.g-cw-icon{fill:#FF4F1F;}.g-cw-text{fill:#4E5054;}

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## SCR Summary for:

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

### Changes included in 3.0 SU 12

The table below summarizes the changes made for this release.

The "Device/Install Hint" after each SCR indicates the device and installs to run to apply updated code for that issue. See theDevice Install Hint page for details.

| SCR | Description/Details |
|-----|---------------------|

**Component: Administration Tool**

| LIQ-5656 | **Legal Case - Judgments issue with payments corrected.** |
|----------|-----------------|
| | The query obtaining the payhistory records was not using the judgment date. Corrected now, users will no longer see an error message on payments entered before the judgment date. |

**Component: Credit Bureau Reporting**

| LIQ-6642 | **The cbrBulkEvaluate_NoCursor routine has a bug where if you set the Debtors.IsAuthorizedAccountUser field to 1, it will generate a sql error due to inserting duplicate rows into the cbrExceptions table.** |
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| | This has been corrected with a change to the cbrEvaluateBulk_NoCursor stored procedure. |

| LIQ-6641 | **If user doesn't have dbo schema as default schema the cbrBulkEvaluate_nocursor fails.** |
|----------|-----------------|
| | If user doesn't have dbo schema as default schema the cbrBulkEvaluate_nocursor fails because the stored procedure creates temp tables under the wrong schema. The fix is to specify the schema in the table creation portion of the script. |

| LIQ-6593 | **Issue where CBRPanel takes well over a minute to open.** |
|----------|-----------------|
| | Updated cbrDataSummary related functions and indexes to eliminate extended load time. |

| LIQ-6078 | **In some cases, a blank DOB value will not be interpreted as null and so the account may be incorrectly included in the cbr report file.** |
|----------|-----------------|
| | For 2017 accounts are required to have a valid SSN or DOB before reporting to the consumer reporting agencies. There are cases with no SSN, and a value for DOB (1/1/1900) that is not correctly interpreted as null by the evaluation routine. The evaluation routine now correctly evaluates the DOB value as null when appropriate and will raise an exception if both DOB and SSN are blank. |

| LIQ-5984 | **Setting the primary debtors Date of Death value would show the account as reported Deceased on the Credit Bureau panel, prior to it actually being reported to the credit bureaus.** |
|----------|-----------------|
| | The account will not show as reported Deceased on the Credit Bureau panel until it is actually included in a file as deceased. |

| LIQ-5746 | **Minor changes around how amount past due and charge off amount are reported. Mostly only affects 1st party.** |
|----------|-----------------|
| | If Bankruptcy is discharged then amountPastDue is 0.00 (regardless of industry or chargeoff). If Bankruptcy is petitioned and chapter 12 or 13 then amountPastDue is 0.00 (regardless of industry or chargeoff). If Status is not chargeoff status (64 or 97) then ChargeOffAmount is by definition 0.00. If status is current (11) then amountPastDue is by definition 0.00. |

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### Component: Database

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| **LIQ-6747** | **When running dbupdate and selecting the custom mode, you would sometimes get the following error: System.NullReferenceException: Object reference not set to an instance of an object.** |
| | This has been corrected to catch the null reference and handle appropriately. |

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| **LIQ-6404** | **DBUpdate GUI did not refresh with the progress of update.** |
| | The GUI now updates in realtime with the progress of DBUpdate. |

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| **LIQ-6400** | **DBUpdate would sometimes get the following error caused by an issue with Redgate components: Unable to cast object of type 'RedGate.SQLCompare.Engine.Statistics' to type 'RedGate.SQLCompare.Engine.RelationalIndex'.** |
| | Added type checking to avoid this error. |

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| **LIQ-6226** | **Added Permission option to use Microsoft Word for editing template and merge printing for Letter Console. This matches previous functionality before the implementation of the Spire changes.** |

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| **LIQ-6068** | **Adding WebAccess account report that includes AIM details.** |
| | Added a default account report that you can switch to in the permissions, that shows basic agency details on placed accounts. |

| | |
|---|---|
| **LIQ-6061** | **Adding WebAccess account report that includes AIM details.** |
| | Added a default account report that you can switch to in the permissions, that shows basic agency details on placed accounts. |

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| **LIQ-5712** | **When using AIM if the agency version is 12 and you have the options turned off to send insurance in the placement file you will receive an error.** |
| | The error in AIM when creating a placement file for a version 12 client and insurance is not being sent has been corrected. |

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### Component: Infrastructure

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| **LIQ-5714** | **In some cases the proportional payment spread may not distribute the entire payment amount and results in an overpayment when accounts still have remaining balances.** |
| | In some cases the proportional payment spread may not distribute the entire payment amount and results in an overpayment when accounts still have remaining balances. |

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|---|---|
| **LIQ-5711** | **In AIM when processing payment file using batching the transactions need to be processed by the record order in the file. Previously this was processing adjustments first, then payments then PURs.** |
| | In AIM when processing payment file using batching the transactions need to be processed by the record order in the file. Previously this was processing adjustments first, then payments then PURs. |

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|---|---|
| **LIQ-5693** | **We need to make sure that when processing financial transactions in Exchange that they are processed in the order they are found in the source. Currently adjustments, payments then reversals are processed in a 'batch'.** |
| | We need to make sure that when processing financial transactions in Exchange that they are processed in the order they are found in the source. Currently adjustments, payments then reversals are processed in a 'batch'. |

**When setting up arrangements only the account that was selected when showing the**

**LIQ-5667**

**workform will calculate interest. Links will not calculate interest.**

All accounts when setting up arrangements will calculate interest if needed.

**LIQ-5593**

**When doing payment spreading through Exchange closed accounts can sometimes receive part of the payment.**

Closed accounts are now excluded when processing a payment through Exchange that will be spread.

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### Component: Liquid Center

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**LIQ-6743**

**Issues with surcharges on edit arrangements screen and toggling surcharges on/off corrected.**

Incorrect surcharges were loaded on certain payments when adding and replacing payment instruments using the wallet screen while editing existing payments on an arrangement. Additionally, toggling surcharges from off to on will now load the corresponding surcharge to the payment in question instead of incorrectly setting the surcharge to $0.00.

**LIQ-6729**

**Issue with incorrect queue levels being assigned on the last processed payment corrected.**

If an account had one remaining payment processed from the workform, along with a remaining balance, the queue level was set incorrectly on credit card payments. The correct queue level of 011 "No More Postdates" is now being correctly set in this situation.

**LIQ-6725**

**Issue with editing payment method on arrangements resolved.**

User should now be able to switch payment method on proposed arrangements successfully from the edit proposed arrangement screen.

**LIQ-6636**

**last updated date on the cbr panel didn't reflect changes to debtor information.**

The Last Update value is the greater of the cbr_account.LastUpdated and any related cbr_debtors records.

**LIQ-6635**

**LIQ-6231**

**NITD letters for CC's did not include Address information for the owner of the card.**

CC owner address is now available for NITD letters.

**LIQ-5811**

**Documentation Panel - correcting issue with pagination.**

Documentation panel was not fetching the data on paging. Issue has been corrected.

**LIQ-5748**

**LIQ-5739**

**Added new columns to the Medical Details Anchor.**

Added two new columns to the Medical Details Anchor:

Patient Name
Service Date

**LIQ-5738**

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

Account Navigator
Medical Account Details
Link Details

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

**LIQ-5730**

**Interest is being calculated to beyond 2 decimal places when it is a simple interest calculation. Interest calculated by the Latitude.Utilities.Interest is calculated to only 2 places.**

Interest is now calculated to 2 decimal places when it is a simple interest calculation.

**LIQ-5641**          **Closed Accounts will no longer load on demand.**

The user will click a button to load closed accounts on the linked letter dialog.

**LIQ-5582**

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### Component: Liquid Portal

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

Updated legacy ININ logos to new Genesys logos.

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

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

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

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

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

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

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

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

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

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

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

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

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

**All included changes from prior releases**

Below is the complete description of all prior release changes that are included in this update.

**Changes in 3.0 SU 10**

**SCR**          **Description/Details**

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### Component: Credit Bureau Reporting

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**LIQ-5357**    **The cbr_accounts pending row will now be correctly updated with the last reported date for the account if there is one. The change is on hte insert only. This will allow exceptions that have been removed to be applied back to the pending row with the correct last reported date.**

The last reported date for the cbr_accounts table will now be correctly populated for accounts that have been excluded for exceptions and later corrected.

**LIQ-5326**    **CBR "Report Date "Not Met" exception not showing**
If an account has never been reported, the "Report Date Not Met" and other exceptions were not showing.

**LIQ-5310**    **Next Update shows as will report AFTER account has been deleted from cbr file**
After an account was removed from reporting, the panel continued to show as "Will Report". This was a problem with the panel and did not impact actual reporting.

**LIQ-5309**    **Deceased Co-debtor shows as "Will Report" in CBR Panel**
If a co-debtor is deceased, the debtor will now show as "Will Report Deceased" for a pending record and "Reported Deceased" for a reported record.

**LIQ-5256**    **After Custodian is run, Pending no longer reports a dispute.**
Custodian tasks related to credit reporting can prevent the CBR panel from accurately displaying if there is a dispute in the account pending column. Panel now displays correctly.

**LIQ-5172**    **Adding new custodian procedure cbrForceDeletesByStatus.**
This procedure added to the custodian cbr task steps will determine all accounts that are currently in a report/delete configured status and make the appropriate update to force a DA accountstatus determination.

**LIQ-5154**    **Restructured cbr_audit table for better performance**
Altering indexes for performance

**LIQ-5118**    **performance enhancement for cbrResetCbrPrevent and cbrForceDisputesByStatus Custodian procedures**
Changed the join to the related sql table functions to improve overall performance.

**LIQ-5104**    **Multiple performance enhancements for cbr evaluation functions and procedure.**
Altered exception processing, adding several new functions which improved the overall run time performance.

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

**LIQ-4948**    **The cbrAccountHistory function has been altered to take into account any deletes on the account that have occurred preceding the original or last initiated Dispute. When the account has last been deleted the function will return an account that is not is dispute. This will allow the account to once again be reported as a dispute provided the Agency has vetted the data.**
The cbrResetCbrPrevent procedure will need to be executed prior to the bulk evaluation in Custodian. The first run will clear the cbrPrevent flag for qualifying accounts. The evaluation will then repopulate the cbr_accounts table which would then have the compliance condition set by the second or post execution of the procedure named cbrForceDisputesByStatus.

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#### Component: Database

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**LIQ-5440**    **When attempting to build placement files in AIM an error may occur stating invalid column name of Country.**
Placement files in AIM that previously erred due to the invalid column name of Country has been fixed.

**LIQ-5410**    **Court Case Service Type and Service Date are not able to be mapped in Exchange.**
Court Case Service Type and Service Date can be mapped to in Exchange.

**LIQ-5361**    **Error when processing payments after changing system month**
Added SystemMonth and SystemYear to the PK for the DeskStats table

**LIQ-5359**    **Optional credit bureau reporting of compliance condition changed from one time reporting**

**to everytime reporting.**

the compliance condition code in the credit bureau report is reported for as long as it is valid.

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| **LIQ-5351** | **Sometimes ListData was not getting updated by DBUpdate application.** |

ListData is now updated properly by DBUpdate application.

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| **LIQ-5116** | **PIF changing to ACT when promise broken** |

Broken promise will no longer cause a change to status for PIF'd accounts.

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| **LIQ-5112** | **Cannot map to IsAuthorizedUser for debtors in Exchange.** |

IsAuthorizedUser can be mapped for debtors in Exchange.

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| **LIQ-5103** | **Duplicate key issue when multiple applications access letter requests** |

Verify the letter request has not already been processed before creating balance history records.

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| **LIQ-5096** | **sometimes get a duplicate key error when printing letters for delinquent accounts.** |

Corrected logic for insertion of balance history records when letterrequest was requested on delinquent account.

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| **LIQ-5061** | **Corrects issue where unknown statused phone numbers were marked as good during Linking process.** |

Linking process will not change a phonenumber from unknown to good unless it is already marked as good on linked account.

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| **LIQ-4694** | **A pre-existing functionality known as Initialization which was developed for Clients to utilize during implementation is now available via a system level configuration.** |

If configured the cbr evaluation procedures will allow regeneration of previous paid in full and delete report codes. By default this provides the capability to delete a previously reported paid in full account as a delete. This is a temporary allowance to provide medical clients the choice to delete accounts that have been determined to be paid by Insurer and therefore a non outstanding debt. Closed and returned configured accounts will also include previously reported paid in full accounts.

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### Component: Infrastructure

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| **LIQ-5295** | **When using Exchange to import a payment if the account is linked and the spread policy is configured to use Customer Priority the payment will not spread and only the 'source' account that was located by Exchange will receive the entire payment.** |

If using the Customer Priority spread option the payment will spread too all accounts within the link.

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| **LIQ-5294** | **If importing a payment using the Latitude.Core.Payments.DirectBridge to be spread among linked accounts if one of the accounts has a negative balance the attempt will error and no payments will be created.** |

Latitude.Core.Payments.DirectBridge can now handle a payment spread among accounts with one more or more of the accounts having a negative balance.

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| **LIQ-5230** | **Performance improvements to the workform toolbar applications.** |

Made sure modals created by the toolbar were disposed properly to eliminate memory leaks in the workform application.

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| **LIQ-5060** | **Errors can occur when using Exchange and spreading payments without batching or using the Batch Processor. These usually are related to customer fee demand settings.** |

The errors can occur when using Exchange and spreading payments without batching or using the Batch Processor have been resolved.

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

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

percentage as a percentage of the current balance for the collection cost current value.

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### Component: Liquid Center

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**LIQ-5460**    **Customer Task Panel Asset tab not working. Corrected by populating fields correctly.**

Customer Task Panel Asset tab not working. Corrected by populating fields correctly. Account and party ids were not being properly initialized.

**LIQ-5457**    **Fixed missing interactions**

Fixed missing interaction in the 'Interaction panel' for each event.

**LIQ-5455**    **Customer task panel - correcting bug where fields were not populating properly.**

Customer task panel - correcting bug where fields were not populating properly. Select options boxes were not populating correctly due http batching creating a small race condition.

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

Moving insert logic to a trigger on the db.

**LIQ-5436**    **Fixing Prefix and Suffix going blank issue on the customer task panel.**

The prefix and suffix object weren't being returned properly, corrected the issue.

**LIQ-5428**    **NITD letters were being cancelled when the driver account was PIF'd.**

For all NITD letters, if there are any open accounts on the arrangment, then the NITD letter will be printed.

**LIQ-5427**    **Debtor Name updating.**

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

**LIQ-5417**    **Fixing the collector queue next functionality. Client side issue with Angular.**

Client side Angular issue, missing function that needed to be called in collectorqueue.js and queue.js file.

**LIQ-5413**    **Using administration utility and editing User Policy for Applications/AccountData/Scheduled Payments the check boxes were never checked, regardless of the actual settings, and they could not be changed.**

The values for the checkboxes will now save.

**LIQ-5412**    **When arrangement is placed on Hold or released from Hold, it doesn't returns any errors.**

When an arrangement is placed on Hold or released from Hold, it doesn't returns any errors.
The 'Holds' check boxes are disabled when an arrangement is Proposed and opened in Edit mode and enabled only after an arrangement has been saved.

**LIQ-5408**    **It immediately updates qlevel with a new value in the 'Account Status' anchor after a 'Follow-up Date'.**

It immediately updates qlevel with a new value in the 'Account Status' anchor after a 'Follow-up Dat ' was set up for an account.

**LIQ-5407**    **Custom Queue is closing and moving to next after Follow up was set**

Custom Queue is closing and moving to next after Follow up was set

**LIQ-5402**    **Qlevel should not cause any issues when it's not a non-numeric type**

Qlevel should not cause any issues when it's not a non-numeric type on pop a linked/single account, display data in account navigator anchor for linked accounts and when set an arrangement fro a linked/single account.

**LIQ-5401**    **Fixing issues on Payment Task Panel, both client side and server.**

Payment Task Panel - Fixed issue with client side code, where the paymentId was not being returned. Also corrected a server side issue where it was requiring an arrangementId on a payment taken on the payment

task panel. Both issues were causing exceptions and are now corrected.

**LIQ-5399**

**UX improvement needed when the user saves a judgment with a zero total amount.**

Informational message added to the UI to alert the user when no amounts have been added to the judgment award.

**LIQ-5398**

**Processing PIF or SIF in workform is changing status or qlevel**

Processing PIF or SIF in workform is changing status or qlevel in the arrangements and anchor cards(AccountNavigator, AccountStatus)

**LIQ-5383**

**An error occurs when the account summary data is fetched from the server in the CB Reporting panel**

A server change was made to prevent an exception from being thrown when the summary data is fetched upon loading the CB Reporting panel.

**LIQ-5382**

**Deleted 'deceased' codebtor Next update shows as Will Report Delete**

After a codedebtor has been deleted from reporting, the panel continued to display that the delete will be reported in subsequent reports.

**LIQ-5378**

**Fixed checks for boolean API returns being strings when API batch is off, and true booleans when on**

several ternary expressions were added to evaluate whether a string "true" or TRUE variable is present when receiving a boolean message from the server.

**LIQ-5376**

**Unable to save notes on accounts where cbrException32 is populated with a value less than the min value for a smallint.**

Aliases were corrected in the database, users can now save notes on all accounts.

**LIQ-5368**

**Breaking change was made to api endpoint to get bucket names for the judgment UI**

The broken route was updated and the bucket names now load correctly in the judgment tab of the legal panel.

**LIQ-5364**

**Refactored several misspellings of received throughout the codebase**

several back-end pieces of functionality had received spelled "recieved". Have fixed them throughout the codebase

**LIQ-5348**

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

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

**LIQ-5345**

**Mapping the arrangementId to arrangementScheduled/rescheduled events now**

we were previously not mapping the arrangement Id to the root arrangement event on the scheduled/resceduled paths.

**LIQ-5342**

**Filter out closed accounts in the Link Summary Anchor Card**

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

**LIQ-5315**

**Fixed the ISPIF field on statuses not displaying**

There was a casing issue on the variable for displaying the isPIF field, which was allowing it to be sent to the server correctly but it wasn't coming back when the panel was reloaded.

**LIQ-5293**

**If a reminder was dismissed on account that was PIF'd, the QLevel for that account would be set to 599 when it should remain closed.**

When dismissing a reminder, the qlevel will not be changed if it is 998 or 999.

**LIQ-5285**

**Data not loading in select linked account dialog**

The way data is loaded for the select linked account dialog has been changed, which will result in faster data

loading times.

**LIQ-5284**  **Data not loading in select linked account dialog**
The way data is loaded for the select linked account dialog has been changed, which will result in faster data loading times.

**LIQ-5283**  **Added updates to master when events for AccountWorked and AccountContacted events**
When notes have result/action codes that should be updating the worked and contacted fields of master are used they should now be properly updating the table The UpdateAccountStatistics handler didn't have update statements for master.

**LIQ-5282**  **Performance improvement regression when opening the modal to select linked accounts for an account status change.**
A fix was implemented for updating account statuses across linked accounts. The modal now opens without issue and the user can select the accounts to update.

**LIQ-5277**  **Performance improvement regression when sending linked letters**
A fix was implemented to correct an error that was occurring when attempting to send a letter to multiple linked accounts.

**LIQ-5239**  **QLevel being set incorrectly**
Prevent the Clerical and Supervisor queue from changing the qlevel to an erroneous number when the "Next" button is clicked.

**LIQ-5224**  **Clean ups on client and server.**
Clean ups on client and server by using client side api services

**LIQ-5220**  **Retrieved the most important data first.**
Retrieved the most important data first in order to fill anchors identified as Priority 1.

**LIQ-5209**  **Performance enhancements to status modal.**
Fixed issue with status modals not destroying watches that was creating performance issues on the workform.

**LIQ-5206**  **Duplicate payments appearing in Agent Info modal.**
A condition was added to filter out duplicate data in the Agent/Collector Info modal.

**LIQ-5204**

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

**LIQ-5182**  **Incorrect master.qlevel behavior when accounts are put into support queues.**
When an account is moved into a support queue, master.qlevel is no longer updated.

**LIQ-5180**  **CB Panel debtor status message**
When ECOA is "Z", the message displayed should be "Will Report Delete" instead of "Will Report"

**LIQ-5179**  **Fixed a type check in the directive that creates event templates**
There was a type check that was checked in erroneously in latObj.js

**LIQ-5158**  **Added medical Account details/ Navigator anchor card**
Card that is identical to the linking anchor/liked account anchor/account link details/account navigator except has the Recieved Date and clidlc fields from master, in addition to the ability to sort the columns.

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

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

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

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

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

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

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

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

**LIQ-5131**    **Clearing filters in the Agent Info modal causes the user to switch incorrectly.**

If the clear button in the agent info modal is used to reset the filters an error occurred.

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

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

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

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

**LIQ-5117**    **Consolidated database calls on the currentBalance/get endpoint**

The current balance endpoint was making a new database query for every account in the link. This has been fixed.

**LIQ-5109**    **Judgment fields not appended to end of printed letter file.**

Rearranged fields to include them at the end of the file.

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

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

**LIQ-5098**    **Compliance Condition Not Appearing in Panel**

If a code exists for account's the compliance condition, the description will appear in the account pending and reported notes of the panel.

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

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

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

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

**LIQ-5086**    **Reversing judgement doesn't reallocate bucket amounts correctly**

When reversing a judgement the resulting balances for each bucket will be correctly accounted for.

**LIQ-5084**   **Fixed payment spread not displaying balance**

Fields were changed on the currentAccount service, and the bucket names for chargedoff/delinquent were different than what they were previously. Now just displaying current0

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

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

**LIQ-5066**   **fixed an issue with the promise returning the configuration status of permiions**

Was caused by the way the promise was being returned by the policy service.

**LIQ-5054**   **Scheduled payments showing under incorrect account in arrangements panel.**

Changed what field was being used to order these payments which allowed these payments to appear on the right account

**LIQ-5052**   **Account Navigator Anchor now displays accounts in the "correct" order**

When loading an account, accounts displayed in the account navigator anchor now displays accounts in the same order as the arrangements account selector (qLevel, receivedDate), with closed accounts at the bottom.

**LIQ-5048**   **Fixed an issue where the balance wasn't appearing properly in the Override Payment Spread modal table.**

There was a logic error with the field that contains the balance when accounts are charged off, and there is now a proper check for if that account is charged off and it uses the correct field to display the account balance.

**LIQ-5041**   **Permissions can now be set at the class of business level without having to set the system level permission as denied.**

It appears there was a check that was missed in the sproc that resolves permissions for multiple customers that wasn't checking the class of business code field on the appliedPermission record.

**LIQ-5021**   **User should not be able to set a reminder if an account is closed.**

For Multi-Users working the same account if 'Save' button is enabled
It should display an error message if payment is processed before reminder has been set, otherwise User should not be able to set a reminder if an account is closed.

**LIQ-5014**   **Transaction type in the CBR panel now displays the code and description.**

A change was made for the transaction type in the cbr panel account information tab to display in the format of "code - description" with a tooltip in the event the description is too long to show in the provided space.

A new custom list was added (CBRTRNSTYP) to provide descriptions for the codes.

**LIQ-4992**   **Changes to the LJ/LJR logic required to have interest accrue correctly.**

Changes were made to the award/reverse judgment process in order for interest to accrue properly on accounts.

**LIQ-4979**   **Code added to convert special characters for proper display in the events panel.**

Code was added to convert < and > characters in the events panel so they display properly.

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

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

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

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

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

Changed to Responsible Balance and Collectible Balance respectively.

**LIQ-4886**   **Adding paging to the Account Navigator Anchor Card.**
The Account Navigator Anchor Card will now use paging if the number of linked accounts is greater than 4.

**LIQ-4857**   **Columns were not showing up for any of the buckets upon reviewing the letter in Letter History**
Properly assigned locations for both control file bucket labels and delinquent aging bucket labels

**LIQ-4851**   **Performance enhancement to saving new or updating existing arrangements**
Approximately a 30-40% decrease in time when saving new or updating existing arrangements

**LIQ-4725**   **if a Payment Custom Spread Override is in place, payments will spread in the order specified, rather in the globally configured**
new facility for user to override account payment spread priority

**LIQ-4669**   **Added additional validation and an option for whether to copy data from a erson to a new person when unlinking an account**
Added validation for checking the link console settings on manual linking. Also added a checkbox on removing a link that allows the user to tell the server whether or not it wants to copy data over to the new person in the link.

**LIQ-4647**   **Functionality to be added that allows users to complete the judgment award process on an account.**
Various features have been added to allow the user to complete the awarding and reversing of judgments on a series of linked accounts. This includes a new judgment spread calculator that allows the user to enter in amounts for each judgment category across all accounts involved in the judgment.

**LIQ-4577**   **Issue with DBUpdate duplicating anchor cards**
DBUpdate was duplicating anchor cards so that you would see each one twice on the workform after running DBUpdate. This has been resolved.

**LIQ-4569**   **Reporting console does not properly display address.**
A NULL value is no longer put in Street2 when a new Client record is created and the address properly displays in the Reporting console.

**LIQ-4540**   **Collector fee schedule dollar ranges not calculating properly**
The upper and lower bounds for fee schedule items have been refactored to calculate correctly. Minor UI/UX improvements have also been made.

**LIQ-4538**   **A system permission exists in Administration to toggle the cache on/off.**
Allows server caching of Permissions

**LIQ-4479**   **Permissions added for Manual Linking, Interest, and Holds.**
3 new permissions were added in administration under applications/liquid latitude/account actions. These permissions control whether or not a user is able to manually link accounts, start/stop interest, and add account/customer holds.

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

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

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

**User can no longer select closed accounts for an arrangement**

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

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

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

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

User can no longer select closed accounts for an arrangement

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

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

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

**LIQ-4192**  **Deprecated Allowed Letters permission.**

**LIQ-4135**  **Fix event handler when new phones are added.**

A fix was made to the phones panel that was causing phone numbers to not properly update when a new phone was added.

**LIQ-4074**  **Fields to be removed from the status configuration under system codes and settings in administration.**

A number of superfluous fields have been removed from the status configuration under System Codes and Settings in administration. UI improvements have also been made to closer match the UI from previous versions of this product.

**LIQ-4027**  **New feature to view pending and processed payments being credited.**

The Collector/Agent Information modal displays postdated and processed payments filtered by user, user desk, and date.

**LIQ-4021**  **Anchor cell configuration in administration does not behave correctly**

The logic for the anchor cell cell configuration in administration has been refactored to sort, add and delete correctly.

**LIQ-3989**  **Fixed the party navigator anchor not displaying the holds were created when they are created.**

Added event handlers for Complaints events when holds may be generated as a result of a complaint being modified/created/closed to refresh the hold banner on the anchor card.

**LIQ-3904**  **Bankruptcy warning not displaying if date filed not entered.**

The requirement of Date Filed for bankruptcy warnings to appear has been removed.

## Changes in 3.0 SU 9

| SCR | Description/Details |
|---|---|

**Component: Administration Tool**

**LIQ-4997**  **Clerk middle name not appearing in the UI**

A fix was made to the html markup that was causing the clerks middle name not to appear in the court tab of the legal panel.

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### Component: Credit Bureau Reporting

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**LIQ-5015**  **New function which provides an unpivoted view of the cbr Exceptions.**
**Similar to the cbrDataExceptionDtl() function.**

The function cbrDataExceptionDtlex() will provide a result set containing the Accountid, Debtorid and error message for all respective exceptions.

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

No change to functionality.

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

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

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

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

**LIQ-4955**  **A previously reported Co-Debtor that is later reported as removed will now be eliminated from the pending table.**

The evaluation procedure will remove from cbr_debtors any debtor that has been removed and reported as removed from the account. The next evaluation run after the report will delete the respective row. This will be reflected in the cbr metro2 panel report status.

**LIQ-4953**  **CBR History is missing details in CB Panel history**

Due to database changes, the dropdown that allows user to pick previous reported dates was not bringing up the detail information of the selected report.

**LIQ-4952**  **Exclusion statuses for co-debtors were not reporting correctly.**

Once reported, the final statuses continued to report. This correction prevents further reporting.

**LIQ-4951**  **Correction to the OLTP cbrEvaluateAccount procedure to add a isnull test which was preventing proper status calculation.**

A DA status was being defaulted in certain situations in this procedure due to a missing isnull test.

**LIQ-4950**  **New function added for cbr panel pending and reporting statuses.**

cbrAccountsWithComplianceCondition added

**LIQ-4949**  **Display "Deceased" or "Bankruptcy" when appropriate in "Reported" section of CBR Panel.**

Queries reworked to use bankruptcy and deceased tables.

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

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

**In previous versions the cbr exceptions for a given account or debtor was restricted to the**

**LIQ-4946**      **first error encountered. This update provides for all exceptions to be reported for given account or debtor.**

The cbrReportexceptions and cbrReportExceptionsDtl views will provide aggregated and detail result sets for the respective exceptions.

The cbrDataExceptionDtl() function may be called with a specific account or null for all accounts to provide details for all exceptions.

**LIQ-4944**      **Minimum Balance Exclusion test is now on the current principle amount.**

If you do not have 'principle only' configured then the balance reported to the Bureaus would consist of Principle owed + interest owed.

Minimum balance exclusion only tests the current principle and if the account has not previously reported will exclude the account. Otherwise a previously reported account continues to report.

**LIQ-4943**      **ECOA code values of 'T','Z' and 'X' will be prevented from repeatedly reporting after the initial report.**

The cbrPostHistory process which is called after the cbr report file has been written to disc will set the cbrExclude flag for the respective debtors when writing to the cbr_metro2 history tables.

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## Component: Database

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

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

**LIQ-4970**      **Events panel is not properly showing notes events due to improper formatting.**

Changing the markup to properly display < and > allowed the events panel to properly display the events.

**LIQ-4699**      **Certain cbr evaluated exception accounts are reporting when they should not.**

MinBalException, RptDataException and all others not contained in cbrexceptions or debtor exceptions will now be removed from pending correctly.

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## Component: Infrastructure

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

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

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## Component: Liquid Center

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**LIQ-5048**      **Fixed an issue where the balance wasn't appearing properly in the Override Payment Spread modal table.**

There was a logic error with the field that contains the balance when accounts are charged off, and there is now a proper check for if that account is charged off and it uses the correct field to display the account balance.

**LIQ-5033**      **Removing codebtor in CBR not functioning properly.**

When a codebtor was removed from an account and the account was evaluated, ecoacode was getting reset and the debtor was not removed. A change was made to set the CBR Exclude flag to 1 to resolve the issue.

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

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

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

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

**LIQ-4996**      **Summary judgment deadline not saving due to typographical error.**

A typo was corrected in the general tab in the legal panel that allows Summary Judgment Deadline to be correctly saved and displayed.

**LIQ-4992**      **Changes to the LJ/LJR logic required to have interest accrue correctly.**

Changes were made to the award/reverse judgment process in order for interest to accrue properly on accounts.

**LIQ-4986**      **users can no longer manually link or unlink accounts that are in court cases.**

A check has been added to the manual linking command that prevents users from linking and unblinking accounts that have a courtcase record.

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

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

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

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

**LIQ-4982**      **The creation of a Direct Debit Wallet item results in the Username populating the CreatedBy field which can overflow the 20 character limit.**

The LoginName now populates the Wallet's CreatedBy field and will prevent overflow errors.

**LIQ-4978**      **PayType and PayMethod needs to be populated when creating LJ and LJR transactions in PayHistory**

A change was made to populate the PayMethod and PayType fields with Legal Judgment and Judgment Reversed (respectively) in PayHistory when LJ and LJR transactions are created.

**LIQ-4976**      **Deleted letters not displaying in Letter History Panel**

A correction was made to the letter history panel to show deleted letters.

**LIQ-4971**      **Linked Letter Details - Amount Due value displaying incorrect amount.**

Linked Letters now display the correct value in the amount due field based on the charged off state of the accounts involved.

**LIQ-4965**      **regression issue for "reschedule" fixed**

regression issue for "reschedule"

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

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

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

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

**LIQ-4960**      **Court Notes/Comments field would only accept 50 chars**

The Court Notes/Comments field now accepts up to 1000 chars.

**LIQ-4957**    **Redundant requests made to server in Clerical queue**
Remove redundant server request made in client

**LIQ-4956**    **Removing Account Update Call when popping accounts.**
Removing the Account Update Call when popping accounts to increase performance.

**LIQ-4936**    **A regression occurred when work was being done on the permissions for a different feature that causes users not to be able to award judgments due to the permission appearing to not be configured.**
The regression in the Award/Reverse Judgment permission has been corrected and awarding judgment now functions as intended.

**LIQ-4917**    **Judgment tab of the Legal Panel requires more intuitive form validation.**
Changes were made to the UI to more clearly inform the user when there is invalid data in the panel fields. The save button is also disabled if there is any bad user input.

**LIQ-4916**    **UX improvements needed for when users verify employment information in the Customer Task Panel.**
Event handlers were added to the clientside code in order to improve user experience when verifying employer information in the CustomerTask Panel. The Verified When and Verified By fields will now show/hide correctly based on the users actions.

**LIQ-4915**    **The date/day dropdown was not visible for selection. In addition, an arrangement could not be saved due to the Frequency field not saving.**
Updated the conditions to reflect the changes previously made to the frequency field.

**LIQ-4913**    **performance fixes for email panel**
removed extra variable that was unused int he edit modal

**LIQ-4888**    **Unnecessary code exists in the sole responsibility functionality.**
A line of code was removed from the sole responsibility functionality that will slightly improve performance.

**LIQ-4884**    **charged off account check not causing the display of an error message and not disabling UI fields**
A small fix was implemented that causes the charged off account check to properly display an error message and disable the UI fields when there are non charged-off accounts in the link.

**LIQ-4876**    **Judgment Panel - Moving accrue interest check boxes.**
Judgment Panel - Aligned check boxes to second row of labels.

**LIQ-4856**    **Judgment Interest rate stored in wrong format in AccountInterestSettings table.**
Judgment logic was changed so that the interest rate percentage is displayed as follows: ten percent displays as 10 in the UI and .10 in the database.

**LIQ-4817**    **Users allowed to pop accounts outside of branch when configuration prohibits it.**
A fix was made to re-add some incorrectly removed code that existed previously. This causes the account pop functionality to respect configuration as it did in su05.

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

**LIQ-4809**    **Peek Endpoint Performance changes - Efforts to increase workform performance.**
Peek Endpoint Performance changes - Refactored the anchor, task and reference queries to avoid multiple unnecessary calls to the database to increase performance on the workform.

**LIQ-4808**    **Performance improvements needed when popping many linked accounts.**
Changes were made that reduce the number of database queries made when popping accounts with many links.

**LIQ-4802** **Improve pop performance**
Removed dependency on ILinkingManager and directly queried to improve pop performance

**LIQ-4794** **Removing Account Update Call when popping accounts.**
Removing the Account Update Call when popping accounts to increase performance.

**LIQ-4785** **Liquid Administration panel errors when attempting to save a permission with unpopulated lists, such as the Accepted Payment Types in Scheduled Payments > Created Scheduled Payments permission.**
Modified Liquid to check that the records are populated before it attempts to create a new one without sufficient data.

**LIQ-4777** **Various sub features added to the judgment tab of the legal panel.**
Additional functionality has been added to the judgment tab of the legal panel to improve user experience. Including but not limited to: additional error messages, disabling of buttons, confirmation message boxes, and a change to how the accrued interest checkbox selections are stored in the database.

**LIQ-4748** **UI Changes needed to accommodate smaller resolution environments using the select linked accounts dialog.**
UI changes were made to allow for the entire select linked accounts modal to be visible when using a resolution of 1280x1024.

**LIQ-4726** **Desired name formatting not persisted to database and is only interpolated on workform.**
Updated any writes to the debtor table so it adheres to configured name template.

**LIQ-4725** **if a Payment Custom Spread Override is in place, payments will spread in the order specified, rather in the globally configured**
new facility for user to override account payment spread priority

**LIQ-4724** **Maximum Days to Payment threshold not enforced in Arrangements panel.**
Enforced via change in logic order existing in proposal of an Arrangement.

**LIQ-4656** **The accrued interest field in the legal panel judgment tab displays the wrong value.**
Display the accrued2 value and corrected display rounding.

**LIQ-4655** **The previous balance fields of the judgment tab in the legal panel display incorrect values.**
Previous Balance fields should now display the correct values.

**LIQ-4599** **Judgment Date and Date Judgment Recorded fields need to have max date set.**
Max date attributes have been added to the Judgment Date and Date Judgment Recorded datepickers in the judgment panel. Users may not select a date later than the current day.

**LIQ-4441** **Nightly, Custodian will review arrangements and closed accounts and in the event that all accounts in the arrangement are closed, the arrangement will be cancelled (all future payments marked as Cancelled) and a summary note will be written similar to - ""Arrangement Cancelled - # of payments totaling ####.##"" (currently this part is in Custodian but it writes a note for each payment being cancelled which is undesirable and is probably not performing the logic correctly for linked accounts)**

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

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

**User can no longer select closed accounts for an arrangement**

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

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

[dbo].[spSetArrangementInactiveForClosedAccounts] is the name of the new sproc, it doesn't take any parameters.
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User can no longer unlink an account from other accounts if it is involved in a linked account arrangement

| LIQ-4388 | **Added JoinedDebtorID logic to reduce data duplication across the JoinedDebtorID link** |
|---|---|
| | Joined debtors are now associated with each other for the purpose of realizing the concept of a person, who has a single set of data unique to that person. For the time being that information is Address, Email, Complaints, Income and Expenditure, Care and Financial Hardship. |

| LIQ-4266 | **large arrangement saves and updates are sent to the DB server as fewer and larger SQL statements (versus many more yet smaller SQL statements)** |
|---|---|
| | more efficient SQL for arrangement saves and updates |

### Component: Liquid Portal

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

### Changes in 3.0 SU 8

| SCR | Description/Details |
|---|---|

### Component: Database

| LIQ-4753 | **Fixed erroneous "Will Report" message** |
|---|---|
| | If a credit report has not been scheduled to report, the credit reporting panel displayed "Will Report". Under this circumstance, it now displays "Not Scheduled". |

| LIQ-4469 | **Stairstep report takes long time to run** |
|---|---|
| | The performance of the stairstep report is now acceptable |

### Component: Infrastructure

| LIQ-4771 | **New Collection Cost mode of "Current Gross"** |
|---|---|
| | Supports collection cost mode for taking a certain percentage from each payment up front towards collection cost, and the current collection cost amount is the percentage of the gross balance after collection cost is included. This differs only slightly from "Current Balance" in that "Current Balance" uses the collection cost percentage as a percentage of the current balance for the collection cost current value. |

| LIQ-4769 | **The ability to establish which buckets are used when calculating interest was not always used when calculating interest. It was using the sum of all buckets except for the interest bucket when determining the bearing balance.** |
|---|---|
| | The ability to establish which buckets to use for determining the bearing balance when calculating interest is respected. |

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### Component: Liquid Center

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**LIQ-4916**

**UX improvements needed for when users verify employment information in the Customer Task Panel.**

Event handlers were added to the clientside code in order to improve user experience when verifying employer information in the CustomerTask Panel. The Verified When and Verified By fields will now show/hide correctly based on the users actions.

**LIQ-4915**

**The date/day dropdown was not visible for selection. In addition, an arrangement could not be saved due to the Frequency field not saving.**

Updated the conditions to reflect the changes previously made to the frequency field.

**LIQ-4884**

**charged off account check not causing the display of an error message and not disabling UI fields**

A small fix was implemented that causes the charged off account check to properly display an error message and disable the UI fields when there are non charged-off accounts in the link.

**LIQ-4876**

**Judgment Panel - Moving accrue interest check boxes.**

Judgment Panel - Aligned check boxes to second row of labels.

**LIQ-4856**

**Judgment Interest rate stored in wrong format in AccountInterestSettings table.**

Judgment logic was changed so that the interest rate percentage is displayed as follows: ten percent displays as 10 in the UI and .10 in the database.

**LIQ-4817**

**Users allowed to pop accounts outside of branch when configuration prohibits it.**

A fix was made to re-add some incorrectly removed code that existed previously. This causes the account pop functionality to respect configuration as it did in su05.

**LIQ-4797**

**PaymentProcessed event template has syntax error.**

Code change was implemented to stop a console error from occurring due to bad syntax in one of the event templates.

**LIQ-4785**

**Liquid Administration panel errors when attempting to save a permission with unpopulated lists, such as the Accepted Payment Types in Scheduled Payments > Created Scheduled Payments permission.**

Modified Liquid to check that the records are populated before it attempts to create a new one without sufficient data.

**LIQ-4777**

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

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

**LIQ-4754**

**An overpayment was not setting master.paid correctly. This results in problems with overpayments and reversals of those transactions. This was deducting the overpaid amount from the total paid on payhistory when setting master.paid.**

Overpayments and Overpayment Reversals will not correctly update the master.paid value. The master.bucket is now updated with the totalpaid from the transaction.

**LIQ-4748**

**UI Changes needed to accommodate smaller resolution environments using the select linked accounts dialog.**

UI changes were made to allow for the entire select linked accounts modal to be visible when using a resolution of 1280x1024.

**LIQ-4736**

**Getting notes fails when using System or User filtering.**

The Generated SQL statement was originally coming out with nested union clauses which would become too deeply nested when there were a large number of users configured in the system. Changed the code so an IN clause is generated which eliminated the nesting and allowing filtering to complete

**LIQ-4719**      **Arrangements policy does not allow for prohibiting settling an account on the client level.**

Added a part to the Create Scheduled Payments policy that allows/disallows settling of accounts on the client level

**LIQ-4718**      **Drive Entity Name in Direct Debit Guarantee from new Customer Permission**

There is now a permission to change the Direct Debit Guarantee verbiage. It is in Applications\Liquid Latitude\Account Data\Scheduled Payments

**LIQ-4656**      **The accrued interest field in the legal panel judgment tab displays the wrong value.**

Display the accrued2 value and corrected display rounding.

**LIQ-4646**      **Judgment functionality expanded to allow users to manage the entire judgment process from the liquid workform.**

Functionality was added to the workform legal panel that allows the user to manage the entire legal judgment process and award/reverse judgments on linked accounts.

**LIQ-4632**      **Account Navigator Anchor Card displays the Responsible Party Balance**

Account Navigator Anchor Card displays the Responsible Party Balance for Joined Debtors

**LIQ-4620**      **Allow configuration of the payment frequency options in the Arrangements panel.**

Added a part to the Create Scheduled Payments policy to allow configuration of the payment frequencies available via dropdown in the Arrangements panel.

**LIQ-4477**      **DAR/DA records are no longer included in credit balance calculation**

Previously there wasn't an entry in the endpoint in the loop that calculated credit balance, which included PU, PA, and PC batchtype payments. There is now a default, and any type not included above correctly sets a variable to 0 before it is summed into the other variable that is used to populate the dto that is sent to the client for display.

**LIQ-4462**      **Duplicate policy entries under General Settings**

Removed duplicate policy entries under General Settings.

**LIQ-4418**      **ExtraData field lengths upped to 128 (from 30)**

ExtraData field lengths upped to 128 (from 30)

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

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

**LIQ-4379**      **Unable to save a Judgement record unless Judge field is set to empty string**

Added code to force a empty string if the field is not been filled out (null).

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### Component: Liquid Portal

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

new payment spread mechanism: fee schedule bucket priority

### Changes in 3.0 SU 7

| SCR | Description/Details |
|-----|---------------------|

### Component: Database

**LIQ-4694**   **A pre-existing functionality known as Initialization which was developed for Clients to utilize during implementation is now available via a system level configuration.**

If configured the cbr evaluation procedures will allow regeneration of previous paid in full and delete report codes. By default this provides the capability to delete a previously reported paid in full account as a delete. This is a temporary allowance to provide medical clients the choice to delete accounts that have been determined to be paid by Insurer and therefore a non outstanding debt. Closed and returned configured accounts will also include previously reported paid in full accounts.

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

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

**LIQ-4635**   **Added NY letter fields to letter vendor file**

The following fields were added to the vendor letter file in order to be compliant with New York State regulations: Field names in output file will have the following headers: NYComplianceChargedOffAmount, NYComplianceInterestPrior, NYComplianceInterestTotal, NYComplianceFeesPrior, NYComplianceFeesTotal, NYCompliancePaymentsPrior, NYCompliancePaymentsTotal

**LIQ-4469**   **Stairstep report takes long time to run**

The performance of the stairstep report is now acceptable

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### Component: Liquid Center

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**LIQ-4785**   **Liquid Administration panel errors when attempting to save a permission with unpopulated lists, such as the Accepted Payment Types in Scheduled Payments > Created Scheduled Payments permission.**

Modified Liquid to check that the records are populated before it attempts to create a new one without sufficient data.

**LIQ-4736**   **Getting notes fails when using System or User filtering.**

The Generated SQL statement was originally coming out with nested union clauses which would become too deeply nested when there were a large number of users configured in the system. Changed the code so an IN clause is generated which eliminated the nesting and allowing filtering to complete

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

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

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

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

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

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

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

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

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

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

**LIQ-4595**      **Removed validation around NationalId / SSN field, so other contact information changes wouldn't be rejected.**

The application was previously validating that the NationalId was not all the same number. If a conversion or exchange client brought in contacts with these NationalIds and agents were configured to not be able to edit NationalIds, then the agent could not work around this validation and save other changes to the contact information.

**LIQ-4586**      **Corrected a problem where sp.Linking_DetermineLinkActions was failing with a NULL exception message due to LinkID being removed from the stored procedure.**

Corrected a problem where sp.Linking_DetermineLinkActions was failing with a NULL exception message due to LinkID being removed from the stored procedure.

**LIQ-4581**      **Events Will Not Show For Accounts With At Least One Note Containing an Ampersand Character**

An Ampersand character (&) will cause an error when the Events panel is displayed on any account having at least one note with that character. This bug has now been fixed.

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

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

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### Component: Liquid Portal

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

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

2) INSERT a row in to a table to define the panel. The only values that need to remain the same are the 'Type' and 'Url' column. Sample:
INSERT INTO [lat].[UserInterfacePlugins]
( [Type] ,
[PluginName] ,
[DisplayName] ,
[Url] ,
[Parameters]
)
VALUES ( 'PANEL' , -- Type - varchar(25)
'GenericDataPanel' , -- PluginName - varchar(50)
N'Generic Data Grid Panel' , -- DisplayName - nvarchar(100)
N'workform/views/panel/genericPanel.tmpl.html' , -- Url - nvarchar(250)
'dbo.TestSproc' -- Parameters - varchar(255)
)

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

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### Changes in 3.0 SU 6

| SCR | Description/Details |
|---|---|

### Component: Database

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**LIQ-4580**      **Added a default to the invalid column, as it is not nullable.**

**LIQ-4484**      **Invoice Summary report duplicating amounts**

Invoice Summary report duplicating amounts if invoices are run twice in the same day. An update to the report and the invoice reporting form is required.

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**LIQ-4469**    **Stairstep report takes long time to run**
The performance of the stairstep report is now acceptable

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

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### Component: Liquid Center

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**LIQ-4619**    **Direct Debit Guarantee Button Added to Wallet**
If you open the Wallet Editor, you will now see a Direct Debit Guarantee button on the Direct Debit tab. Clicking it will give you the Direct Debit Guarantee verbiage.

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

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The application was previously validating that the NationalId was not all the same number. If a conversion or exchange client brought in contacts with these NationalIds and agents were configured to not be able to edit NationalIds, then the agent could not work around this validation and save other changes to the contact information.

**LIQ-4581**    **Events Will Not Show For Accounts With At Least One Note Containing an Ampersand Character**
An Ampersand character (&) will cause an error when the Events panel is displayed on any account having at least one note with that character. This bug has now been fixed.

**LIQ-4568**    **Linked Letter Details - Amount Due value displaying incorrect amount.**
Linked Letters now display the correct value in the amount due field based on the charged off state of the accounts involved.

**LIQ-4567**    **Multiple letter records displaying in the pending letter panel when a linked letter is sent.**
A fix was implemented to only one one record for each linked letter that is sent. Previously a record was displaying for each account involved in the linked letter.

**LIQ-4523**    **Enhancements to the linked account selection modal**
An advanced selection options section has been added to the linked account selection modal for linked account status updates and linked letters.

**LIQ-4519**    **Adding "employment verification" to the customer task panel.**
Three fields have been added to support this: JobVerified (boolean), JobVerifiedWhen, JobVerifiedBy. modifying the record un-verifies the record and it must be verified again.

**LIQ-4434**    **Developed a solution to prevent letters being sent on debtors with bad addresses..**
Added a Message Box to pop when an attempt is made to send a letter for a debtor with a bad address.

**LIQ-4418**    **ExtraData field lengths upped to 128 (from 30)**
ExtraData field lengths upped to 128 (from 30)

**LIQ-4398**    **a client may be configured with a maximum surcharge, use 0 to disable entirely, or blank for unrestricted**
surcharges can be restricted / capped by client

**LIQ-4387**    **Notes panel now has a filter to separate system notes and user notes**
There is a new filter on the notes panel that allows a user to choose whether they see notes created by users,

the system, or all of the above.

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

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

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

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

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### Component: Liquid Portal

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**LIQ-4578**    **A javascript feature (Promises) supported by FF and Chrome was assumed to be present in IE11. This fix implements a workaround for IE11.**

dialer integration does not work using IE11

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

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

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

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

**LIQ-4096**    **Fixed the height of the phones reference panel to allow the edit dropdown to be visible.**

Added a height attribute to the phones panel.

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

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

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### Changes in 3.0 SU 5

**SCR**        **Description/Details**

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### Component: Database

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**LIQ-4484**    **Invoice Summary report duplicating amounts**

Invoice Summary report duplicating amounts if invoices are run twice in the same day. An update to the report and the invoice reporting form is required.

**LIQ-4455**    **After running dbupdate the enabled flags will be set to true on all listdata that is contained in the dbupdate.**

removed the synchronize attributes so that the Enable value is not sychronized when dbupdate is ran.

**LIQ-4453**    **Because of new fields in the dbo.Insurance table Exchange cannot load insurance.**

Exchange will load insurance records with new fields.

**LIQ-4432**    **Enhancements to Letter Console require ability for stored procedure to optionally accept accountId.**

Modify stored procedure to allow accountId property

**LIQ-4431**    **The dbupdate script CreatePaymentSubBatchTypes.sql needs to be refactored to improve performance. Currently it can take hours to run if the payhistory table contains 80 million records.**

The dbupdate script CreatePaymentSubBatchTypes.sql needs to be refactored to improve performance. Currently it can take hours to run if the payhistory table contains 80 million records. An index create and drop were added to the script to allow efficient query optimization. Also the syntax of the query was refactored to take out redundant clauses.

**LIQ-4422**　　**Change in open balance for an account will be reported regardless of valid last payment date.**

Active accounts that have previously reported will now be reported as an update when the calculated (pending cbr_accounts open balance) amount is different from the last reported balance amount regardless of any other recorded change.

**LIQ-4353**　　**Forced deletes not making it through to the final result due to order of precedence in respective coalesce statement.**

Altered order precedence for the status determination to correct. DA will now be allowed to be forced via the master.specialnote method.

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

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

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

Alter procedure that processes letters.

**LIQ-4261**　　**Subject Debtor fields not populating due to using new Collector/Liquid tables.**

Modify code and SQL procedures to populate Subject Debtor fields.

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

NITDSendDate needed to process Letter requests through Custodian.

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

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

**LIQ-3625**　　**Modified script to use ScheduledPayment table (and support views). Replaces use of old Classic payment tables (pdc, DebtorCreditCards, and Promises).**

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### Component: Liquid Center

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

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

**LIQ-4448**　　**Insured Work Phone field added to medical panel.**

The Insured Work Phone field was previously missing from the UI, this has now been resolved.

**LIQ-4446**　　**CPS payments now work with modified Arrangement manager**

The arrangement manager's handling of custom payment types to support CSERIES prevented custom payment types of credit card from working (this is the kind of custom payment that CPS uses during the initiation of a CPS payment). This has now been fixed to work with custom payment types that are not type 11.

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

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

| LIQ-4427 | **Multi-payment Arrangements Are Now Working in All TimeZones** |
|---|---|
| | Multi-payment Arrangements were being prevented from being created in GMT Timezone due to the +1 hour offset in England. This caused the internal date of the client browser to be 23 hours, instead of 24 hours, and causes the date validation to fail making it impossible to Save the proposed arrangement. |

| LIQ-4399 | **Class of business dropdown should now correctly display classes of business in the client configuration section of administration** |
|---|---|
| | There was an issue with the way that the class of business dropdown was calling hte server, and was getting paged results for the dropdown, causing several/all of the options to not disppear or map correctly in the administration tool. |

| LIQ-4386 | |
|---|---|

| LIQ-4380 | **Attempts to create reversals do not perform well.** |
|---|---|
| | Attempts to validate reversals when using postdateuid and paymentlinkuid have been adjusted to use stored procedures instead of inline sql queries. This should help with performance issues that can occur on large databases. |

| LIQ-4361 | **Changes made to the payment batch processor details grid.** |
|---|---|
| | Multiple changes were made to the payment batch processor details grid including removing a superfluous id column, changing the token hash value to the last 4 of the payment method, removing the display of the account spread and splitting surcharges out when charged separately. Performance improvements were also made to the back-end code. |

| LIQ-4359 | **User experience improvement/correction made to the delete buttons in the CB Reporting panel.** |
|---|---|

| LIQ-4352 | **qlevels do not change sometimes when payments are processed** |
|---|---|
| | Twas a bug in batch-processor which caused some events to go unhandled, static registration needed for batch-processor is corrected |

| LIQ-4336 | **Hold All Now Works with Direct Debit Wallet Item** |
|---|---|
| | Direct Debits are now wallet items. You can use "Hold All" to put all arrangements that use Direct Debit on hold. |

| LIQ-4310 | **Sometimes payments that were completed do not get batched into payhistory when using the Batch Processor and have error logged "Unable to establish an IInvoiceFlagsSelector".** |
|---|---|
| | Changes were made that should prevent scheduled payments remaining stuck in 'Completed' status and not being created in the payhistory table due to the "Unable to establish an IInvoiceFlagsSelector" error. |

| LIQ-4305 | **Bug fix where phones wouldn't appear in Customer anchor.** |
|---|---|
| | Phones will now appear in the Customer anchor. |

| LIQ-4303 | **Users can now invalidate insurance records via the workform.** |
|---|---|
| | 3 fields were added to the insurance table, Invalid, InvalidReason, and TimelyFiling to accomodate various functionality associated with marking insurance records as invalid. |

| LIQ-4302 | **Medical panel is now editable** |
|---|---|
| | Changes were implemented that allow the user to save patient info data from the medical panel UI. |

| LIQ-4301 | **Users can now edit insurance records from the workform.** |
|---|---|
| | Provided the user has permission to view the medical panel, the button to edit insurance records will appear on each entry that appears in the panel, allowing them to edit them with the same requirements as adding a record. |

| LIQ-4298 | **Users can now add insurance records from the workform.** |
|---|---|
| | If a user has access to the medical panel, they can now add insurance records via a modal button in the workform. |

**LIQ-4297**      **Increased the length of the patient Id text box**

Increased the length of the patient Id text box to allow the user to see patientIds that approached the maximum size of the database field.

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

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

**LIQ-4253**      **Fixed manual linking so that when you un-link an account, the Queue Level is changed to the appropriate aging Queue Level**

Aging Queue Levels:
* 020 - Accounts 0-30 days old - Based on received date of the account
* 030 - Accounts 31-60 days old - Based on received date of the account
* 060 - Accounts 61-90 days old - Based on received date of the account
* 090 - Accounts 91-120 days old - Based on received date of the account
* 120 - Accounts over 121 days old - Based on received date of the account

**LIQ-4215**      **Payments spread through Payment Entry will not update the status after being processed.**

Payments spread through Payment Entry will update the status after being processed.

**LIQ-4207**      **Fixed an issue where if the street1 field on the debtors table was over 30 characters, accounts could not be linked due to an error.**

The debtors data object didn't match the table schema, the character limit on the data object has been updated to match the schema.

**LIQ-4195**      **Fix made in Balance Details pane in the workform.**

The balance details pane was not updating appropriately when an account was popped. This has now been corrected.

**LIQ-4148**      **Decline event was posting twice**

A decline event was being posted a second time, instead of the qlevel event - this is now fixed, there will be one decline event, and one qlevel event (if indicated by the decline scenario)

**LIQ-4114**      **Permission added to change the status and qlevel of accounts whose promises are broken called 'Configuration for handling Broken Promises'.**

There is a new system-level permission located under Configuration\Payment Processing to allow the user to select a status and qLevel that accounts whose promises are broken by the custodian stored procedure ScheduledPaymentResultMerge.

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

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

**LIQ-4013**      **instability of some features, which appears to change for each release**

stability issue was fixed in the trace facility which should eliminate these issues. In SU04, the extra data controller was affected.

**LIQ-3831**      **Letter request recipient does not default when requesting a letter**

A change was implemented for the letter request recipient to no longer default to the first debtor in the list, instead it remains undefined until the user selects a debtor manually. This field is now marked as required in the UI.

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

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

**LIQ-3794**      **Manual status updates from the workform toolbar now supports mass updates of linked accounts.**

When a global configuration setting is set users will be able to do updates to the account status in mass for

the selected linked accounts.

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

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### Component: Liquid Portal
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**LIQ-4365**   **extra data panel does not show, reports error**
A stability issue was present which caused arbitrary errors in unrelated components, was fixed globally in LIQ-4013 concurrently.

## Changes in 3.0 SU 4

| SCR | Description/Details |
|---|---|

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

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

**LIQ-4261**   **Subject Debtor fields not populating due to using new Collector/Liquid tables.**
Modify code and SQL procedures to populate Subject Debtor fields.

**LIQ-4242**   **Forced deletes not making it through to the final result due to order of precedence in respective coalesce statement.**
Altered order precedence for the status determination to correct. DA will now be allowed to be forced via the master.specialnote method.

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

**LIQ-4184**   **The Last Payment Date field for PDC not showing in letters.**
For letters, the Last Entered dates for Promises, PDCs and Credit Cards now are sourced from the new consolidated ScheduledPayment table.

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

**LIQ-4128**   **Correction to main Linking process to prevent looping due to configuration settings.**
The link column on master was not being set to zero when linking was unsuccessful. Corrected the main procedure.

**LIQ-4080**   **CBR - Correction to allow for the proper reporting of the compliance condition code.**
Altered function cbrAccountHistory to provide historical and pending compliancecondition codes to the evaluation which corrects the reporting error in the linked scr

**LIQ-4031**   **Change made to account status and qlevel updates on payment reversals.**
When a payment reversal occurs in the Payment Manger application (not a correction). The account status is updated to NSF on all linked accounts, and the qlevel is updated to 012 for the driver account. The qlevel on

passenger accounts remains at 875.

**LIQ-4016**

**Altered SIF functionality to add configuration ability through the SIFConfig table. Fixes erroneous SIFs, provides ability to SIF Promise Arrangements, offers granular configuration for clients regarding their SIF rules.**

A new Table (dbo.SIFConfig) has been added that stores the configuration of whether an Arrangement and its initial parameters (StartDate, EndDate, SIF Amount) can still be used to SIF an account when processing a payment.

As Arrangements can have multiple parts and each part in one of many states (Successful, Unsuccessful, OnHold, Scheduled, Cancelled) - Configuration can be set for any possible combination of the states.

This will allow Clients to choose the situations that they will allow SIFing of an Account.

The default configuration is set to only SIF if there have been no Cancelled or Unsuccessful payments in the arrangement.

In the future, the dbo.SIFConfig table will be moved to policy for easier configuration.

Technical Details for dbo.SIFConfig
BitSum = the SUM of the DISTINCT statuses of the ScheduledPayment records in the Arrangment
SIF = bit field that determines if the Arrangement can be used to SIF

BitSum is calculated as follows
Batched = 1, Completed(promise only) = 1, Cancelled = 2, Declined = 4, Bounced = 4, OnHold = 8, Scheduled = 16
Algorithm finds the distinct statuses above and sums them up
This sum corresponds to the BitSum field in dbo.SIFConfig and SIF flag is used to determine if account can be SIFd if the NET SUM of payments is >= SIF Amount on the Arrangement

Linked Account Arrangements are also supported

**LIQ-3938**

**field added to Phones_Types table, which controls consent requirement level. The views which control ListBuilder's filtering are updated to honour consent flags in the Phones_Consent table.**

ListBuilder must honour the consent flags in the Phones_Consent table, to filter out any phone numbers which do not have consent. Consent may be implicit or explicit - implicit just means that there is no denial of consent, where explicit means that there is a positive consent set. The Phones_Types table has a new field ExplicitConsentRequired which indicates if that phone type should only be used if it has explicit consent.

**LIQ-3932**

**Additional capability was added to the database build process to produce a standard and enterprise edition update package and model database.**

When running DBupdate you will need to choose the apprpriate file for your sql server version.

**LIQ-3895**

**Note imports in AIM / Receiver are not communicating the UtcCreated value correctly.**

AIM/ Receiver will send UTCCreated for the datetime parameters used to create a note.

**LIQ-3883**

**"Operation illegal on a linked parameter" error on Parent_BasicInvoice fixed**

Parent_BasicInvoice error Operation illegal on a linked parameter fix for report.

**LIQ-3860**

**CarrierFax and CarrierPhone are now stored in the Insurance record with the appropriate other data**

Previously these fields were stored in MiscExtra fields, we are now storing them on the table with the associated record.

**LIQ-3840**

**This fixes the problem in which accounts linked after the initial NITD letter is sent out on the link driver do not get an NITD letter.**

A new workflow step will be required called in "Account Linked" that calls Letter_CreateLetterRequests

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

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

the workflow in this case.

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|---|---|
| **LIQ-3810** | **Affects performance on queries against the AccountLabel table** |
| | Added an index on AccountId |

| | |
|---|---|
| **LIQ-3808** | **New Trigger added for evaluation of 'Promise Broken' on record update** |
| | There is now a separate trigger for the 'Promise Broken' workflow event. |

| | |
|---|---|
| **LIQ-3788** | **Linking performance issue** |
| | Added index to JoinedDebtorId on debtors table |

| | |
|---|---|
| **LIQ-3734** | **When running cbr wizzard, get error: Could not find stored procedure 'cbrEvaluate'** |
| | replaced missing stored procedure |

| | |
|---|---|
| **LIQ-3722** | **Issue affecting Manual Payment Entry promises tab displaying other types of scheduled payments.** |
| | Corrected view to exclude all sheduled payments but Promises |

| | |
|---|---|
| **LIQ-3694** | **Insured County, Insured Country, Carrier Country and Carrier county fields added to the insurance table** |
| | There are two addresses stored in the insurance table, and to follow the model of what addresses are stored as elsewhere in the database these four fields have been added. |

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

| | |
|---|---|
| **LIQ-3596** | **Address Email migration script using new Debtor Association tables.** |
| | Custom script to update older databases for use in Liquid. Uses new Debtor Association tables. Not part of dbupdate - needs to be run manually. |

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

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### Component: Infrastructure

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|---|---|
| **LIQ-4038** | **When attempting to reverse a payment using a payment link uid the command may throw an exception seen in Exchange.** |
| | Reversals through Exchange should not cause an error executing command that is seen in the history. |

| | |
|---|---|
| **LIQ-4014** | **Modified Latitude.Core.Payments such that completed scheduled payments will not be** |

**picked up until the due day.**

The Batch Processor will no filter scheduled payments that are completed such that they are only picked up if the due day is less than or equal to the run date.

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**LIQ-3855**    **Adding insurance through Exchange results in an error. The stored proc that inserts is being sent parameters that are not defined.**

Insurance can now be added through Exchange.

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**LIQ-3771**    **User is now warned if there are more than one debtor joined to the debtor selected in the manual linking dialog.**

Previously there was no indication of if the debtor selected in the dialog was joined.

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**LIQ-3510**    **Address and email fields on the customer information task panel are now disabled by default.**

Address and email fields on the customer information task panel are now disabled by default. Customers are encouraged to use the address panel to manage addresses

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**LIQ-3501**    **Make Email Type database driven**

Make Email Type database driven.

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**LIQ-3478**    **The way Reversals work in Exchange has been adjusted.**

1, When mapping to postdateuid it needs to reverse all payments that have the given post date uid IF no other payments using that postdateuid have been reversed.
2. If the payment spread option is turned off it needs to locate one payment to reverse. If the payment that is being reversed was part of a spread payment it cannot be reversed.
3. If the payment spread option is turned on it needs to locate all the payments that match the given criteria grouping them by paymentlinkuid and reverse them all. If any payments within the link are reversed it is seen as an error.

All reversal candidates are the most recent payment ordered by the most recent EnteredDate and uid.

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### Component: Liquid Center

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**LIQ-4399**    **Class of business dropdown should now correctly display classes of business in the client configuration section of administration**

There was an issue with the way that the class of business dropdown was calling hte server, and was getting paged results for the dropdown, causing several/all of the options to not disppear or map correctly in the administration tool.

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**LIQ-4386**

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**LIQ-4319**    **Error when editing arrangements and changing payment method to promise.**

There was an exception occurring when editing an arrangement and changing from a payment method of credit card (or any other method in the pmethod table) to promise.

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**LIQ-4314**    **When entering arrangement across linked accounts using the Even spread selection, it would not spread correctly.**

Even spread now works correctly.

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**LIQ-4310**    **Sometimes payments that were completed do not get batched into payhistory when using the Batch Processor and have error logged "Unable to establish an IInvoiceFlagsSelector".**

Changes were made that should prevent scheduled payments remaining stuck in 'Completed' status and not being created in the payhistory table due to the "Unable to establish an IInvoiceFlagsSelector" error.

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**LIQ-4305**    **Bug fix where phones wouldn't appear in Customer anchor.**

Phones will now appear in the Customer anchor.

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**LIQ-4304**    **Warnings error in the workform**

The Warnings feature in the workform was erroring when there was no state (address) set for the debtor.

**LIQ-4283**     **Edge case resolved when popping accounts in the workform.**

When an account was popped in the workform that had responsible codebtors that were joined to non-responsible debtors on other accounts, an exception would occur that would cause problems with the loading of data for that account. This has now been resolved.

**LIQ-4269**     **CBR Evaluate button added to the CB Reporting Panel**

A new button has been added to the CB Reporting panel in the account information tab to evaluate accounts on demand. This process is heavy and can be long running depending on the size of the database, therefore should be used sparingly.

**LIQ-4268**     **Under some conditions the payment process was adding the payment multiple times to an account.**

This is has been corrected and a single payment will only result in one payment posted against account.

**LIQ-4258**     **Displays $0.00 instead of Will be Calculated when surcharges are suppressed.**

**LIQ-4247**     **"Next Payment Batch" text box removed.**

**LIQ-4228**     **When setting up a SIF arrangement, when the user saves the arrangement with an amount under the minimum settlement amount, the Min SIF permission is ignored and the user is able to Approve/Deny the arrangement.**

Settlement approval now respects the restrictions based on permissions.

**LIQ-4224**     **Fix implemented for missing data in the CB Reporting Panel summary tab.**

An error was occurring in the CB Reporting panel summary tab that was causing data not to display. This was due to a bug. It has now been corrected.

**LIQ-4210**     **Found issue with Javascript math in arrangements panel**

Change calculation routines for the Arrangements panel to account for odd math in javascript itself.\
For example, 9.97*100=997.0000000000001 in javascript. 9.98*100=998!

**LIQ-4208**     **Closed accounts are no longer moved to an active status when added to a link.**

Closed accounts are no longer moved to an active status when added to a link. This was causing accounts to incorrectly queue.

**LIQ-4207**     **Fixed an issue where if the street1 field on the debtors table was over 30 characters, accounts could not be linked due to an error.**

The debtors data object didn't match the table schema, the character limit on the data object has been updated to match the schema.

**LIQ-4204**     **Any time an agent takes an action requires data on the workform to update, unsaved Hot Notes would be lost.**

Conditions were introduced to prevent the hot notes data from being lost when a refresh happens that does not require a different account to pop. The refresh event will also no longer display in the Events panel.

**LIQ-4200**     **The workform makes checks against the incorrect field to indicate if there is a hold on the account. Checks should be made against all possible hold methods to determine if there is a hold against the account or debtor.**

The CollectionHold table provides a more accurate assessment of holds on the account and will be used for both debtors and master records to reflect a hold on the workform.

**LIQ-4189**     **Fix implemented in clerical and supervisor queues.**

A fix was implemented that allows the clerical and supervisor queues to function appropriately when there are accounts in multiple queues simultaneously.

**LIQ-4186**     **The "Hold on Account" flag in the Account Status anchor card was being raised under a condition where the account was not in a queue instead of actively having a hold against**

**it.**

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

| LIQ-4185 | **There were certain situations in which creating an entry in the dbo.paymentbatches table could result in an error due to a race condition.** |
| --- | --- |

When processing finiancial transactions the next batch number used is seeded from the dbo.Sys_NextRef table. This will avoid errors that can occur with the same batch number being used.

| LIQ-4151 | **When a new note is added, the event being generated does not contain the correct value for NoteId** |
| --- | --- |

Now when a new note is added the event being generated has the actual noteid value.

| LIQ-4136 | **QLevel fix for when an account goes from closed to open via a status change.** |
| --- | --- |

A change was made so that when an non-driver linked account goes from closed to open via a status change, the qlevel gets changed back to 875.

| LIQ-4121 | **Closed accounts are no longer moved to an active status when added to a link.** |
| --- | --- |

Closed accounts are no longer moved to an active status when added to a link. This was causing accounts to incorrectly queue.

| LIQ-4120 | **Link driver fix made in manual linking** |
| --- | --- |

Link driver was incorrectly getting set when manually linking two sets of linked accounts. A fix was implemented for the link driver that was originally set on the focused link-set during manual linking, to remain the link driver.

| LIQ-4113 | **New statuses added in administration now default to a status type of active.** |
| --- | --- |

Status configuration in administration no longer allows for null status types to get entered into the database. The value of the isClosed field defaults to false (and 0-Active in the database).

| LIQ-4112 | **Reversals added though collector do not adjust the status, qlevel or adjust the scheduled payment that was tied to the payment that is being reversed.** |
| --- | --- |

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

| LIQ-4108 | **UX improvement to CBR Panel** |
| --- | --- |

When a compliance condition has been previously reported, it shows in the pending record until a new value is saved, to be reported the next time the wizard is run.

| LIQ-4106 | **Fix implemented for Events panel sorting.** |
| --- | --- |

A fix was implemented to the events panel to properly sort event records by Occurred, descending.

| LIQ-4102 | **Can now look up an ABA number given bank information (Phone number, Address, or Name) from the wallet selection/add/lookup screen. Also better error message display when errors occur in the wallet controller.** |
| --- | --- |

ABA routing numbers can now be looked up when the user inputs various fields of the ABA table, Name, Address, and phone number of the bank.

| LIQ-4100 | **Sometimes payments that were completed do not get batched into payhistory when using the Batch Processor due to username being longer than field allows.** |
| --- | --- |

Changes were made that should prevent scheduled payments remaining stuck in 'Completed' status and not being created in the payhistory table caused by the "data would be truncated error".

| LIQ-4094 | **Events will now show the correct time stamp** |
| --- | --- |

Events will now show the correct time stamp

| LIQ-4091 | **Fix implemented in manual linking** |
| --- | --- |

In manual linking an exception was occuring when trying to link two driver accounts each with their own

links. This has now been corrected.

**LIQ-4090**  **Added a condition that checks for closed statuses based on QLevel when updating account status after an arrangement is deleted.**

Previously the status and Qlevel were getting overwritten whenever an account was in a payment group that had its arrangement canceled.

**LIQ-4088**  **No longer able to delete comments.**

When adding a new comment all that is allowed is the initial save. No editing or deleting.

**LIQ-4084**  **Fix implemented to display the correct debtor information in the customer task panel.**

When multiple debtors were joined, the customer task panel was always displaying the debtor information for the first debtor in the group. This has now been corrected.

**LIQ-4083**  **Change made to Party Navigator Anchor**

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

**LIQ-4082**  **Visual indicators added to the workform to distinguish between Joined and Linked accounts.**

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

**LIQ-4070**  **POSSIBLE BREAKING CHANGE: Configuring Access for Multiple Users to Same Account**

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

**LIQ-4061**  **Change made to automatically refresh the account data when an account status is changed.**

A change was implemented to automatically refresh the account data when the account status is changed. The Account Navigator anchor was not updating its totals when an account was closed without a hard refresh. This change corrects that issue.

**LIQ-4053**  **Link driver icon added to account navigator anchor card**

An icon has been added to the account navigator anchor card to indicate that an account is a link driver.

**LIQ-4045**  **Update made stored procedure for when accounts are SIFd**

A change was implemented to treat the locked status like batched/completed

**LIQ-4034**  **CSS styling change made to fix UI problem in payment history panel.**

A css change was made to the payment history panel to fix multiple elements overlapping in a way that made it difficult to read the grid data.

**LIQ-4030**  **Fixed a console error throwing on the client when there wasn't an insurance record for an account.**

Check has been implemented before trying to interate over a collection that wasn't populated on the client when there is no insurance record for the account.

**LIQ-4025**  **Email not getting updated in customer task panel when new primary email is added.**

Code was added to the customer task panel to update the email address in the UI whenever a new primary email is added from the email reference panel.

**LIQ-4018**  **Optimized GetPaymentMethodVerbiage**

GetPaymentMethodVerbiage has been optimized so the payment verbiage can return without causing a spike in the CPU on the server which resulted from an inner join on ScheduledPaymentDetail. This was removed because of the restrictions on arrangements.

**LIQ-4013**  **instability of some features, which appears to change for each release**

stability issue was fixed in the trace facility which should eliminate these issues. In SU04, the extra data controller was affected.

**LIQ-4012**  **Optimized GetPaymentMethodVerbiage**

GetPaymentMethodVerbiage has been optimized so the payment verbiage can return without causing a spike in the CPU on the server which resulted from an inner join on ScheduledPaymhentDetail. This was removed because of the restrictions on arrangements.

**LIQ-4011**  **Payments History Panel now handles 100+ payments**

The Payment History Panel had a bug which prevented it from displaying more than 100 payments. This has been corrected.

**LIQ-4010**  **DPA events modified to be associated with the correct interaction**

DPA events now are handled like standard interaction events, and will fall under the current interaction for the account on which the DPA is validated.

**LIQ-4004**  **having vendor information (ACH,CC,PD) set at the system level is no longer necessary for closebatch to complete correctly**

In the original implementation of the PVG CloseBatch call, vendor information could only be configured at the system scope, and if it was missing there, then the batch process would fail at the very end. The first stage solution to this problem (this fix here), first we test for system scope, and if that fails, then we pick a payment (arbitrarily) in the batch (by batch number), and then use the account(s) of that payment to select vendor information (by client, client-group, or business-class) by customer scope. Ideally at some future point, there will be a stage 2 solution which operates on the complete intersection of batch number and vendor information for all payments in that vendor batch.

**LIQ-3998**  **When arrangements or payments occur the account status is now updated**

When a user creates/updates/deletes and arrangement or processes a payment the account status (along with the account qlevel) is updated.

**LIQ-3997**  **Scheduled payments were being placed on hold when there were future scheduled payments in the details table related to accounts that were not yet candidates to be closed or PIF'd.**

Scheduled payments are not being placed on hold when there were future scheduled payments in the details table related to accounts that were not yet candidates to be closed or PIF'd. There is also a note created showing the scheduled payments were placed on hold for the 'source' account that is stored in the scheduled payments table.

**LIQ-3994**  **Implemented server-side paging on the account history panel**

Reduced query expensiveness. Accounts in history now load 10 at a time, ordered by the most recent date first.

**LIQ-3990**  **Refactored inventory endpoint to correctly display all statuses, and added server-side paging to alleviate performance issues.**

Added server-side paging and now displays and filters by status.

**LIQ-3960**  **Code added to conditionally disable the CB Reporting Remove Codebtor button.**

A condition was added to the remove codebtor button in the CB Reporting panel. When the user removes the codebtor, the button will now be disabled until the account is reported and the debtor is officially removed.

**LIQ-3957**  **Changing the payment type of an arrangement now able to change from Credit Card to a Promise.**

There was an issue with the check on the wallet item checking for the incorrect id value when passing an arrangement task to the AlterScheduledPayment method.

**LIQ-3954**  **Fix implemented to display the correct address information in the customer task panel.**

When multiple debtors were joined, the customer task panel was always displaying the debtor information for the first debtor in the group. This has now been corrected.

**LIQ-3953**  **Added a disable button attribute to the "Next" in Queue button on the toolbar to prevent requests being sent prematurely.**

Next in queue was being requested before the parameters to the endpoint were loaded on the client, causing a bad request error.

**LIQ-3951**  **Arrangements can now be deleted while looking at any account that they are relevant for.**

Previously, the 'Delete All' button on the arrangements panel wouldn't delete any scheduled payments if the scheduledpayment record didn't match the account that was currently focused. This has been fixed via adding a parameter to the function call that gathers the scheduedpayments to make sure they are valid for the focused account and they now properly delete.

**LIQ-3943**  **Changed functionality of workform 'close' button.**

The close button in the toolbar now functions for closing an account and closing a queue. The label on the button changes accordingly.

**LIQ-3940**  **User can select XR to clear out compliance condition on an unreported account.**

Users can now clear out compliance condition on an account that has not been reported by selecting XR. If XR is selected on an already reported account, the XR code is stored and sent the next time the account is reported.

**LIQ-3928**  **Manual linking now accounts for single accounts having a linkdriver value set.**

Previously there was an assumption that accounts that were not part of a link could not have a linkdriver. The command handler now recognizes that you can have a linkDriver for one account and links them properly to the selected link.

**LIQ-3918**  **Fixed the rounding on several fields in arrangements panel.**

Some of the arrangements were having weird behavior when assigning values to the amount and original fields.

**LIQ-3915**  **Updated the query used to gather accounts for Collector Queue to be more efficient.**

Removed several table variables, change some where clauses, and removed redundant joins on smaller tables.

**LIQ-3913**  **Payments were not always being sorted correctly in the Payment Negotiator.**

Payments are now being sorted correctly by when they're scheduled to occur in the Payment Negotiator.

**LIQ-3912**  **Paging wasn't showing up in some situations on the Payment Negotiator**

Paging has been corrected to show up on the payment Negotiator.

**LIQ-3908**  **There is an API 'SetFollowUp' called twice on form submit**

Code fix implemented to get rid of a console error and redundant api call.

**LIQ-3907**  **When manually removing an account from a link, the ScheduledPaymentDetails table wasn't being queried for linked accounts.**

When you create an arrangement for linked accounts, a record is not inserted into scheduledpayment for each account, those accountsIds are stored in ScheduledPaymentDetails. A join was added to check the Id in the Details table, and then check the status of the records with the correct accountId on the ScheduledPayment record.

**LIQ-3906**  **Fixed several of the conditions for manual linking not checking for links with an id of 0**

Several of the conditions that verified which path to follow for adding linkIds were incorrect and updating accounts at the wrong time/with the wrong value.

**LIQ-3903**  **endpoints querying linkid were missing conditions to exclude invalid accounts.**

'link' values of 0 and null are not considered linked accounts. This was causing larger table reads than necessary and timeouts in the workform.

**LIQ-3894**  **Accounts with open Complaints / Disputes / Cares will not print Letters unless Allow Account override is clicked for the Letter**

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

**LIQ-3893**   **Fixed not being able to select a secondary address in the DPA screen**

Previously when two seperate addresses were present in DPA, the second one was unable to be selected due to a loading issue of the data.

**LIQ-3892**   **Sort columns on payhistory panel now functioning**

There was an issue with some of the column names in the markup for the panel that was causing several of the columns not to sort.

**LIQ-3890**   **Fixed manual linking so that when you un-link an account, the Queue Level is changed to the appropriate aging Queue Level**

Aging Queue Levels:
* 020 - Accounts 0-30 days old - Based on received date of the account
* 030 - Accounts 31-60 days old - Based on received date of the account
* 060 - Accounts 61-90 days old - Based on received date of the account
* 090 - Accounts 91-120 days old - Based on received date of the account
* 120 - Accounts over 121 days old - Based on received date of the account

**LIQ-3881**   **Fixes an issue with the Collector Queue**

A bug is fixed that prevented the Collector Queue from opening on desks whose codes had more than 7 characters.

**LIQ-3880**   **CBR audit data display order changed**

In the CB Reporting panel the audit data is now sorted descending with the most recent date displaying at the top of the grid.

**LIQ-3876**   **Balance Detail overpaid amount was pointing at the wrong object property**

Fixed by moving the summation of CreditBalance outside of where bucket iteration happened, as there is only one CreditBalance value per account, not per bucket.

**LIQ-3868**   **Migrated the Medical Panel from a custom stream to the core install.**

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

**LIQ-3866**   **Text change for reminders error message.**

Text for the error message in reminders was updated to say "The reminder date must be within the time period indicated by the maximum days set for the selected desk."

**LIQ-3853**   **Added Garnishment, Bankruptcy, and Court Case # as quicksearch options**

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

**LIQ-3849**   **Dismissing reminders will change queue level to 599**

Dismissing reminders previously left an accounts queue level at 000, an change has been implemented that updates it to 599.

**LIQ-3846**   **Functionality added to the Letters panel in the workform**

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

**LIQ-3841**   **Courtcase and Garnishment quicksearch option now correctly query records.**

The aliased tablenames weren't used when appending the WHERE clause to the quicksearch query.

**LIQ-3839**   **Medical panel now refreshes when a new account is loaded and it's the default reference panel.**

Previously the medical panel wouldn't refresh when a new account was loaded and the panel; was set as the default. Now it has the watch on the correct service method.

**LIQ-3833**   **LinkIds are now being set correctly when a debtor doesn't have a joinedDebtorId**

Manual linking didn't have a constraint for JoineddebtorIds having a null or zero joineddebtorId, and was setting the LinkId when the debtors weren't joined for large numbers of accounts (for example, all accounts

that had a linkId of 0 or null, which was upwards of 3k accounts in the test environments).

**LIQ-3829**     **Performance fix for linkchargedoff endpoint.**

The linkchagedoff endpoint ran incredibly slow (minutes on small data sets, projected to hours on larger data sets) if master.link was null on a significant number of accounts. This fix adds a null check and now the endpoint runs immediately.

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

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

**LIQ-3800**     **Additional logic for properly updating customers with no parent client codes.**

CustGroup field on customers was being changed to "null" if no modifications were applied and the customer record is saved in administration. There is now a method that applies the correct value (NULL as opposed to a string containing "null").

**LIQ-3799**     **Workform now refreshes after processing a payment from the arrangements panel**

When an account was PIF'd the statuses in the account navigator anchor were not updating appropriately (there wasn't exactly an event and the ocntext service now refreshes after a payment is made).

**LIQ-3793**     **Text change for state warnings**

The text for state warnings has been changed from {name} lives in state {state name} to {name} lives in the state of {state name}

**LIQ-3779**     **Stability issues when a large number of accounts are linked.**

A patch has been implemented to help with the stability issues that were happening when trying to pop accounts with a large number of linked accounts.

**LIQ-3778**     **Total paid on Chargedoff account anchor no longer adding the amount overpaid to the paid balance.**

Previously the chargedoff details anchor was Adding the additional ammount overpaid on the account to the totalpaid value twice (if the totalpaid value had a value less than zero). This was causing an issue.

**LIQ-3777**     **Payments now appear correctly in the arrangements panel**

there was a stored procedure making the status of arrangements invalid.

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

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

**LIQ-3773**     **Bug fix for removing codebtors from CB Reporting panel**

A fix was implemented to allow the user to remove a codebtor from credit bureau reporting within the CB Reporting panel.

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

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

**LIQ-3752**     **File # added to link details panel.**

Previously the Link Details panel only showed the customer account number, which was inconsistent and confusing when compared with other areas of the workform that display lists of linked accounts.

**LIQ-3733**     **Events panel paging sorting fixed**

There was a bug in the Events panel where the date of each event was being interpreted incorrectly. Sorting and paging should now work correctly.

**LIQ-3732**     **Account Peeked event removed from displaying in the Interactions Panel**

When an account has many links an account peeked event is generated for each of those linked accounts when one is popped in the workform. This event is now hidden from display in the Interactions Panel.

**LIQ-3731**    **Update made to ordering of reminders**
Reminders are now ordered by due date, then accountId

**LIQ-3726**    **Ordering linked account display in the workform by open accounts first, then ordering by received date.**
Added Received date to the fields being returned for accounts to the client, the ordered by them.

**LIQ-3724**    **Manual linking now associates debtors to align with joineddebtor relationships**
Debtors are now associated in the same fashion as they are linked when using the manual linking tool

**LIQ-3723**    **Manual linking now updates the "link" value on master accordingly to keep in line with the concept of "linked" accounts.**
Links are now maintained if the debtors selected in the modal are primary on the account.

**LIQ-3720**    **Coloration of the Accounts to select from wasn't updating correctly and was getting overwritten.**
Moved all conditional styling logic the the getAccountLabelStyle function to avoid bolding the focused account overwriting the Red or black styling.

**LIQ-3713**    **Arrangements date picker now showing correct days greyed out**
A fix was implemented to the arrangements panel, the datepicker now greys out the appropriate days on the calendar regardless of what timezone you are in.

**LIQ-3711**    **User can view new letters without refreshing account**
This fix allows users to view newly requested letters in the pending letters panel without having to refresh the account first.

**LIQ-3710**    **Columns in the account navigator anchor were misaligned and were difficult to read**
fixed alignment of account navigator columns

**LIQ-3709**    **Behavior fix when correspondence flag is changed on an address**
A fix has been implemented so when an address is set to be the correspondence address for a debtor, it properly displays in all other areas of the workform. Also when the correspondence flag gets switched to false for an address the fields in the debtor record get nulled out.

**LIQ-3708**    **DPA now passes/completes when user doesn't select a caller name**
Fixed an issue with how the dpa post endpoint was mapping the callername to the event.

**LIQ-3706**    **The Collector Queue currently loads all account Id's in memory, causing each request to take 10 - 30 minutes to process when there are lots of accounts. This is now fixed.**
The Collector Queue endpoints previously used Entity Framework to do their database querying. This fix refactors it to use raw SQL, instead, which makes it run much faster. Additionally it no longer pulls all the account ids into memory - it grabs only the next account Id that it finds and a count of the remaining.

**LIQ-3705**    **Multiple versions of the same note could be added if the save button was clicked multiple times while adding a note.**
Save button is now disabled if the form controller is "busy"

**LIQ-3704**    **Qlevel now changes when account reminders are created.**
When an account reminder is created the queue level for the account is updated to "000".

**LIQ-3703**    **"Attorney" removal logic from warnings no longer trims last several characters from warnings**
A feature from Capquest was left in during the DPA migration and was removing parts of warnings that did not need to get removed. That logic has been removed and now all warnings are always being displayed with what is in the database in the DPA panel.

**LIQ-3702**    **City names longer than about 15 characters are now visible in city fields in the workform.**

The textbox size for the City field on the lat-address directive was a bit small. changed it to be larger.

| LIQ-3701 | **The Link Details panel was uncomfortably long when large nubmers of linked accounts were loaded.** |
|---|---|

Added a fixed height/scroll bar to the link details panel, to ease displaying large numbers of linked accounts.

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

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

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

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

| LIQ-3688 | **Added an insert to the note table for broken promises in ScheduledpaymentResultMerge Custodian stored procedure.** |
|---|---|

previously there was no insert for a note in the ScheduledpaymentResultMerge Custodian stored procedure.

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

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

| LIQ-3684 | **a trigger was updating scheduled payments with a status of ON HOLD, which is not a valid status.** |
|---|---|

The endpoint gathering the scheduledpayment records was failing due to an incorrectly cased/spaced status code being inserted by a trigger.

| LIQ-3683 | **The notes panel now refreshes the accountId when navigating to another account in the workform.** |
|---|---|

In a previous update linked account support was added to the notes panel to allow the user to view notes from all accounts under the same linkId. A change was made that made it so when you popped another account while viewing another, the notes panel would not refresh and display notes for the correct account(s) when the panel is loaded.

| LIQ-3682 | **Fixing the arrangements panel getting distorted with a large amount of accounts.** |
|---|---|

Added a scroll bar and a max height to the linked accounts area of the arrangements panel, and a select all button to ease the process of creating arrangements for larger numbers of accounts.

| LIQ-3674 | **Fixed payment series set to 'weekly' for the frequency all getting set to the same date.** |
|---|---|

The initialization of the variable storing the frequency wasn't properly getting updated when the mode changed from single to multiple, causing the date to not be iterated upon/increased for each payment in the series.

| LIQ-3671 | **Displaying large numbers of linked accounts on the Account Navigator anchor and Arrangements panel was causing UI issues with stretching the workform height.** |
|---|---|

The header and footer of the Account Navigator anchor card is now fixed. This allows for the user to see the column headings and balance summary no matter where in the list of linked accounts they are.
The Arrangements panel now has a fixed height and a scroll wheel in the linked account list when the height exceeds a certain number of accounts, and was missing the Customer Account Number and status of the account. Also being added is a select all button for large numbers of linked accounts to ease the process of selecting accounts for arrangements.

| LIQ-3670 | **Typo in the error message stating the permission was missing and that that account will NOW be reported.** |
|---|---|

NOW has been changed to NOT.

| LIQ-3666 | **CBR Exceptions displayed in CB Reporting Panel** |
|---|---|

The cbr account and debtor exceptions are now available in the summary tab of the CB Reporting panel.

**LIQ-3665**  **Liquid does not use the tables from Classic that were used to populate Subject Debtor info.**
Created new table to hold Subject Debtor data.

**LIQ-3660**  **Removed single interaction per account restriction**
Multiple users can access the same account

**LIQ-3658**  **Queue level change when accounts are manually linked**
Queue level for the selected linked account is changed to 875 when linked using the manual linking tool in the workform. When manually unlinked it is changed to 015.

**LIQ-3635**  **correct issue with multiple create operations being submitted simultaneously**
suspicious WhenAll call changed to foreach structure

**LIQ-3627**  **Balance Details current balance and balance history (for charged off and not charged off accounts) now displays balance information for all linked accounts.**
Balance Details and balance history panels were only showing the blance information for the focused account. This change adds support to toggle between viewing the focused account and the summation of all of the other accounts linked to the focused one.

**LIQ-3624**  **Added Medical panel to Collector**
Panel is readonly for phase I

**LIQ-3621**  **Fixed notes not loading on initial page load when it was the default reference panel.**
Fixing the debtorId not being populated on initial notes http request.

**LIQ-3599**  **Implemented paging on the Misc. Extra reference panel**
Displays ten records per request/page, sorted by the Key field of Misc. Extra

**LIQ-3595**  **No longer displays duplicated addresses with no party name**
Address panel now correctly displays addresses when there are multiple debtors on the account.

**LIQ-3594**  **Provide full letter functionality**
The Letters panel now provides the intended functionality.

**LIQ-3581**  **Address mail Mail Return not set correctly under certain circumstances**
The Mail Return flag is set dependent on the status of the address.

**LIQ-3579**  **Receiving following error when trying to populate an account by file number via Quick Search: Procedure or function AccountUpdate has too many arguments specified.**
Corrected issue so this is no longer a problem

**LIQ-3575**  **Primary flag was getting removed when changing the type of an Eamil Address**
Email query that gathers email records to change them FROM primary when a new one is selected now excludes the record that is currently being modified.

**LIQ-3566**  **Notes panel displays all notes for linked accounts.**
The notes panel now shows all notes for linked accounts of the currently focused one, and has a new filter to only show selected accounts' notes.

**LIQ-3557**  **new care and financial hardship records did not get created for new care records that had the confirmed flag set when created.**
Care and Hardship records that are created with the confirmed flag set to true will result in a collectionhold record.

**LIQ-3547**  **Inappropriate vendors showing in PVG configuration**

Was showing all vendors for every type, now dispays only vendors of the appropriate type for ACH and CC.

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

**LIQ-3538**       **Account shows the 'Account on hold' banner but it appears the account is not on hold**
This was occurring when a hold was removed due to some activity on the account while the account is open in a collector screen.

**LIQ-3518**       **Allows phone numbers to be dialed**
Allows phone numbers to be dialed

**LIQ-3515**       **First/Last names are no longer required when utilizing a business name**
First/Last names are no longer required when utilizing a business name.

**LIQ-3514**       **Party navigation anchor card had consumers that were not sorted by sequence number**
Party navigation anchor card now has consumers sorted by sequence number

**LIQ-3492**       **Credit Bureau Reporting panel.**
Credit Bureau reporting panel that allows users to Extend, Report, Delete (account/codebtor), and view detail data for accounts being reported.

**LIQ-3489**       **The Debtors.Name field is now 300 Characters long**
The Debtors.Name field is now 300 Characters long to accommodate the full length of the prefix, first name, middle name, last name, and suffix fields in the database.

**LIQ-3486**       **Sub Batch type was missing from the payhistory payment details dialog.**
Added subbatchtype to the batch type field, similar to how it was displayed in classic.

**LIQ-3482**       **CBR panel for Collector**
CB Reporting panel now available in collector. Functionality includes Extend, Report, Delete (account/codebtor), and view detail data for accounts being reported.

**LIQ-3468**       **When doing payment spread via Collector the Initial account balances are not correct.**
Account balances are now correct when doing payment spreads in Collector.

**LIQ-3448**       **Chrome Extension for Dialer support in Liquid Latitude**
Chrome Extension for Dialer support in Liquid Latitude: uses Chrome extension with native-messaging to load the Latitude.Utilities.DBus library.

**LIQ-3447**       **New policy to toggle interest accrual**
A policy now exists in Applications\Liquid Latitude\Account Data\Scheduled Payments\Create Scheduled Payments to toggle interest accrual. This policy setting defaults to true.

**LIQ-3441**       **Error editing Salesman**
In System Codes and Settings, Financial, Salesman, create new Salesman record, Save. Or, open existing salesman. Attempt to update/edit any fields and save, error will follow. Has been corrected.

**LIQ-3439**       **Account Warnings missing in Account toolbar**
The Account Warnings have been added back to the Account toolbar

**LIQ-3436**       **When a payment was created and it's related to a scheduled payment the createdby column on the payhistory record is set the the user that is processing the payment.**
When a payment is created and it's related to a scheduled payment the createdby column on the payhistory record is set the the user that is entered the scheduled payment.

**LIQ-3432**       **The documentation ID associated with the attached document now shows in Events panel.**

The documentation ID field was not getting populated in the documentation event object.

**LIQ-3405**    **Quick Search functionality added**

Quick search now has a dropdown that allows the user to select the type of search they want to perform, and in the case of phone numbers, will be guided with template including a country selector. Shorthand is also supported, the user can type the letter(s) shown in brackets in the dropdown and hit the tab key and it will automatically switch the search to that format.

**LIQ-3343**    **Added sort direction indicator to three Reference panels.**

Added a sort direction indicator to the Payment History, Interactions, and Events panels. When you click a column heading, the system displays an arrow next to the column heading that indicates the sort direction.

**LIQ-3331**    **Documentation panel didn't allow column sorting and pagination.**

Documentation panel now allows column sorting and pagination.

**LIQ-3320**    **Pressing "save" button multiple times does not create new event entries until data is actually changed.**

Now pressing the "save" button multiple times does not create new event entries until data is actually changed.

**LIQ-3307**    **Address Status button text will show 'No Address' when no address fields are populated.**

When no address fields are populated in the customer task panel the address status button will disable and display 'No Address'

**LIQ-3158**    **When an approval is done on a settlement (not PFF), there are multiple events added for the approval**

Only one event shows in the event and interactions

**LIQ-3150**    **The entered date in payhistory was using UTC date to and then the Date from that value. This could result in the entered date being day back.**

The entered date will now use the current date from the server for payhistory.

**LIQ-2911**    **Added Complaints panel.**

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

**LIQ-2899**    **Previously phone numbers whose length exceeded 10 digits were truncated beyond the tenth string, and those characters were moved into the extension field. This has been changed to accomodate for international phone numbers (which can exceed ten characters with the international country code).**

**LIQ-2460**    **Debtor name display was not uniform across the collector workform**

The display of debtor names is now uniform across the workform.

**LIQ-2426**    **remove obsolete Latitude.Web.DirectDebit component**

All the functionality which was originally in the Latitude.Web.DirectDebit component was sucked out and put in other components long ago, the Latitude.Web.DirectDebit component was left in place for architectural reasons. Since those reasons have lapsed, it is now to be removed.

Should a new installation be enplaced on top of an older one, and the original Latitude.Web.DirectDebit DLL be left in place, there should be no problems.

**LIQ-2419**    **When an authorized third party is removed from an account, communication with that party ceases.**

Letters cannot be sent.
Phone numbers can not be called.
And related data such as addresses phone numbers and email addresses will not be displayed in the workform.
And authorization/responsibility cannot be removed if there is an active arrangement for that debtor.

**LIQ-2308**    **sensitive data was showing up in the log file**

sensitive data will be omitted from the log, even if the trace level is turned up to or past ultraverbose

**LIQ-446**     **Reminders now respect desk settings**

In administration the user can configure Max Reminder Days. When this is configured, reminders can only be set to be due up to today + MaxReminderDays. If the date selected is past that, save is disabled and a message is displayed alerting the user.

### Component: Liquid Portal

**LIQ-4365**     **extra data panel does not show, reports error**

A stability issue was present which caused arbitrary errors in unrelated components, was fixed globally in LIQ-4013 concurrently.

**LIQ-4098**     **Events will now display in correct order**

Events will now display in correct order

**LIQ-4096**     **Fixed the height of the phones reference panel to allow the edit dropdown to be visible.**

Added a height attribute to the phones panel.

**LIQ-4035**     **Duplicate emails were sometimes showing up in the Email panel when adding a new email or updating an existing email.**

This fix addresses the above issue, which was only reproducible for accounts that had debtors that were associated with other accounts/debtors via their DebtorAssociationId.

**LIQ-3842**     **This fix corrects the Collector Queue business logic.**

Included fixes for the Collector Queue are: not queuing accounts whose queue date is in the future, prompting the user for a follow up date if they have permission, using the desks's followup date settings if the user does not have permission to set a follow up date, updating the queue level appropriately when arrangements are created/updated/deleted and updating the queue level appropriately when payment are process successfully or if they're declined.

**LIQ-3488**     **Address Reference Panel - Fixes the State and County Columns**

Address Reference Panel - Fixes the State and County Columns (they were reversed)

### Changes in 3.0 SU 3

SCR     Description/Details

### Component: Infrastructure

**LIQ-3226**     **The sproc used by exchange to add servicehistory records was not setting the requestedDate value. This caused an issue with letter requests.**

139
The requestedDate value is being set to the current datetime.

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

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

**LIQ-2660**     **Interest is not being calculated consistently.**

The spInterest_Update proc was modified so that current0 is the sum of current1-current10 (not including the cost bucket if collection cost is turned on. The Interest_GetInitialAccountState was adjusted to handle the master.interest rate if it was entered as 10.0 or .10 with both representing an interest rate of 10%. Also the Collector work form has been adjusted such that the interest routine is called before the account pop.

## Component: Liquid Center

**LIQ-3441**     **Error editing Salesman**

In System Codes and Settings, Financial, Salesman, create new Salesman record, Save. Or, open existing salesman. Attempt to update/edit any fields and save, error will follow. Has been corrected.

**LIQ-3439**     **Account Warnings missing in Account toolbar**

The Account Warnings have been added back to the Account toolbar

**LIQ-3436**     **When a payment was created and it's related to a scheduled payment the createdby column on the payhistory record is set the the user that is processing the payment.**

When a payment is created and it's related to a scheduled payment the createdby column on the payhistory record is set the the user that is entered the scheduled payment.

**LIQ-3343**     **Added sort direction indicator to three Reference panels.**

Added a sort direction indicator to the Payment History, Interactions, and Events panels. When you click a column heading, the system displays an arrow next to the column heading that indicates the sort direction.

**LIQ-3215**     **Modify the old Take Payments handler to accomodate existing Direct Debit payments that are type Custom so adhoc payments can be added to a debtor.**

247

**LIQ-3158**     **When an approval is done on a settlement (not PFF), there are multiple events added for the approval**

Only one event shows in the event and interactions

**LIQ-3156**     **Fixed EventsInsert Trigger to ignore empty elements.**

Empty AccountId Elements were causing the EventsInsert to violate the fk on master.number

**LIQ-3150**     **The entered date in payhistory was using UTC date to and then the Date from that value. This could result in the entered date being day back.**

The entered date will now use the current date from the server for payhistory.

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

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

**LIQ-3114**     **This fixes the issue where the batch processor does not complete because of a failure to post in one payment**

case#172
case#236
case#237

**LIQ-3087**     **Added functionality to allow for a Container with Multiple AccountIds**

Added functionality to allow for a Container with Multiple AccountIds.

**LIQ-3084**     **Amount field on arrangements panel not displaying the correct field from totalpaid records.**

Arrangements panel now displaying amount in totalpaid as opposed to paid buckets.

**LIQ-3072**     **processing CC payments which are part of very large arrangements which decline takes a very very long time, because all remaining payments must be placed on-hold**

change the way multiple payments are placed on hold to enhance efficiency

**LIQ-3071**     **Disables amount and date when editing an arrangement**
Disables amount and date when editing an arrangement.

**LIQ-3064**     **Arrangements - Bypass Business Rules**
130
Currently unchecked "Bypass Business Rules" in Scheduled Payments user policy will not allow editing of payments with a promise payment method. This fixes that issue.

**LIQ-3057**     **Calculations based off Settlement Percent instead of Settlement Amount causing rounding issues when SIF Amount is entered and transferred to Amount field.**
150

**LIQ-3056**     **Do not allow changing Date field for existing arrangements.**
142
Do not allow changing Date field for existing arrangements

**LIQ-3048**     **Fixed date/time of Take Payment to match Arrangements for British Summer Time**
129

**LIQ-3011**     **Added "Daily Payment Frequency" as a payment option.**
Added "Daily Payment Frequency" as a payment frequency option. Weekends and Holidays are still skipped.

**LIQ-3007**     **Arrangements can now be rescheduled.**
A rescheduled arrangement will be initialized with all the prior recipe criteria, and will replace all existing arrangements.

**LIQ-3006**     **Makes all future declines record the DeclinedDate properly.**
075

**LIQ-2970**     **Interaction Panel Paging Fix**
112

**LIQ-2964**     **Removed duplicate payment processed events from Event and Interaction panels**
104
There are two payment processed events within the system at this time which contains the same information. When using the Event and Interaction panels both are displayed, causing confusion. Fixed by filtering out the original event type.

**LIQ-2958**     **Removes Direct Debit from Take Payment if one exists for the focused account**
101
Removes Direct Debit from the Take Payment task panel if a Direct Debit exists for the focused account

**LIQ-2918**     **Letters Functionality has been improved to now allow a more dynamic export of mail merge fields**
Two significant changes have happened within the Letter ecosystem.

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

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

**LIQ-2917**     **Added Income and Expenditure panel.**
Added Income and Expenditure panel to allow users to maintain a customer's income and expenditures.

**LIQ-2914**     **Updated the DPA Validation dialog box.**
Updated the DPA Validation dialog box to allow users to verify that they are speaking to the correct customer or authorized party before discussing an account.

**LIQ-2912**     **Added Disputes panel.**
Added the Disputes panel to allow users to add, modify, and complete debt disputes for accounts.

**LIQ-2911**     **Added Complaints panel.**
Added the Complaints panel to allow users to add, modify, close, and reopen complaints for an account.

**LIQ-2892**     **extend monthly date generator to handle monthly days greater than 28**
the former inability of the monthly date generator to handle explicit requests for monthly days greater than 28 was preventing direct debit reschedules of payment plans making use of those days

**LIQ-2876**     **Arrangements can now be rescheduled.**
A rescheduled arrangement will be initialized with all the prior recipe criteria, and will replace all existing arrangements.

**LIQ-2875**     **The Web Batch Payment processor takes a very long time to process payments.**
046
Adjustments have been made to improve performance when processing scheduled payments via the Web Batch Payment Processor.

**LIQ-2871**     **Create holds for other parties on an account when sole responsibility is established.**
When a party requests and is granted sole responsibility on a joint account, the system suspends collection activity for that account for all other parties on the account.

**LIQ-2868**     **When creating a payment arrangement of type Direct Debit, which can not be immediately approved (eg: because the SIF amount is less than NPV), the arrangement is created as pending-approval. Later on a person with more authority can approve the arrangement. This fix makes sure that the newly approved payment is submitted to the Vendor (BottomLine).**
There was a problem in the Approve Arrangement pathway for Direct Debits which caused the BottomLine approve/create payment plan call to be missed.

**LIQ-2838**     **Displaying payment batch details.**
System now displays details for a completed payment batch.

**LIQ-2828**     **The setting for maximum number of scheduled payments is not being honored when setting up arrangements.**
003
The setting for maximum number of scheduled payments is now used when when setting up arrangements. Going beyond the limit will result in a server side exception.

**LIQ-2784**     **Limit number of phones that display in the Customer panel.**
If a person has multiple phone numbers, the system limits the display in the Customer panel to one phone number of each phone number type. To view all phone number for an account, use the Phones panel.

**LIQ-2764**     **Outstanding scheduled payments no longer process when a PIF or SIF arrangement on another customer's payment plan closes an account.**
If there are multiple arrangements for multiple customers and one arrangement PIFs or SIFs the account, the system doesn't process any future payments.

**LIQ-2763**     **Accounts with more than one responsible debtor (aka joint accounts) may have a single debtor request sole responsibility for the account. Sole responsibility is only granted after all other responsible debtors on the account have approved this change.**
Accounts with more than one responsible debtor (aka joint accounts) may have a single debtor request sole responsibility for the account. Sole responsibility is only granted after all other responsible debtors on the account have approved this change.

**LIQ-2761**     **Added functionality to ensure that accounts are paid in full (PIF) and settled in full (SIF) appropriately for a SIF arrangement that covers multiple accounts.**
If a SIF arrangement covers multiple accounts and there's still a balance on one or more of the accounts after

processing the payment, flag those accounts as SIF or PIF.

**LIQ-2759**   **Alter permission and add logic to support payment spread options.**

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

**LIQ-2751**   **Processing payments through AIM takes a very long time. The endpoint for transactions in collector needs to be modified to allow AIM to send transactions in batches.**

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

**LIQ-2747**   **Display the Notes panel as the default reference panel when your organization doesn't specify one.**

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

**LIQ-2731**   **When proposing an arrangement it takes a very long time when the amount of payments exceeds 10 or so. This is due to determining the appropriate fee schedule for the payment method via policies/permissions.**

The policies/permissions are now cached in dictionaries for determining the fee schedule to use for the payment method via policies/permissions. The dictionaries are lazy-loaded.

**LIQ-2728**   **When altering payment plans due to re-present change or due to overpayment change, also alter the start date to the next scheduled payment.**

When a detail on the account (or debtor) changes which will change whether or not associated direct debit payment plan arrangements should re-present, the DD payment plan must be changed to reflect. The DD payment plan 's re-present or not-re-present is controlled by an item called the Application ID. To change the App ID, the old payment plan must be deleted and a new payment plan created. The nature of this fix is that the start date for the newly payment plan must be precisely changed to match the date of the next payment.

There is a second detail to this fix, involving overpayment. When any payment is posted, all direct debits associated with the account are checked to see whether the next direct debit payment (only) will over pay the account. If this is the case, then the direct debit payment plan is altered to remove all the payments after the next payment, and the next payment amount is modified to prevent overpayment. Similarly to the App ID change issue noted above, this fix changes the the way the start date is figured so that the start date for the altered payment plan must be precisely changed to match the date of the next payment.

**LIQ-2698**   **Processing payments through Exchange takes a very long time. The endpoint for transactions in collector needs to be modified to allow Exchange to send transactions in batches.**

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

**LIQ-2677**   **Added ability to redact notes.**

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

**LIQ-2668**   **Adjustment for SellAsIsOrRepaired field due to conversion data from old Latitude 8.3 db**

Adjustment for SellAsIsOrRepaired field due to conversion data from old Latitude 8.3 db.

**LIQ-2653**   **Corrects issue where PIF-Count arrangements are sometimes one or two cents less than the current balance, and thus fail to PIF the account.**

Patch to fix situation where rounding done in the wrong place in the amount calculator was causing the payment amount to persistently be too low.

**LIQ-2621**   **Report start-up errors when the connect string is incorrect**

Issues with the connect string or with the database server would not get logged when the application (batch processor OR web client) was started. This patch fixes that.

**LIQ-2552**   **Adjusted formatting on fields where interest rate wasn't being displayed to reflect what was stored in the database. (was displaying 500% where should have displayed 5, and 5.00 is stored in database)**

Adjusted formatting on fields where interest rate displayed incorrectly

**LIQ-2511**  **Added functionality to hold remaining payments in Batch Processor when a credit card or ACH payment is declined during batch operations.**
When a payment is declined during payment batch processing, the payment now shows as "on hold" in the Work Form.

**LIQ-2485**  **If you realtime process a payment, and that payment is declined (for CC/ACH), then all remaining payments in that same arrangement will automatically be placed on hold.**
14081

**LIQ-2460**  **Debtor name display was not uniform across the collector workform**
The display of debtor names is now uniform across the workform.

**LIQ-2419**  **When an authorized third party is removed from an account, communication with that party ceases.**
Letters cannot be sent.
Phone numbers can not be called.
And related data such as addresses phone numbers and email addresses will not be displayed in the workform.
And authorization/responsibility cannot be removed if there is an active arrangement for that debtor.

**LIQ-2382**  **Enhance Events panel to include notes.**
Added notes to Events panel.

**LIQ-2308**  **sensitive data was showing up in the log file**
sensitive data will be omitted from the log, even if the trace level is turned up to or past ultraverbose

**LIQ-2295**  **Arrangements aren't showing in Interactions panel under certain conditions.**
Individual payment create/delete events for "arrangement-wide" operations no longer show in Interactions panel. For example, if you delete all payments in an arrangement, a single entry appears in the Interactions panel, rather than one entry for each deletion. If you modify individual payments on a scheduled arrangement or you delete a few of the payments, an entry appears in the Interactions panel for each action.

**LIQ-2044**  **Add arrangement events to Interactions and Events panels.**
Added the following events to the Interactions and Events panels:

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

## Component: Liquid Portal

**LIQ-2891**  **Added size constraint on letter images.**
Images embedded in a letter template cannot exceed the size limit of 100 KB.

**LIQ-2890**  **Converting server generated timestamps to use Utc**
SU02 includes changes to normalize all timestamp fields to Utc. Updates were further needed to server generated timestamp fields to ensure they are persisted into the database as Utc.

**LIQ-2873**  **Currently the configuration for batching for financial transactions was contained in the config file**
The configuration for batching for financial transactions is now configured at the individual agency level.

**LIQ-2863**  **In AIM Receiver the processing of financial transactions can take a long time.**
The processing of financial transactions in AIM Receiver can now be batched. This helps with performance.

**LIQ-2695**   **Replaced branding logos.**

Replaced branding logos with the new Interactive Intelligence logos.

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

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

**LIQ-2461**   **You can now do adhoc payments after setting up a direct debit**

You can now schedule payments on an account that currently has a direct debit arrangement on it.

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

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

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

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

## Changes in 3.0 SU 2

**SCR**       **Description/Details**

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### Component: Infrastructure

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

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

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### Component: Liquid Center

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

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

**LIQ-2485**   **If you realtime process a payment, and that payment is declined (for CC/ACH), then all remaining payments in that same arrangement will automatically be placed on hold.**

14081

**LIQ-2476**   **Data not being formatted correctly.**

Data not being formatted correctly

**LIQ-2382**   **Enhance Events panel to include notes.**

Added notes to Events panel.

**LIQ-2295**   **Arrangements aren't showing in Interactions panel under certain conditions.**

Individual payment create/delete events for "arrangement-wide" operations no longer show in Interactions panel. For example, if you delete all payments in an arrangement, a single entry appears in the Interactions panel, rather than one entry for each deletion. If you modify individual payments on a scheduled arrangement or you delete a few of the payments, an entry appears in the Interactions panel for each action.

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

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

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

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

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

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

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

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

**LIQ-2181**      **Monthly payments are skipping a month on non-Direct Debit payment methods when the start date is later than the selected monthly date.**

Monthly and weekly payment generators now take an additional argument indicating whether dates should be forward, backwards, or advisory.
Forward is sequence Oct 18, Dec 2, Jan 2 …
Backward is sequence Oct 18, Nov 2, Dec 2 …
Advisory is sequence Nov 2, Dec 2, Jan 2 …
Direct Debit always uses Advisory, because the start date is required to match the frequency
Other Arrangements that formerly used "Forward" now use "Backward" instead.
If, for example, the frequency is "Monthly - 15th day" and the start date is May 14th, the first payment date will be May 14th, and the second payment date will be May 15th. Use caution when selecting a start date as you can now set 2 payments due in the same month, depending on your selections.
This issue only applies to monthly, bimonthly, weekly, bimonthly (fortnightly), and every 28 days. Monthly pick is unaffected because the frequency is enforced and twice-a-month is unaffected since only start and second dates are inputs.

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

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

**LIQ-2159**      **Don't allow a user to propose a payment greater than settlement amount.**

If a user attempts to create a payment arrangement that is greater than the settlement amount, the system grays out the Propose button.

**LIQ-2158**      **Don't allow users to propose an arrangement when a scheduled payment already exists.**

11393
If a user attempts to propose a settlement and there is an existing scheduled payment arrangement, the system grays out the Propose button.

**LIQ-2157**      **Don't allow users to change the payment method for a proposed arrangement until saving the proposed arrangement.**

When proposing an arrangement, users cannot change the payment method until saving the proposed arrangement. To propose an arrangement with a different payment method, save the proposal and the propose another arrangement.

**LIQ-2134**      **CBR Requester program won't order reports.**

Added appropriate permissions to Interaction Collector so that CBR Requester program can order various credit bureau reports.

**LIQ-2124**      **Support search for phone number when the Dialer triggers an account pop.**

If the Dialer only passes a phone number and not the account ID, the system searches for the phone number in Interaction Collector. If a single account matches the phone number, the system displays the account in the Work Form. If more than one account matches the phone number, the system displays the matching accounts on the Results tab in the Search Accounts panel.

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

Added system configuration functionality to Interaction Collector.

**LIQ-2109**     **Because of the differing scopes allowed, need separate permissions for requiring data protection validation and specifying the verification instructions.**

Moved the policy part of the Require Data Protection Validation permission to a new Configure Data Protection Validation Instructions permission. The scopes allowed for the Require Data Protection Validation permission are system, role and user. The scopes allowed for the Configure Data Protection Validation Instructions permission are system, business class, client group, and client.

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

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

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

Added the following events to the Interactions and Events panels:

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

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

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

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

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

System now saves the SIF % for future arrangements history.

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

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

**LIQ-2009**     **Capquest Interest panel does not account for payments and adjustments**

11362
11363
Issue is corrected.

**LIQ-2005**     **Extra logging for interactions with Bottom Line Direct Debit**

trace header for PayCentre fields to be sent for creation of debtor and paymentplan objects
PayCentre.PaymentPlan =>
PayCentre.Debtor =>

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

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

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

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

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

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

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

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

Re-Presentment button displays the re-presentment rules.

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

**LIQ-1910**	**TC_415_005**
**Direct Debit option is not available as a payment method when creating arrangements.**
10906
Add Direct Debit to the Accepted Payment Type list box In the Create Scheduled Payments permission. If it's selected, the system includes it in the Method list box on the Arrangements panel. If it's not selected, the system doesn't include it in the Methods list box.

**LIQ-1894**	**International phone numbers aren't formatted properly.**
The system attempts to parse phone numbers into the same country code as the current locale. If they match, it uses the national format. If they do not match, it uses the international format. If there was an error while parsing, it displays whatever is in the database.

**LIQ-1814**	**Modify SIF arrangements functionality.**
Determine the settlement value for each account in the arrangement.
If the user selects the Is Settlement check box, the system hides the Total and Negotiated boxes and displays the Minimum SIF % and Minimum SIF Amount boxes. The user can specify a percent or an amount, and the system adjusts the other box accordingly.

**LIQ-1812**	**Salesman system code is missing County and Country.**
Added County and Country to Salesman system code in the Administration tool.

**LIQ-1800**	**Need ability to set an arrangement for every four weeks.**
Added "Four Weekly" to the Frequency list box in the Arrangements panel.

**LIQ-1791**	**Need ability to process and post a payment immediately.**
Clicking Process in the Scheduled Payments card in the Arrangements panel for a payment that is due today bypasses the PVG Batch Processor and posts the payment directly to the account.

**LIQ-1788**	**Need a visual indicator of the progress and result when attempting to save information.**
The system now uses color backgrounds to indicate to the user whether an operation is pending, completed successfully, or completed unsuccessfully. The color indicators are:

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

**LIQ-1742**	**Need ability to generate and assign API keys to users to allow them to use the Interaction Collector Web Service without obtaining a token (user name and password) the normal way.**
Added API Key Manager to the Administration tool. The API Key Manager panel displays the keys used to access the API remotely. You generate a key and assign it to a user. When logging on using an API key, the system logs all activity under the user name to whom you assigned the key is assigned. You can also revoke assigned keys.

**LIQ-1724**	**Need ability to create Anchor cards and associate them to Anchors.**
Added the ability to create Anchor cards using the Administration tool. Also added the ability to specify the Anchors on which you want the Anchor cards to display.

**LIQ-1716**	**Don't list expired credit cards in a customer's wallet.**
If a credit card is expired, the system doesn't display it in the customer's wallet.

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

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

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

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

**LIQ-1681** **Rebrand DBUpdate from Latitude to Interaction Collector.**

DBUpdate now uses Interaction Collector terminology.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Added Culture Code to the Client dialog box.

**LIQ-1612** **Direct Debit should only allow one arrangement per person.**

12192
System now only allows one Direct Debit payment method per person.

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

Added the following behaviors to the PF&F button:
If there are no SIF arrangements on the account, the button is available.
If there is a SIF arrangement on the account, the button is grayed out.
If there isn't an arrangement on the account, the button is grayed out.
If the button is available, the user can click it to display a dialog box.
If there isn't a current PF&F offer on the accounts selected, the system displays the sum of NPV values for all accounts selected and allows the user to specify a "Pay this much By Date".
If there is a current in play PF&F offer, the system displays this information and doesn't provide the user with any options.
When enough money posts to the accounts in play to satisfy the PF&F, the system settles (SIF) the accounts.
If the due date arrives and not enough money was posted to the accounts to satisfy the PF&F, the system does nothing.

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

Added the following behaviors to the PF&F button:

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

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

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

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

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

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

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

**LIQ-1565**    **Total amount in Arrangements panel does not observe already scheduled payments on the account.**

The total amount in the Arrangements panel is now taking scheduled payments into consideration.

**LIQ-1564**    **Need to blend Notes and Events and display them in the Notes panel.**

So the blending logic today is: grab a page of events, then query for any notes that happened between the oldest / latest event in that page. so if i have events 1, 2, 3, 4, 5, 6 and grab pages in chunks of 3 events and there were notes which did not originate from an event in between 3 and 4's time, those would be missed from the blended view. Another edge case is when a non-event originating event happened more recently than the latest event or earlier than the earliest event.

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

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

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

Created the Income and Expenditure reference panel.

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

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

**LIQ-1451**    **Deleted items not being removed from Documentation panel..**

Deleted items not being removed from Documentation panel

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

Add ListData functionality to Liquid.

**LIQ-1401**    **Arrangements Panel**

Arrangements Panel has been added to allow arrangement entry form Liquid.

**LIQ-1373**

**LIQ-1367**    **Customers will be linked together via the new DebtorMaster relationship. A relationship identifier can be provided by the client or derived by the link evaluation.**
Account Linking functionality remains the same.

**LIQ-1298**    **Need International currency symbols.**
Added support for International currency symbols.

**LIQ-1258**    **Add support for miscellaneous holds.**
Added support for:
Accounts on Hold.
Phone Numbers on Hold.
Interest Start/Stop.
Interest Pause/Resume - Delay Interest Accrual based on the condition of an account.

**LIQ-1028**    **Debtors will be linked together via the new DebtorMaster relationship. A relationship identifier can be provided by the client or derived by the link evaluation.**
Account Linking functionality remains the same.

**LIQ-841**    **Fix search to include file number and name search enhancements**
Fixed the search results to always include the Latitude file number of the account. Also fixed name searching to require all name components to exist on the debtor record.

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**Component: Liquid Portal**

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**LIQ-2510**    **At times an error occurred when posting an adjustment using the Latitude.Core.Payments.DirectBridge.dll.**
The error that can sometimes occur when posting an adjustment has been corrected.

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

**LIQ-2325**    **Add support for Windows Authentication over the Intranet.**
Windows authentication is now supported without the use of ADFS for scenarios when the web server and user's machines are on the same domain.

**LIQ-2265**    **Need the ability to edit the payment method in a settlement.**
11256
12463
Users can now edit the payment method for a settlement.

**LIQ-2078**    **Need ability to add fee schedules.**
Fee schedule functionality is now available in the Administration tool under System Codes and Settings.

**LIQ-1740**    **Need to add codes to System Codes and Settings.**
Added the following to the Administration tool under System Codes and Settings:
Law Lists
Legal Ledger Types
Payment Sub-Batch Types
Salesman Codes
Surcharge Types

**LIQ-1737**    **Need ability to modify and delete fee schedules.**

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

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| **LIQ-1736** | **Need ability to add and modify clients in Interaction Collector. Functionality exists currently in Interaction Collector Console.** |
| | Added the ability to add and modify clients to the Administration tool under System Codes and Settings. |

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| **LIQ-1610** | **Need to support Direct Debit scheduled payments in the PVG Batch Processor.** |
| | Added the ability to choose to process Direct Debit scheduled payments in the PVG Batch Processor. These payments post to the account and aren't sent to an external vendor for processing. |

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| **LIQ-1473** | **Need to ability to view Client Guidelines.** |
| | Created the Client Guidelines panel to display the client's work plan, settlement guidelines, and miscellaneous information. |

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| **LIQ-1368** | **Integrate with error reporting service** |
| | All unhandled server errors are reported to a public-facing secured web service to allow proactive troubleshooting. |

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| **LIQ-1176** | **Need ability to specify which Task panels are available to users.** |
| | Added Task Panels permission to the Administration tool to specify the default Task panel and the available Task panels. |

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| **LIQ-1015** | **Need ability for Developers to use an API to query for process and stage transition history.** |
| | Developers can now get the process and stage transition history for a particular account, a particular person, or a particular instance of a process from the API. |

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| **LIQ-1013** | **Need the ability for Developers to use an API to cause a stage transition.** |
| | Developers can now use an API to transition an account to another stage. |

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

## Changes in 3.0 SU 1

| SCR | Description/Details |
|---|---|

### Component: Liquid Center

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|---|---|
| **LIQ-1266** | **Rebranding to Interaction Collector.** |
| | Change all needed items to reflect the Interaction Collector product line. |

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| **LIQ-958** | **Modify inventory end point to curtail number of returned accounts** |
| | Modified the inventory end point to set a hard limit of 500 accounts in the query and only returning relevant fields necessary to populate the DTOs. |

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| **LIQ-955** | **The process payment button is now protected from multiple clicks. Payment processing declines are now updating the user interface and alerting the user with declined reason properly as well.** |
| | 1) Added logic to prevent calling the web service multiple times even when the ui element is clicked multiple times before a response is recieved<br>2) Added popup in client with Vendor Reference Number and Vendor Error Message on AccountPaymentDeclined event<br>3) Removed entry for schedule payments table and refresh payment history table on AccountPaymentDeclined event |

| | |
|---|---|
| **LIQ-862** | **Double clicking the create standard note button causes duplicates** |

From the hot notes if you enter a notes then double click "create standard note", you will see 2 notes added to the notes panel.
We need to add some checks where this does not occur and only allows you to add the note once even if a person double clicks.
This is an issue in ADT's environment.

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

**LIQ-842**    **Improve performance of SQLCLR Time Zone library**
Add caching to calculation of the effective time zone rules to improve performance

**LIQ-841**    **Fix search to include file number and name search enhancements**
Fixed the search results to always include the Latitude file number of the account. Also fixed name searching to require all name components to exist on the debtor record.

**LIQ-840**    **Interactions panel updated to show all interactions**
The interactions panel would previously only display the interactions for the current account that were initiated by the currently logged on user. It has been updated to include interactions from all users.

**LIQ-837**    **Add file compression to documentation panel.**
When a file is attached with the documentation panel, the file will automatically be compressed before it is stored in the server database.

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

**LIQ-827**    **Interaction Phone Types Changed to Description**
Interactions now show phone type descriptions instead of phone types in the interaction panel.

**LIQ-815**    **Warning Notification now appears for accounts currently in legal**
Warning Notification now appears for accounts currently in legal (i.e. there is a non-null court case number)

**LIQ-791**    **Search queries timing out due to inefficient database relationship**
Attempts to search by accounts can timeout. The query performing the search defines a join between the master, Debtors, and Phones_Master tables that use non-indexed fields, resulting in suboptimal execution that can lead to a timeout of the query.

**LIQ-787**    **Search performance improved through direct database queries**
Search controller now bypasses Entity Framework and uses direct SQL queries against the database to improve search performance

**LIQ-749**    **Task panel accordion now live updates codebtor flag.**
Changing the "Is Responsible" check box on a codebtor now live updates the codebtor flag icon in the accordion.

**LIQ-743**

**LIQ-729**    **Codebtor name now live updates.**
When a codebtor name is changed, it is immediately updated in the task accordion to match.

**LIQ-728**    **Codebtor name update now updates in customer anchor card**
When a codebtor name is changed, the anchor card also updates to match.

**LIQ-714**    **When the account status is changed from an open status to a closed status the master.closed date field will be updated to the current date.**
When the account status is changed from an open status to a closed status the master.closed date field will

be updated to the current date.

**LIQ-698**      **The workform was utilizing a check on the extension field to not show when null, but the data was coming back as 0 and failing the check. This has been fixed.**

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

**LIQ-661**

**LIQ-654**      **Labels were not following proper permission/policy configurations.**
Labels now check to make sure the card is enabled before returning the permissions. If disabled or not configured it will prevent the user from viewing the anchor card.

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

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

**LIQ-587**      **Application was not taking Daylight Savings Time into consideration when calculating local time for the debtor/client.**

**LIQ-513**      **Save to Wallet Permission functionality has been corrected**
Save to Wallet Permission functionality has been corrected

**LIQ-509**      **Promise option is now gone for users without permission**
Promise option is now gone for users without permission

**LIQ-499**      **Quick note result text now auto populates**
Quick note result text now auto populates

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

**LIQ-490**

**LIQ-487**      **Interactions are remaining open indefinitely if not explicitly closed**
Build in timeout mechanism for closing the interaction after a period of inactivity

**LIQ-476**

**LIQ-475**

**LIQ-449**

**LIQ-444**

**LIQ-440**

**LIQ-435**

**LIQ-434**

**LIQ-425**

**LIQ-403**

**LIQ-402**

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

**LIQ-373**

**LIQ-367**

**LIQ-363**

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

**LIQ-355**

**LIQ-354**

**LIQ-353**

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

**LIQ-351**

**LIQ-345**

**LIQ-344**

**LIQ-336**

**LIQ-334**

**LIQ-323**

**LIQ-316**

**LIQ-315**

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

**LIQ-303**

**LIQ-302**

**LIQ-300**      **Extra Data Panel**

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

**LIQ-299**      **Misc Extra Panel**

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

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

Create a reference 'Phones' Panel.

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

Create a reference 'Notes' Panel.

**LIQ-291**

**LIQ-290**

**LIQ-289**

**LIQ-276**

**LIQ-252**

**LIQ-249**

**LIQ-246**

**LIQ-245**

**LIQ-241**

**LIQ-232**      **Added Delinquency Anchor**

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

**LIQ-231**

**LIQ-226**

**LIQ-223**

**LIQ-220**

**LIQ-218**

**LIQ-179**      **Written comments are no longer required when entering a note.**

Written comments are no longer required when entering a note. You can just put an action and a result code.

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

Create 'Contact Information' panel

**LIQ-164**

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

**LIQ-145**

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

**LIQ-143**

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

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

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

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

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

**LIQ-121**

**LIQ-81**

**LIQ-55**      **Added Documentation to the build process.**
Added Documentation to the build process.

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**Component: Liquid Install**

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**LIQ-1285**      **Fix Description field to show description data.**
Fix Description field to show description data

**LIQ-452**

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**Component: Liquid Portal**

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**LIQ-1279**      **Security - Fix to minimum password age**
If the minimum password age was set to a value and the user attempted to change their password either on the login page or within the application they would be informed that their current password was not yet old enough regardless of how old the password was or if it had been reset administratively. This is fixed so that the user can now change their password with that setting enabled.

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

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

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

**LIQ-856**      **SQLCLR Libraries added to Liquid Latitude build process**
The build process for Liquid Latitude has been updated so that the SQLCLR libraries included in the Latitude database are also compiled as a part of the same build. This change causes the Liquid Latitude build to be more self-contained and testable.

**LIQ-829**      **AIM Agency details are now displayed when account access is denied.**
AIM Agency details are now displayed when account access is denied.

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

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

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

**LIQ-805**      **Client sessions were timing out early and double tickets were being issued.**
Client sessions were timing out early and double tickets were being issued. Verified single tickets are issued now and sessions are timing out properly.

**LIQ-779**      **Change interaction timeout to be equal to the FormsAuth timeout**
Currently the timeout for an interaction is a hard-coded constant. It needs to be changed to reflect the value of the FormsAuth timeout.

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

**LIQ-733**      **Fixed credit-card validation and credit-card type determination.**

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

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

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

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

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

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

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

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

**LIQ-556**  **Charged Off Transaction History panel details view added.**
Allows the user to drill into a record and view further details on the transaction.

**LIQ-555**  **Charged Off Transaction History panel added.**
Read-only panel that can view all transactions at a high level and allow the user to drill into a record and view further details on the transaction.

**LIQ-550**  **Pre-existing labels can be added to accounts.**
When a new label is added to an account, it is then stored and available to be added to other accounts.

**LIQ-549**  **Labels are being added as functionality.**
Users can create new labels and add them to accounts.

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

**LIQ-458**

**LIQ-443**

**LIQ-406**

**LIQ-405**  **Scheduled Payment Batch Web Page**
Add functionality to enable Scheduled Payment Batch Web Page.

**LIQ-401**

**LIQ-400**

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

**LIQ-389**  **Respect Consent for Click and Dial**
If the phone number explicitly has denied consent to dial the number, do not allow Click and Dial

**LIQ-381**

**LIQ-365**

**LIQ-349**

**LIQ-333**

**LIQ-330**

**LIQ-319**

**LIQ-295**

**LIQ-286**

**LIQ-284**

**LIQ-258**

**LIQ-257**

**LIQ-240**

**LIQ-192**

**Changes in 3.0**

| SCR | Description/Details |
|-----|---------------------|

### Component: Liquid Center

| SCR | Description/Details |
|-----|---------------------|
| **LIQ-2005** | **Extra logging for interactions with Bottom Line Direct Debit**<br>trace header for PayCentre fields to be sent for creation of debtor and paymentplan objects<br>PayCentre.PaymentPlan =><br>PayCentre.Debtor => |
| **LIQ-1967** | **Added options to the Arrangements toolbar.**<br>10290 - closed<br>Added the following behaviors to the I&E button:<br>- If I&E data exists for the account, the monthly disposable income displays.<br>- If I&E data doesn't exist for the account, a dialog box opens to allow the user to add a monthly disposable income account, or bypass the process.<br><br>NPV button opens a dialog box to display the total of the NPV values.<br><br>PF&F button opens a dialog box to allow the user to specify a value greater than the NPV amount but less than the total owed.<br><br>Re-Presentment button displays the re-presentment rules. |
| **LIQ-1619** | **Enhance Fee Schedule strategy.**<br>When processing a payment for an account, the system determines Fee Schedules using the following logic-<br><br>The system determines the customer code on the account and then checks the Payment Method Fee Schedule permission.<br><br>If the system finds a match, the system uses that Fee Schedule.<br><br>If the system doesn't find a match, the system checks the account override for the Fee Schedule. If the override exists, the system uses it. If the override doesn't exist, the system uses the default fee schedule for the customer code. |
| **LIQ-1513** | |
| **LIQ-1510** | **Need to modify QEM panel.**<br>In grid, By is the Requested By value |

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

**LIQ-1508**

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

Created the Income and Expenditure reference panel.

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

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

**LIQ-490**

**LIQ-476**

**LIQ-475**

**LIQ-449**

**LIQ-444**

**LIQ-440**

**LIQ-435**

**LIQ-434**

**LIQ-425**

**LIQ-403**

**LIQ-402**

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

The user will be presented a pop up form for the placement settings

**LIQ-373**

**LIQ-367**

**LIQ-363**

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

This panel should show Delinquency bucket history and Current Balance .

**LIQ-355**

**LIQ-354**

**LIQ-353**

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

**LIQ-351**

**LIQ-345**

**LIQ-344**

**LIQ-336**

**LIQ-334**

**LIQ-323**

**LIQ-316**

**LIQ-315**

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

**LIQ-303**

**LIQ-302**

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

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

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

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

**LIQ-291**

**LIQ-290**

**LIQ-289**

**LIQ-276**

**LIQ-252**

**LIQ-249**

**LIQ-246**

**LIQ-245**

**LIQ-241**

**LIQ-232**          **Added Delinquency Anchor**
                     This will be a standard shipped anchor for our customers to use for Delinquent Accounts

**LIQ-231**

**LIQ-226**

**LIQ-223**

**LIQ-220**

**LIQ-218**

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

**LIQ-164**

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

**LIQ-145**

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

**LIQ-143**

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

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

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

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

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

**LIQ-121**

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**Component: Liquid Install**

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**LIQ-452**

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**Component: Liquid Portal**

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**LIQ-458**

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**LIQ-257**

**LIQ-240**

**LIQ-192**