



LATITUDE SOFTWARE  
AN INTERACTIVE INTELLIGENCE COMPANY

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## New Features for:

**Release:**Latitude 12.0 SU 12  
**Built on:**07-Nov-2018

## New features included in release 12.0 SU 12

The table below summarizes the new features added in this release

SCR	Description/Details
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### Component: Credit Bureau Reporting

LAT-9772	<p><b>With the Credit Bureau Reporting Wizard the generated file or files could be picked up and sent before the processing completed. This caused an issue when an error occurred before completion of processing and the user either ignored error or didn't wait for the process to error out and then sent the files to credit reporting agencies anyway.</b></p> <p>The generated files are created in a temporary location and then moved to the user selected folder after completion of the entire process. We also added additional logging so that when an error occurred the generated log file could be used to view the error information.</p>
LAT-9503	<p><b>Minor changes around how amount past due and charge off amount are reported. Mostly only affects 1st party.</b></p> <p>If Bankruptcy is discharged then amountPastDue is 0.00 (regardless of industry or chargeoff).</p> <p>If Bankruptcy is petitioned and chapter 12 or 13 then amountPastDue is 0.00 (regardless of industry or chargeoff).</p> <p>If Status is not chargeoff status (64 or 97) then ChargeOffAmount is by definition 0.00.</p> <p>If status is current (11) then amountPastDue is by definition 0.00.</p>
LAT-9447	<p><b>On the cbr panel, when an action is taken that requires the account to be re-evaluated, the automated evaluation call takes to long to run and disrupts the agents workflow.</b></p> <p>On the cbr panel, when an action occurs that requires the account be evaluated, then the pending status will show as "Needs Evaluation", and the evaluation routine will not automatically run. The user will need to click the Evaluate button if they require to see the current pending status.</p>

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### Component: Exchange

LAT-8991	<p><b>There was not an easy way to view stored procedures configured in Exchange clients.</b></p>
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You can now view the stored procedures for Exchange clients by double-clicking on the labels for each stored procedure.

- LAT-8990**      **Need to provide an echo-back locating example in Exchange.**  
An echo-back locating example in Exchange.has been added.

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### Component: Fusion

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**LAT-9607**

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### Component: Latitude

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- LAT-9784**      **Log files sometimes not created by default for an application such as cbrw.**  
The default is now to create a log file with trace level of Warning unless explicitly specified by config.

- LAT-9416**      **Adding an NSF flag to check payments.**  
Setting dbo.pdc.NSFCount to 1 when a check payment bounces.

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### Component: Letters

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- LAT-9792**      **Sent letters saved as rtf were consuming large amounts of space in some locations.**  
Sent letters are now saved as pdf which will likely save well over half the amount of space, and in some cases a lot more, depending on the letter.

- LAT-9702**      **Microsoft Word for mail merges had previously been replaced by Spire implementation. There were issues with the merging when using some macros embedded in letter templates.**  
Added option to use Microsoft Word for mail merges. This matches previous functionality before the implementation of the Spire changes. This also fixes an issue with embedding an image in emails using Word.

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### Component: Payment Vendor Gateway

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**LAT-9831**

- LAT-9616**      **New PVG Plugin for Payrazr**  
Implements CC and ACH. NOTE: Vendor requires TLS 1.2 connections. The PVG application pool will need to be running with .NET framework 4.0. Contact support for any questions or issues.

- LAT-9609**      **PVG Plugin for Elavon**  
Implements CC and ACH. NOTE: Vendor requires TLS 1.2 connections. The PVG application pool will need to be running with .NET framework 4.0. Contact support for any questions or issues.

- LAT-8832**      **Utility to migrate tokens from one payment vendor to another.**

Given a token map file by the new vendor, this utility automates migration of those tokens for a Latitude database.

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### Component: TUNA

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<b>LAT-9470</b>	<b>Update to TUNA to work with TLS 1.2</b> TransUnion is forcing all connections to use TLS 1.2. This update will allow TUNA to function correctly following that change.
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### All new features from prior releases

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

#### New features in release 12.0 SU 10

<b>SCR</b>	<b>Description/Details</b>
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### Component: AIM

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<b>LAT-8957</b>	<b>Adding additional logging to AIM</b> Added the ability to log any errors you receive on importing a file (mostly for PGP decryption errors). These errors will now be stored in the batch file history table and will be view-able in the agencies history in AIM.
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### Component: Credit Bureau Reporting

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<b>LAT-8962</b>	<b>Optional credit bureau reporting of compliance condition changed from one time reporting to everytime reporting.</b> the compliance condition code in the credit bureau report is reported for as long as it is valid.
<b>LAT-8904</b>	<b>Altering Custodian configured CBR task steps to include a new procedure cbrForceDeletesByStatus.</b> The cbrForceDeletesByStatus procedure will determine all accounts in a status configured to report a DA/delete to the Bureaus and update the account respectively.
<b>LAT-8736</b>	<b>The cbrAccountHistory function has been altered to take into account any deletes on the account that have occurred preceding the original or last initiated Dispute. When the account has last been deleted the function will return an account that is not is dispute. This will allow the account to once again be reported as a dispute provided the Agency has vetted the data.</b> The cbrResetCbrPrevent procedure will need to be executed prior to the bulk evaluation in Custodian. The first run will clear the cbrPrevent flag for qualifying accounts. The evaluation will then repopulate the cbr_accounts table which would then have the compliance condition set by the second or post execution of the procedure named cbrForceDisputesByStatus.

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### Component: Exchange

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<b>LAT-8883</b>
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**LAT-8866**      **You cannot map to IsAuthorized for the debtors table in Exchange.**  
You can now map to IsAuthorized for the debtors table in Exchange.

**LAT-8853**      **When importing an address in Exchange if the Address has the IsCorrespondence flag set to true other addresses for the debtor(s) should be updated such that that flag is false.**  
Now when importing an address in Exchange if the Address has the IsCorrespondence flag set to true the other addresses for the debtor(s) will be updated such that that flag is false.

### Component: Fusion - Plugin

**LAT-8762**      **Updating Innovis Collection Bundle version.**  
This adds the "collection score mapping" functionality. This includes additional debtor scoring and phone grading information from the vendor.

### Component: Latitude

**LAT-8902**      **Compliance was missing in version 10.**  
Compliance panels are now present in version 10.

### Component: Payment Vendor Gateway

**LAT-8832**      **Utility to migrate tokens from one payment vendor to another.**  
Given a token map file by the new vendor, this utility automates migration of those tokens for a Latitude database.

## New features in release 12.0 SU 9

SCR	Description/Details
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### Component: Credit Bureau Reporting

**LAT-8828**      **New CBR Exception Fields**  
CbrException is now deprecated in the Master and debtors tables. The new field for exceptions is named CbrExceptions32.

### Component: Custodian

**LAT-8830**      **Added a custodian task to allow users to schedule spSetArrangementInactiveForClosedAccounts**

### Component: Latitude

**LAT-8847**      **Deprecated Collection Cost Mode of Current Balance**  
Removed Collection Cost Mode: Current Balance. It has been deprecated. In lieu of

Current Balance you should use Current Gross, which is functionally equivalent but requires change to Collection Cost Pct and the fee schedule allocation %.

**LAT-8747 New Collection Cost mode of "Current Gross"**

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

**New features in release 12.0 SU 8**

**SCR Description/Details**

**Component: Credit Bureau Reporting**

**LAT-8746 Consolidate CBR configuration**

CBR Configuration in the Maintenance/Status Codes will be removed.

**LAT-8686 Show multiple exceptions**

Previous revision only showed one exception. Now all exceptions display.

**LAT-8679 Configuration added to CBR Config**

New checkbox added to CBR Config that allows ability to configure whether Closed & Returned accounts are deleted. It is only visible on the top layer, which makes it a system config.

**LAT-8651 Removed unused status codes. LAT-8754 Build further on this by replacing the dropdown with buttons.**

In the admin account form, the status dropdown now only contains two choices -- DA and DF

**Component: Latitude**

**LAT-8754 Remove and replace Account Status dropdown**

The Account Status dropdown has been removed and replaced with an uneditable textbox. Additionally, there will be two buttons added that allow the user to place the account in DF or DA status.

**LAT-8747 New Collection Cost mode of "Current Gross"**

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

**LAT-8580 Added Separate Direct invoice type**

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

**New features in release 12.0 SU 7**

SCR	Description/Details
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**Component: Credit Bureau Reporting**

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LAT-8686	<p><b>Show multiple exceptions</b></p> <p>Previous revision only showed one exception. Now all exceptions display.</p>
LAT-8679	<p><b>Configuration added to CBR Config</b></p> <p>New checkbox added to CBR Config that allows ability to configure whether Closed &amp; Returned accounts are deleted. It is only visible on the top layer, which makes it a system config.</p>
LAT-8653	<p><b>Remove "Report" button</b></p> <p>Real-time reporting in the CBR panel has been disabled.</p>
LAT-8652	<p><b>Delete account button should set specialnote to DA</b></p> <p>There is a delete account button on two forms in the CBR panel. These button actions need to be updated to set master.specialnote to "DA"</p>
LAT-8651	<p><b>Removed unused status codes. LAT-8754 Build further on this by replacing the dropdown with buttons.</b></p> <p>In the admin account form, the status dropdown now only contains two choices -- DA and DF</p>
LAT-8649	<p><b>Clarify CBR "Enabled" checkbox</b></p> <p>When configuring customer credit reporting, there is a checkbox which reads "Enable". In order to add clarity, this checkbox now reads "Reporting Enabled".</p>
LAT-8648	<p><b>Remove "Always use customer credit bureau settings, if assigned" option.</b></p> <p>In the CBR Console, the option for "Always use customer credit bureau settings, if assigned" is not used by backend process, so it has been removed from UI.</p>
LAT-8645	<p><b>Removed obsolete CBR configuration fields</b></p> <p>There are configuration options which are no longer relevant for statuses as the reporting conditions are now driven by root data. All configuration columns have been removed with the exception of "Report", "PIF" and "SIF".</p>
LAT-8644	<p><b>CBR Wizard can create test file</b></p> <p>My indicating in the CBR Wizard that a test file is to be created, customers can rerun the CBR report without altering history. The test file cannot be submitted to a bureau.</p>

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**Component: Fusion**

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LAT-8538	<p><b>New plugin added to Fusion.</b></p> <p>Experian TrueTrace added as a new service featured on Fusion.</p>
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**Component: Latitude**

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LAT-8615	<p><b>Could not read long extra data values after lengthening field to 128 chars.</b></p>
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Add the extradata value to the tooltip

**LAT-8580**

**Added Separate Direct invoice type**

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

**Component: Payment Vendor Gateway**

**LAT-8524**

**The Transaction ID of principal transactions is now noted on surcharge transactions**

transactions marked as Principal have their succeed Transaction ID value temporarily stored, and follow-up transactions marked as Surcharge, for the same ScheduledPayment have the Reference include that Transaction ID value.

**New features in release 12.0 SU 6**

**SCR**

**Description/Details**

**Component: Payment Vendor Gateway**

**LAT-8524**

**The Transaction ID of principal transactions is now noted on surcharge transactions**

transactions marked as Principal have their succeed Transaction ID value temporarily stored, and follow-up transactions marked as Surcharge, for the same ScheduledPayment have the Reference include that Transaction ID value.

**New features in release 12.0 SU 5**

**SCR**

**Description/Details**

**Component: Latitude**

**LAT-8429**

**Added option to pay oldest A/R first to Invoices application**

In the Invoices applications options dialog, there is a new checkbox for paying the oldest A/R first. If selected then monies owed client will be applied towards oldest invoice A/R.

**LAT-8368**

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

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

**LAT-8295**

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

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

**LAT-8163**

**J1 section added to Metro2**

In order to comply with the Metro2 credit reporting standard, J1 section has been added to credit report file.

**New features in release 12.0 SU 4****SCR****Description/Details**

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**Component: Exchange**

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<b>LAT-8347</b>	<b>CBRPrevent and CBROverride and not available to map to in Exchange MT Imports.</b> CBRPrevent and CBROverride are now mappable fields for Exchange MT Imports.
<b>LAT-8094</b>	<b>The ability to add a post C# script has been added to the Visual Exports in Exchange.</b> The ability to add a post C# script has been added to the Visual Exports in Exchange.
<b>LAT-8093</b>	<b>C# file pre-processing scripts are now compiled using the .NET 3.5 framework.</b> C# file pre-processing scripts are now compiled using the .NET 3.5 framework. The assemblies that can be referenced are: mscorlib.dll, System.dll, System.Data.dll, System.Xml.dll, System.Core.dll, System.Xml.Linq.dll , System.Data.DataSetExtensions.dll, GSSI.Latitude.Library.dll and GSS.Common.dll.

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**Component: Fusion**

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<b>LAT-8148</b>	<b>Adding additional codes to Segment 06 models for Experian Collection Advantage.</b> Adding additional codes to Segment 06 models.
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**Component: Fusion - Plugin**

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<b>LAT-8209</b>	<b>Adding Transunion TLO Fusion plugin</b> Includes new Fusion plugin for Transunion TLO.
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**Component: Install**

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<b>LAT-8355</b>	<b>Reporting Console help file is now available.</b> Added ReportingConsole.chm help file to the install.
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**Component: Latitude**

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<b>LAT-8409</b>	<b>Send email with results of Letter Writer with counts by letter code.</b> Request for itemized list of letter codes in letter file writer's e-mail body
<b>LAT-8389</b>	<b>Upgrade of MSXML to supported version.</b> Upgraded MSXML 4.0 to MSXML 6.0 to get on the supported version.
<b>LAT-8377</b>	<b>The C2KPayment entry was querying the database to find the next available batch number from the dbo.paymentbatches table.</b> The C2KPayment entry now uses the [dbo].[Sys_NextRef] with a series name of 'PaymentBatchNumber' to determine the next available batch number.



- LAT-8363 Letter Console currently uses DebtorBankInfo table. table has been replaced by WalletContact.**  
Use new WalletContact table.
- LAT-8329 Added features:**  
- SMTP to e-mail after letters are requested from Letter File Writer  
- SFTP option to send file to SFTP server after Letter File Writer  
Must copy WinSCP.exe and WinSCPnet.dll into \bin dir after ES install. Review LetterFile.exe.config to set correct settings for SMTP and SFTP.
- LAT-8295 New Word Merge fields are added to comply with New York Regulations.**  
New Word Merge fields added for New York State regulations compliance. Also, new panel is available for quick reference of values.
- LAT-8283 New Checkbox to allow a letter to be sent regardless of status of account.**  
Checkbox is an override forcing letter to be sent if it is checked. Has no bearing on account if unchecked.
- LAT-8267 Inconsistent date formats using the Overpayment Manager application**  
Some dates were showing as mm/dd/yyyy and others were showing as dd/mm/yyyy has been corrected.
- LAT-8262 Added Account Number to the Link grid in Payment Entry**  
We added the Account Number column to the Link grid right after the File Number column in the Payment Entry application.
- LAT-8215 The Reporting Console now respects the print orientation of a report over the print orientation of the default printer in the event that the report is sent straight to the printer, bypassing any preview mechanism.**  
The example that particularly brought this to light was sending invoices straight to the printer. The summary reports were landscape but were printing in portrait as per the default settings of the printer on the host machine.
- LAT-8197 Added ability to manually add payments into batches and process the batch.**  
This functionality was previously available in versions of Latitude prior to version 12 and before Interactive Collector Web Client.
- LAT-8173 Provide full letter functionality**  
Provide the same letter functionality in Collector that was previously available in Latitude.
- LAT-8163 J1 section added to Metro2**  
In order to comply with the Metro2 credit reporting standard, J1 section has been added to credit report file.
- LAT-8077 Adjust Linked payment Spread Option by adding sort order fields and forcing sort order fields to be driven by customer and displaying spread option screen forced by current user**  
Adjust Linked payment Spread Option by adding sort order fields and forcing sort order fields to be driven by customer and displaying spread option screen forced by current user.
- LAT-8057 Need ability to ignore errors and continue processing.**

Added attribute /e to command prompt list to ignore errors and continue processing

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## Component: Payment Vendor Gateway

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### **LAT-8404 The Transaction ID (Ref Num) of principal transactions is now noted on surcharge transactions**

transactions marked as Principal have their succeed RefNum value temporarily stored, and follow-up transactions marked as Surcharge, for the same ScheduledPayment have the Description include the RefNum value.

### **LAT-8371 Billing Tree PVG plugin did not support a different set of pin and securityToken values for a separate surcharge transaction.**

For Billing Tree we now support a second set of credentials for the surcharge transaction. There are new requirements for the vendor information strings.

### **LAT-8272 Add offset option to NACHA files**

Added Parameter fields:

include\_offset 1 bool set to "Y" to include offset row. No value to not include offset row.

fein 14 Company Id for offset row.

name 22 Name to assign to offset row. Default "OFFSET"

Sample Param:

Vendor Info Param1:

fileformat=NACHA|immdest=0810810818|immorig=0910910919|immdestnm=FELLS

NARGO|immorignm=FAKEIE

RECOVERY|cname=FRC|dfiid=08108108|companyid=1867530955|incoffset=Y|fein=41424344|name=OFFSET

### **LAT-8176 In order to give the option for an OFFSET record, the NACHA export tool has been modified to allow a Vendor Parameter switch to insert offset row.**

Added Parameter fields:

include\_offset 1 bool set to "Y" to include offset row. No value to not include offset row.

fein 14 Company Id for offset row.

name 22 Name to assign to offset row. Default "OFFSET"

Sample Param:

Vendor Info Param1:

fileformat=NACHA|immdest=0810810818|immorig=0910910919|immdestnm=FELLS

NARGO|immorignm=FAKEIE

RECOVERY|cname=FRC|dfiid=08108108|companyid=1867530955|incoffset=Y|fein=41424344|name=OFFSET

## **New features in release 12.0 SU 3**

<b>SCR</b>	<b>Description/Details</b>
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## Component: AIM

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### **LAT-8019 Currently using batching for financial transactions in AIM was contained in the config file.**

The configuration for batching when processing financial transactions has been moved such that it is configurable at the agency level.

### **LAT-8008 Processing payment files in AIM takes a very long time using the new endpoint that was created. A new feature is being added such that AIM can send transactions in batch to help with performance.**

There is a new option to process payment files in AIM using batching. This featured is 'turned on' by adding these settings to the AgencyManagerInterface.exe.config file:  
 -- the batching size. 50 is probably a decent starting point.

```
<add key="PaymentDirectBridgeWrapper.AIMBatchGroupSize" value="150"/>
```

-- If this value is not present or is something other than True then AIM will process transactions one by one.

```
<add key="AIM.UsePaymentBatching" value="True"/> If ths
```

### Component: AIM Receiver

- LAT-8015**      **Processing financial transactions in AIM Receiver takes a long time.**  
 The processing of financial transactions in AIM Receiver can now be batched. This helps with performance.

### Component: Custodian

- LAT-8017**      **Custodian task to clean up sole responsibility requests when there is no longer a valid arrangement on the account.**  
 This task will clean up all sole responsibility requests that are active and either pending approval or in an approved state that are for an account that no longer has a valid SIF or PIF arrangement.
- LAT-8011**      **Adding parameter to the schedulepaymentresultmerge custodian task**  
 @FirstPaymentDueGrace will equate to the number of days prior to the first due date that the payment will be accepted and counted toward the promise. The default is -31. The Client can change it to their specifications.

### Component: Exchange

- LAT-8042**      **Pre and Post file stored procedures in Exchange imports do not do anything other than log errors when one is encountered running these procs. These need to be seen as errors in the Import Process.**  
 Pre and Post file stored procedures in Exchange imports are now seen as errors when an exception is encountered when the proc is executed.
- LAT-8022**      **Currently the configuration of batching for financial transactions is contained in the config file.**  
 The configuration of batching financial transactions can now be configured at the individual Exchange client level.
- LAT-8006**      **Processing payments through Exchange takes a long time. This is going to be addressed by adding the ability to batch transactions.**  
 A new endpoint has been created in Collector to allow the batching of Exchange transactions.

### Component: Latitude

- LAT-8065**      **supports the use of letter templates**  
 Letter templates were added so that the users can define a data template to be used

for letter merging.

### New features in release 12.0 SU 2

SCR	Description/Details
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#### Component: Latitude

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**LAT-7811      Command line arguments have been added for Document Attacher**

"-locateaccountsby": Locate Accounts By  
 "-directorytoscan": Directory To Scan  
 "-regularexpression": Regular Expression  
 "-domovedocumentlocation": Do Move Attached Documents  
 "-errorlogdirectory": Error Log Directory  
 "-attachArchDir": Attachment Archive Directory  
 "-dosearchsubdirs": Search Sub Folders?  
 "-doesregexcontaincat": Does Contain Category Exp Locator?  
 "-docopydirstructure" : Copy Directory Structure?  
 "-dogeneratethumbnails": Do Generate Thumbnails?

"-dbserver": Db Data Source  
 "-dbcatalog": Db Initial Catalog  
 "-dbuser": Db UserName  
 "-dbpass": Db Password

"-latitudeusername": Latitude UserName  
 "-latitudepassword": Latitude Password

Note: Acceptable values for the flag arguments (usually starting w/ "Do" or "Does") should be "true" or "false"

### New features in release 12.0 SU 1

SCR	Description/Details
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#### Component: Latitude

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**LAT-7549      Added 2 columns to the linked accounts grid in payment entry.**

Added judgment date and case number to the linked accounts grid in payment entry.

**LAT-7498      Added ability to modify the order and hide available columns in linked accounts grid of Payment Entry.**

Added ability to modify the order and hide available columns in grid as well as persist the changes.

**LAT-7386      Added the alloc% field to fee schedule**

Added the ability to set a percentage of the payment remaining to be allocated towards a particular bucket.

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#### Component: Payment Vendor Gateway

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**LAT-7235      This plug in has been certified for information processing the Chase Paymentech for CC Processing only**

This plug in has been certified for information processing the Chase Paymentech for CC

Processing only

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**Component: Work Flow**

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**LAT-7802**

**Exclusion of DOE-specific Work Flow events**

Latitude Work Flow events specific to Department of Education processes have been excluded from the default installation.