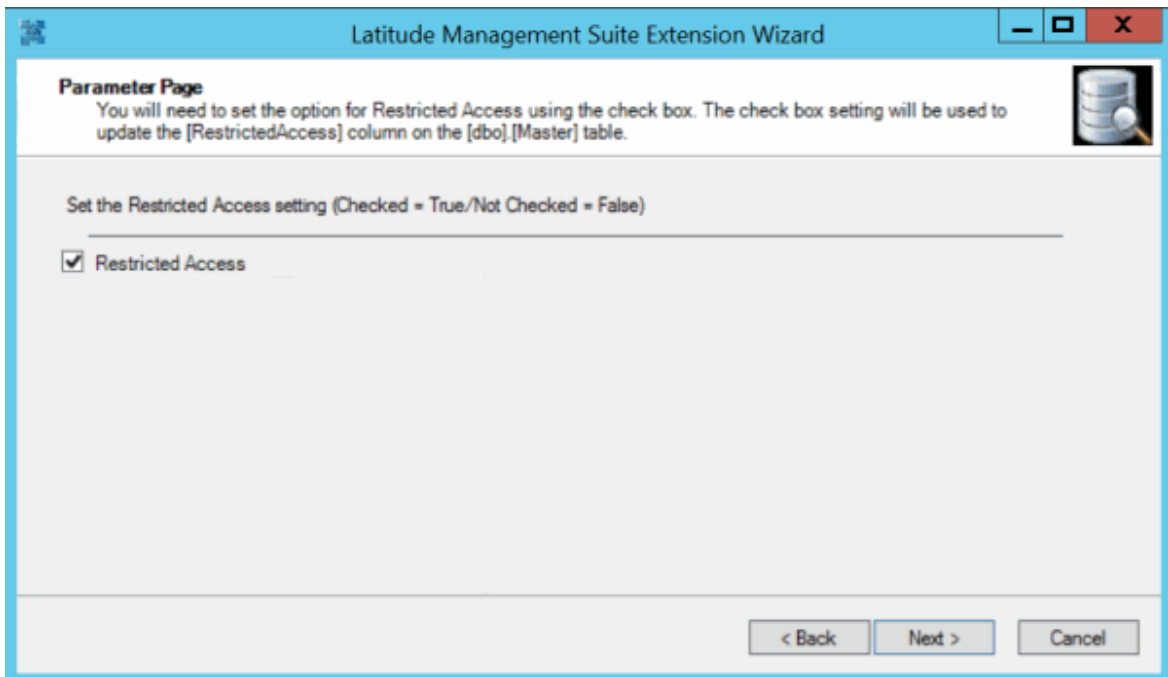
2. In the **Fee Schedules** list box, click the fee schedule to apply and then click **Next**.

Specify Parameters for Updating Restricted Access

If you selected the **Update Accounts Restricted Access** option on the **Action Selection Page**, specify the parameters for updating restricted access for a batch of accounts.

To specify parameters for restricted access

1. Ensure that you are on the **Parameter** page.



Restricted Access: If selected, only users with the Restricted Access Accounts permission can view the accounts. If cleared, all users can view the accounts.

2. Select or clear the **Restricted Access** check box and then click **Next**.

Process the Accounts

Use the **Processing** page to process the accounts you selected in the query based on the specified task and parameters. The information that displays on this page depends on the task you selected in a previous step.

To process the accounts

1. Ensure that you are on the **Processing** page.

Affected Database Objects and Actions

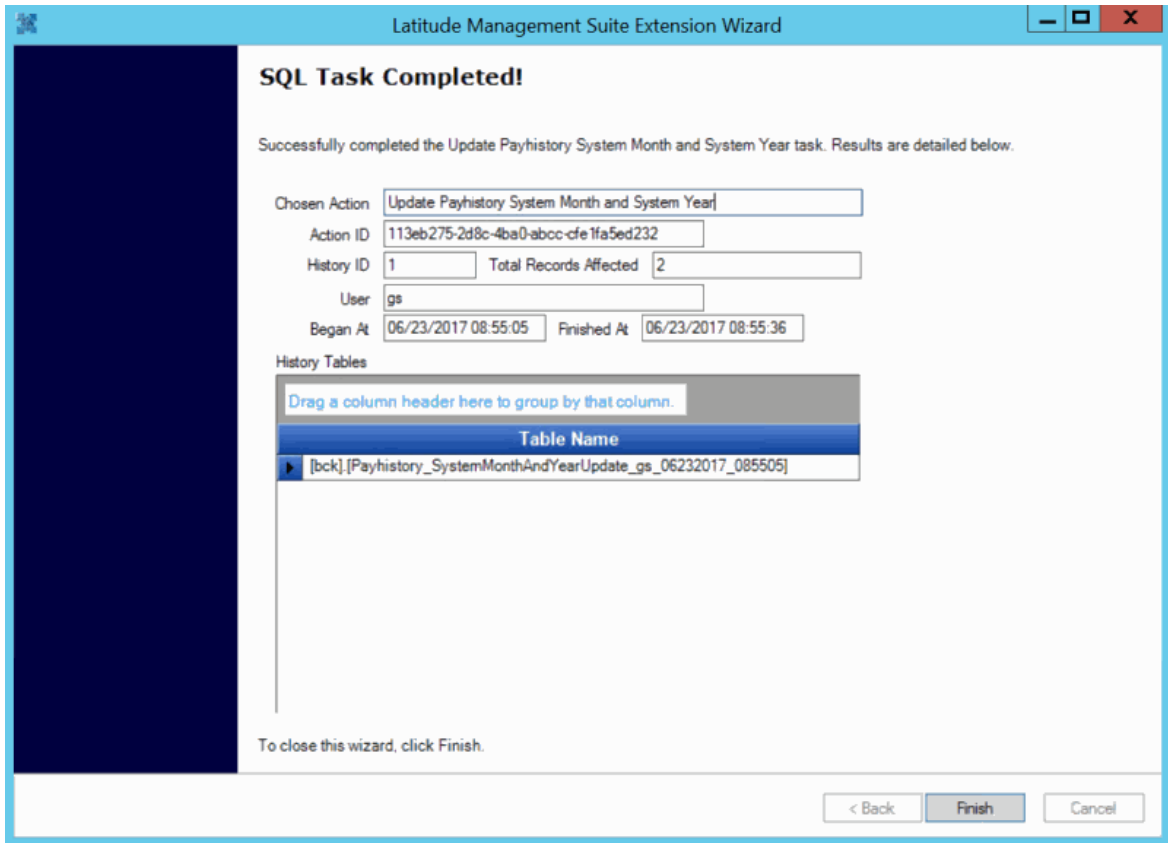
Drag a column header here to group by that column.

Database Object	Affected Records	Action Taken
[dbo].[Notes]	15	Deleted and Inserted into [bck].[Notes_Remove_gs_06232017_084958] for Archiving
[dbo].[MiscExtra]	24	Deleted and Inserted into [bck].[MiscExtra_Remove_gs_06232017_084958] for Arch
[dbo].[extradata]	0	Deleted and Inserted into [bck].[ExtraData_Remove_gs_06232017_084958] for Arch
[dbo].[Bankruptcy]	0	Deleted and Inserted into [bck].[Bankruptcy_Remove_gs_06232017_084958] for Arch
[dbo].[Deceased]	0	Deleted and Inserted into [bck].[Deceased_Remove_gs_06232017_084958] for Arch
[dbo].[Payhistory]	2	Deleted and Inserted into [bck].[Payhistory_Remove_gs_06232017_084958] for Arch
[dbo].[debtor_assets]	0	Deleted and Inserted into [bck].[debtor_assets_Remove_gs_06232017_084958] for Arch
[dbo].[LetterRequestRecipient]	0	Deleted and Inserted into [bck].[LetterRequestRecipient_Remove_gs_06232017_084958] for Arch

Perform Task

< Back Next > Cancel

2. Review the information and then click **Perform Task**. When the wizard finishes processing the task, the **SQL Task Completed** page appears.



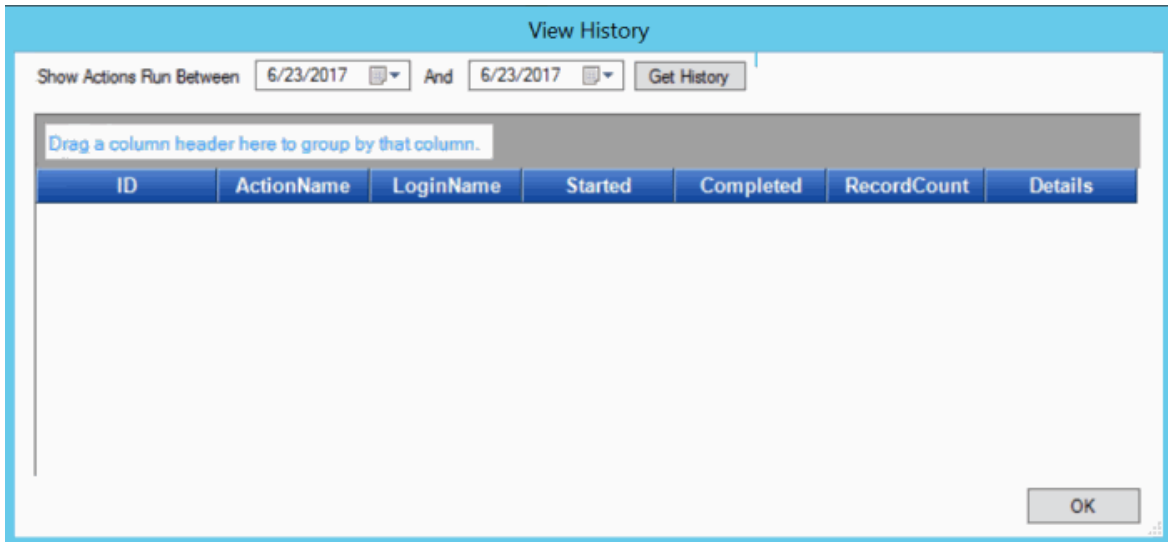
3. Click **Finish**. The **Welcome** page appears.
4. To close the wizard, click **Cancel**.

View History

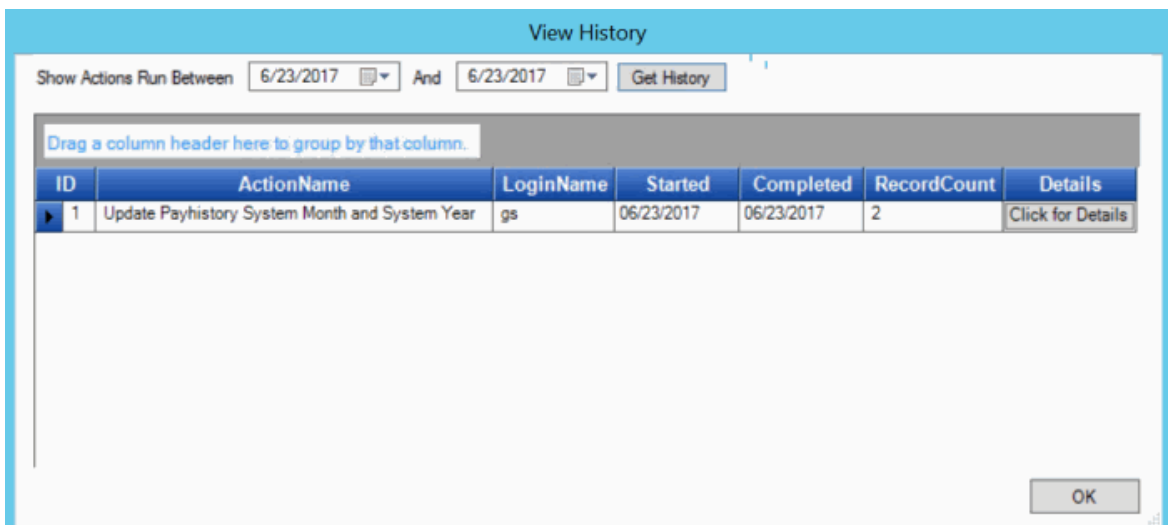
You can view a history of account updates your organization processed using the Latitude Management Suite Extension Wizard.

To view history

1. On the **Welcome** page of the wizard, click **Show History**. The **View History** dialog box appears.



- Specify the processing date range for which to display history and then click **Get History**. Actions that the system processed during the specified date range appear in the data grid.



ID: Code that identifies the historical record.

ActionName: Action the wizard ran against the accounts.

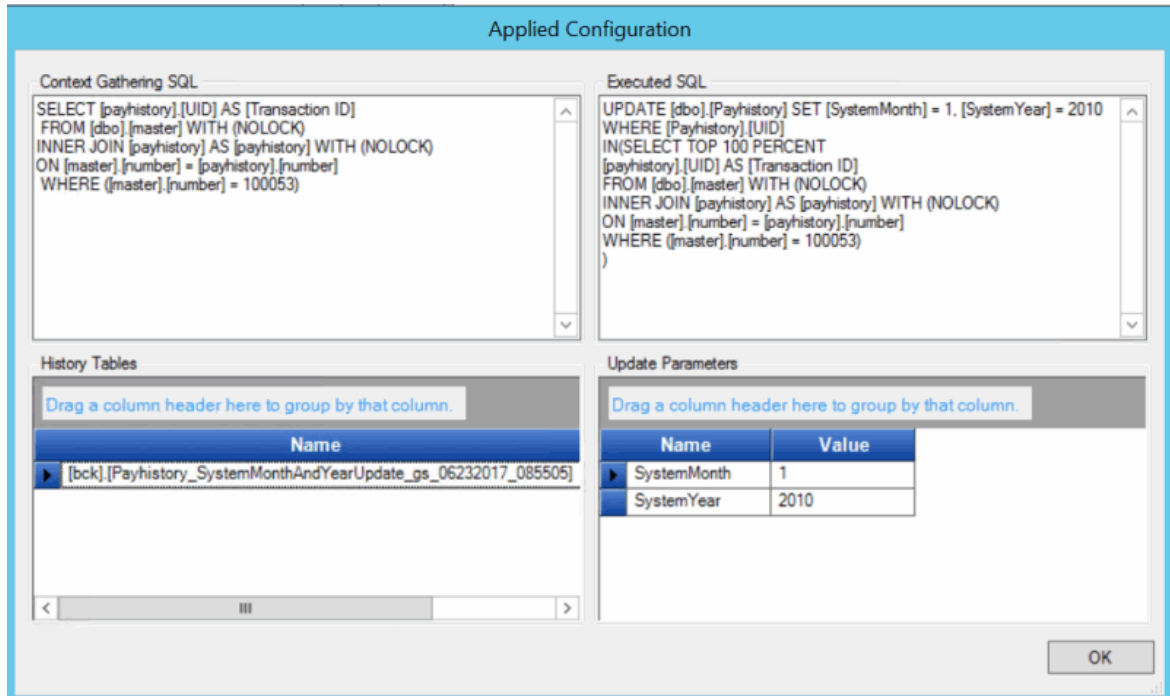
LoginName: ID of the user who ran the wizard.

Started: Date the wizard started processing the accounts.

Completed: Date the wizard finished processing the accounts.

RecordCount: Number of records the system processed.

- To group data, click the column heading and drag it to the place indicated.
- To view details for an action, in the Details column, click **Click for Details**. The **Applied Configuration** dialog box appears.



Context Gathering SQL: SQL code the system used to select accounts for processing.

Executed SQL: SQL code the system used to process accounts.

History Tables: Tables the system updated when processing accounts

Update Parameters: Parameters the system used to process accounts.

- To group the history tables or parameters, click the column heading and drag it to the place indicated.
- When finished viewing the information, click **OK**.