GENESYS™

AIM

Printable Help

Version 2022 R1

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Abstract

This document is a printable version of AIM help.

Table of Contents

AIM Printable Help

Introduction to AIM

AIM (Agency/Attorney Interface Manager) manages all data flow to your outsourcing partners, which includes collection agencies, collection attorneys, and skip tracing companies. You can use it to place accounts with outside collection agencies and attorneys, and manage account information while the agencies or attorneys hold the accounts. It's also used to recall accounts from agencies and attorneys. AIM offers comprehensive control over account placement, including tracking and maintaining the information for accounts that it distributes to outside agencies and attorneys. AIM exports account placement information and account updates to outside agencies and attorneys. AIM imports payment transactions, demographic updates, and reconciliation information from the outside agencies and attorneys who hold the accounts.
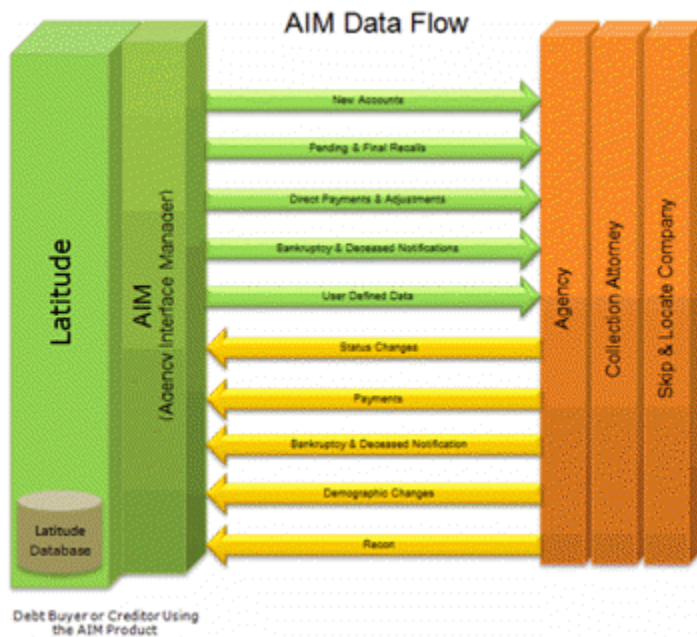
AIM also provides methods to measure performance and manage commissions, based on the following criteria:

- Number of accounts placed
- Placement (balance) totals
- Commissions assigned for each placement
- Payments received (batch tracking)

What's New in AIM

The following Service Updates (SU) introduced changes and enhancements in AIM 13.0.

2020 R1

Notes

- Added user-generated events that occurred in Latitude to the Notes export file. For more information, see Notes Export File Layout.

- Added user-generated events that you received from the agencies or attorneys holding the accounts to the Notes import file. For more information, see Notes Import File Layout.

Phone consent

- Added phone consent to the Demographics export file. For more information, see Demographics Export File Phone Panel Record.

- Added phone consent to the Demographics import file. For more information, see Demographics Import File Phone Panel Record.

2021 R1

Compliance Changes

- Added a new record type to AIM to support the agency reporting the validation notice to the account owner.
- Added new fields to AIM/AIM Receiver to support providing consent for phone and email along with the preferred contact method to and from the agency.
- Modified AIM and AIM Receiver to include itemization data for new business and maintenance.
- Modified AIM to allow passing preferred method of communication and call time preferences/restrictions in new business and maintenance
- Modified AIM Receiver to allow for loading preferred method of communication and call time preferences/restrictions.
- New AIM record types (CEML, AEML) are required to pass the preferred method of communication in addition to email address data.
- Version 10 does not support email types or multiple email addresses. However, liquid supports multiple email addresses.
- In AIM, the type code mentioned as blank and primary marked email are only passed.
- Added Itemization fields in the Demographics Export File Phone Panel Record.
- Added call consent and call preferences fields in the Placement Export File Account Record.

Log on to AIM

Use the **Latitude Logon** dialog box to log on to AIM. Your permissions determine which options and features in AIM are available to you. For more information, see *Permissions and Policies* in the *Latitude* documentation.

To log on to AIM

1. Do one of the following:

   o On your desktop, click the shortcut to AIM.

   o Click **Start** > **All Programs** > **Interactive Intelligence** > **Interaction Collector** > **Agency Interface Manager** > **Agency Interface Manager**

   The **Latitude Login** dialog box appears.
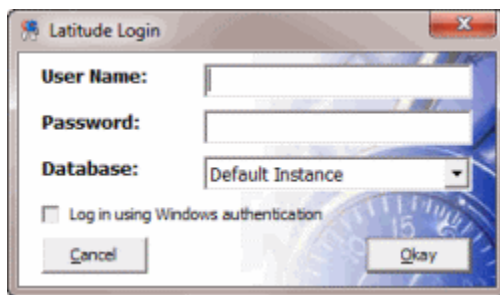
2. In the **User Name** box, type your Latitude user name.

3. In the **Password** box, type your Latitude password. As you type your password, periods display instead of the typed characters.

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

4. Click **Okay**. The **AIM** window appears.
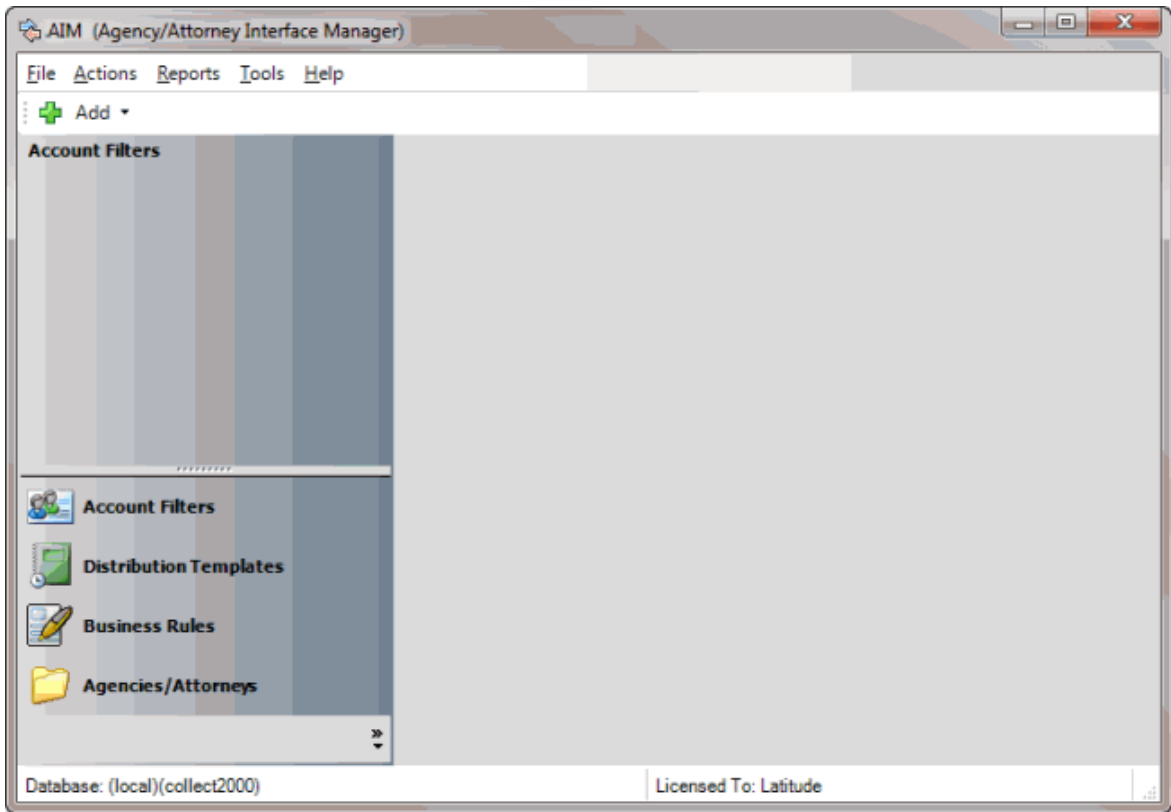
Overview of AIM Window

The **AIM** window is the main window in AIM. It allows you to manage the features of AIM, such as account filters, distribution templates, business rules, agencies, and attorneys.
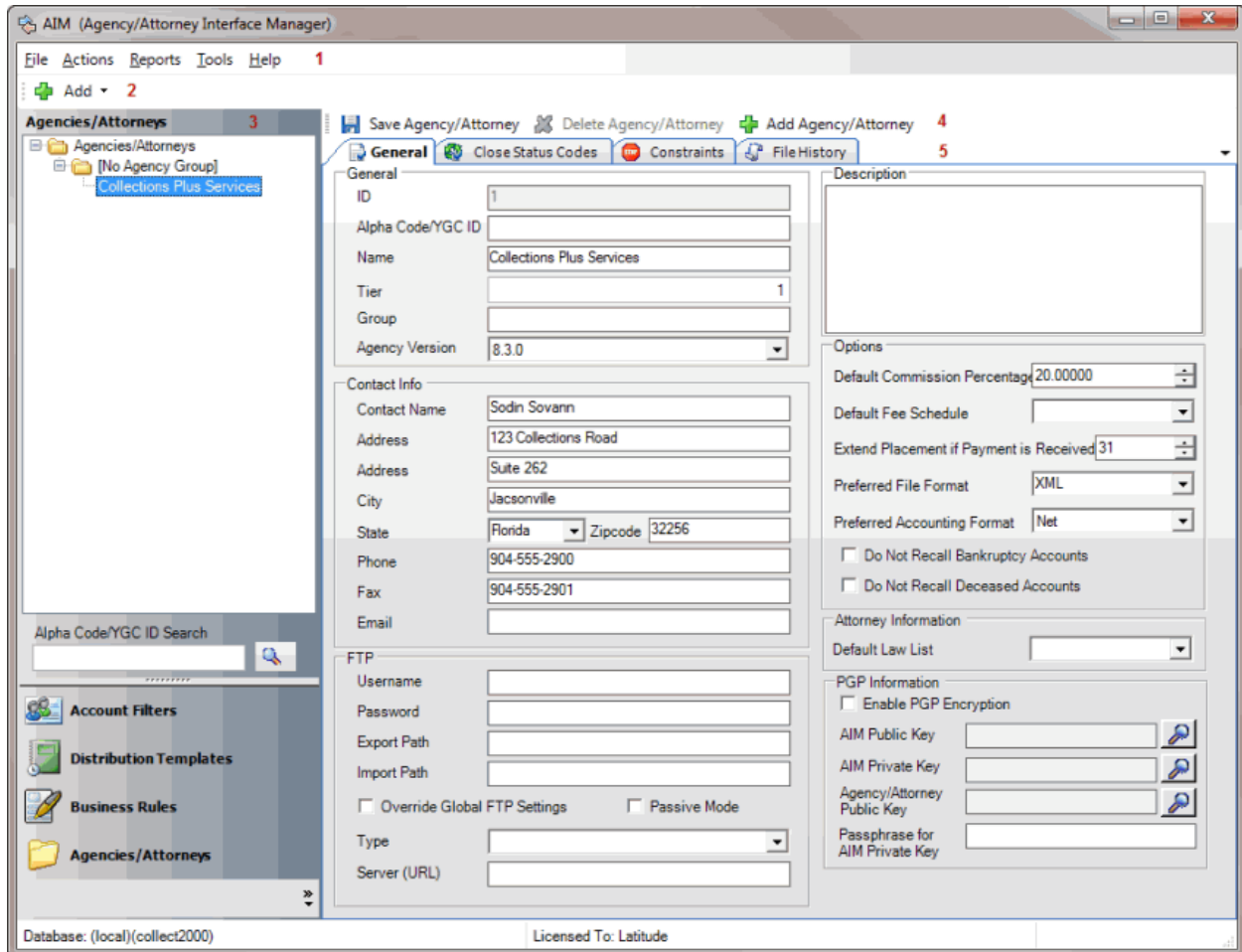
1. **Menu bar**: Displays options for the application.

2. **Submenu bar:** Allows you to add account filters, distribution templates, business rules, agencies, and attorneys.

3. **Navigation pane**: Displays the navigation for the window. To display information, click a category (for example, Account Filters), expand one or more nodes, and then click an item.

4. **Toolbar:** Displays options for maintaining information.

5. **Information pane:** When you click an item in the **Navigation** pane, the associated information appears on tabs in the **Information** pane.

AIM Features in Latitude

AIM and Latitude work together to process and track accounts that you place with and recall from outside agencies and attorneys. You can view, place, and recall accounts in both AIM and Latitude. AIM updates the affected accounts in Latitude when you receive information from agencies or attorneys and import it into AIM.

Account placements and recalls in Latitude

The **AIM** panel in Latitude allows you to:

- Create a request to place an account with an agency or attorney. AIM includes the account in the placement file the next time you generate placement files.

- View placement activity, recall activity, and payment arrangements for an account.

- Create a request to recall an account. AIM includes the account in the recall file the next time you generate recall files.

When you attempt to display a placed or recalled account in the **Work Form**, one of the following occurs:

- If you have the appropriate AIM permissions, a message appears in blue to indicate that AIM assigned the account to an agency or attorney. The account displays in the **Work Form** when you close the message.

- If you don't have the appropriate AIM permissions, a message appears in red to indicate that AIM assigned the account to an agency or attorney. The account doesn't display in the **Work Form** when you close the message.

Desk assignment

After placing or recalling accounts, you can use the **Desk Mover** tool in Latitude to assign the accounts to desks.

Account updates

Your organization, agencies, and attorneys can update account information such as demographics, bankruptcy, deceased debtor, and payment transactions. AIM exports and imports the updated information regularly to ensure that accounts are current in Latitude and in the agency's or attorney's system. Payment transaction processing requires more steps. For more information, see the "Payment processing" section of this topic.

Agency or attorney updates imported into AIM

When an agency or attorney updates information for an account that's placed with them, they export the updated information to a file. Your organization imports the updated information into AIM, and AIM updates the information in Latitude.

Your updates in Latitude

When your organization updates information in Latitude for an account that an agency or attorney holds, your organization uses AIM to export the updated information to a file. The agency or attorney imports the file into their system to update the affected account.

Payment processing

The **Payment Entry** window in Latitude allows you to process batches of payment transactions (for example, payments and reversals). The batches contain payment transactions that you imported into AIM (from an agency or attorney) or that your organization added manually in Latitude.

Agency or attorney payments imported into AIM

When you receive payment transactions from an agency or attorney that holds an account, your organization imports the payment transactions into AIM and AIM adds the payment transactions to a batch. Your organization processes the batch in Latitude, which updates the account balances for the affected accounts.

Your updates in Latitude

If your organization receives a payment transaction for an account that an agency or attorney holds, you add the payment transaction in Latitude and process it in Latitude. The next time you export payment transactions to a file, AIM includes the payment transaction in the export file. The agency or attorney imports the file into their system to update the account balances for the affected accounts. If a payment transaction is a Paid Us (PU) or Paid Client (PC) payment, AIM credits the agency or attorney that holds the account. If you recalled the account, AIM credits your organization.

Help Overview

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

To open help

In menu bar, click the **Help** option and then click **Help on AIM**. The **AIM Help** window appears.
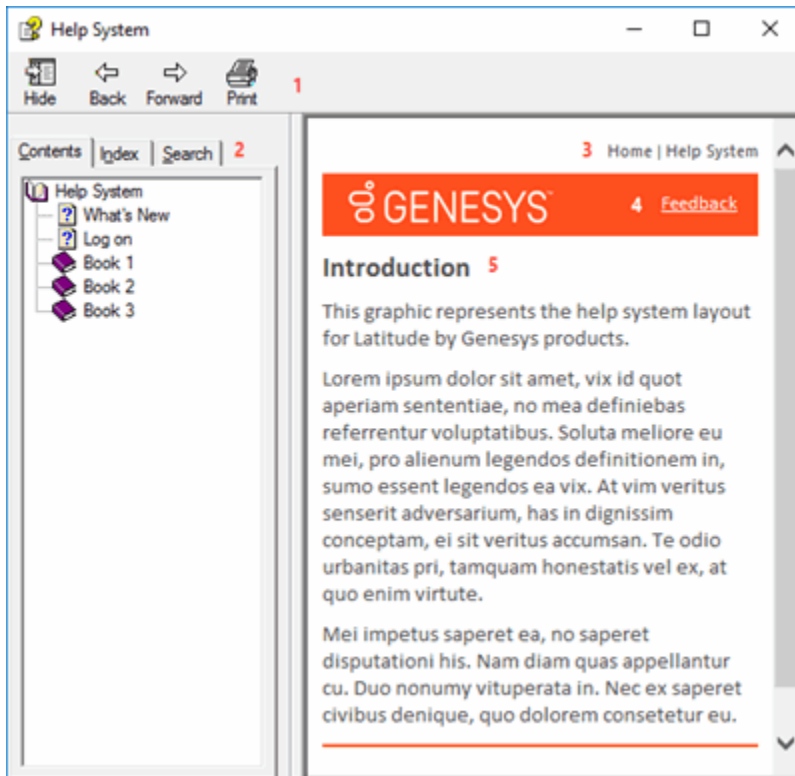
Tip: To adjust the width and height of the window or its panes, click the edge of the window or pane and drag it up or down, left or right.

1. **Toolbar:** Allows you to hide or show tabs and the **Navigation** pane, move forward and backward through topics, and print the currently displayed topic.

2. **Tabs:** Displays the following:

   Contents: Displays the table of contents. To display a topic in the **Content** pane, expand a book and then click the link.

   Index: Displays the index. To display a topic in the **Content** pane, type a keyword or phrase in the box (or scroll through the list) and then click the link in the list.

   Search: Displays the search feature. To display a topic in the **Content** pane, type a keyword or phrase in the box and then press **Enter**. In the search results, click the link.

   Glossary: If available, displays a list of terms and their definitions. To display a definition, click the term.

3. **Breadcrumbs:** Displays your current location within the help system. When you click a breadcrumb, the related topic displays.

4. **Content toolbar:** Displays an option to send feedback through an email message to Latitude by Genesys Documentation.

5. **Content pane:** Displays the contents of a topic. To view the **Content** pane menu, right-click in the **Content** pane.

Search feature

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

Search syntax

The basic rules for formulating search queries are:

*   Searches are not case-sensitive, meaning you can type uppercase or lowercase characters.

*   You cannot search for a single character or the following reserved words: an, and, as, at, be, but, by, do, for, from, have, he, in, it, not, of, on, or, she, that, the, there, they, this, to, we, which, with, you.

*   The search engine ignores punctuation marks and special characters such as @#$%^&()=+[]\.

*   Enclose phrases and terms that include a period (such as a file name with an extension) in double quotation marks.

Wildcard expressions

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

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

Topics that contain the specified phrase	"account status"	Returns all topics with account status as a phrase. For example, the search returns topics with "the account status..." but not "the status of the account..."

Boolean operators

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

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

Nested expressions

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

Account Flags and Notations

AIM flags accounts when you export information from AIM, import information into AIM, and when specific actions occur in Latitude.

Export Flags

The following table describes the flags that AIM deletes from accounts when you export information from AIM and send it to an agency or attorney.

Action	Description
You export pending recalls to a file.	If accounts included in the file have a recall objection flag, AIM deletes the objection flag. Before exporting, delete the "Account is Not Currently Objected to Recall" condition.
You create a placement file.	If accounts included in the file have a recall objection flag, AIM deletes the objection flag.

Import Flags

The following table describes the flags that AIM sets on accounts when you receive information from an agency or attorney and import it into AIM.

Action	Description
You import a recall objection from the agency or attorney.	Account has a recall objection flag. To clear the recall objection from the account, process a pending recall with the "Account is Not Currently Objected to Recall" condition deleted.
You import payment information from the agency or attorney.	If you set the account for automatic recall when you placed the account, AIM extends the pending and final recall dates the number of days specified for the agency or attorney.

Account Actions in Latitude

The following table describes the flags that AIM sets on accounts when actions occur in Latitude. For more information about these actions, see the *Latitude* documentation.

Action	Description
You generate a placement request.	AIM flags the account as ready for placement with the agency or attorney. The system includes the account when it creates the next placement file.

You generate a recall request.	AIM flags the account for recall from the agency or attorney that holds the account. The system includes the account when it creates the next recall file.
You receive a payment.	AIM flags the account for inclusion when it creates the next payment export file.
You add or modify assets.	AIM flags the account for inclusion when it creates the next asset export file.
You add or modify bankruptcy information.	AIM flags the account for inclusion when it creates the next bankruptcy export file.
You add or modify deceased information.	AIM flags the account for inclusion when it creates the next deceased export file.
You add or modify demographic information.	AIM flags the account for inclusion when it creates the next demographic export file.
You add or modify equipment information.	AIM flags the account for inclusion when it creates the next equipment export file.
You add or modify miscellaneous extra data.	AIM flags the account for inclusion when it creates the next miscellaneous extra data export file.
You add or modify notes.	AIM flags the account for inclusion when it creates the next notes export file.

Latitude Notes

The following table describes the notes that AIM creates for Latitude. AIM replaces bracket [] information with values from the corresponding AIM table.

Action	Note
Export Placements	The system placed this account with outside agency [agencyNumber, agencyName] on [date] with a balance of [current] with a pending recall date of [pend recall date].
Export Pending Recall (PEN)	The system sent a pending recall to the agency [agencyNumber, agencyName] on [date] for this account.

Export Final Recall (FIN)	A final recall has been sent to agency [agencyNumber, agencyName] on [date] for this account.
Import Recall Objection	Recall objection received from agency [agencyNumber, agencyName] with code of [obj reason] on [date]. Recall extended to [new recall date].
Import Payment	A payment in the amount of [pay amt] was received from agency [agencyNumber, agencyName] on [date].
Import Close and Return (BKP) and (DEC)	Agency [agencyNumber, agencyName] has closed and returned this account on [date] with status [close code]. **Note:** If the agency closed the account and returned it for a Chapter B7, B11, or B13 bankruptcy, the system adds the following text to the note: "Bankruptcy information has been updated." If the agency closed the account and returned it because the debtor is deceased, the system adds the following text to the note: "Deceased information has been updated."
Import Demographic Update	[address and/or phone] information has been updated from agency [agencyNumber, agencyName] on [date].
Closed Status Move Qlevel/Desk Logic (internal)	Account has been moved to [desk], [qlevel] by AIM due to a returned status of [closed status code] from agency [agencyNumber, agencyName] on [date].

System Configuration

System Configuration

Use the **Tools** menu to configure AIM for your organization. Configure the system before attempting to place, recall, or update accounts.

Global Settings

Global Settings
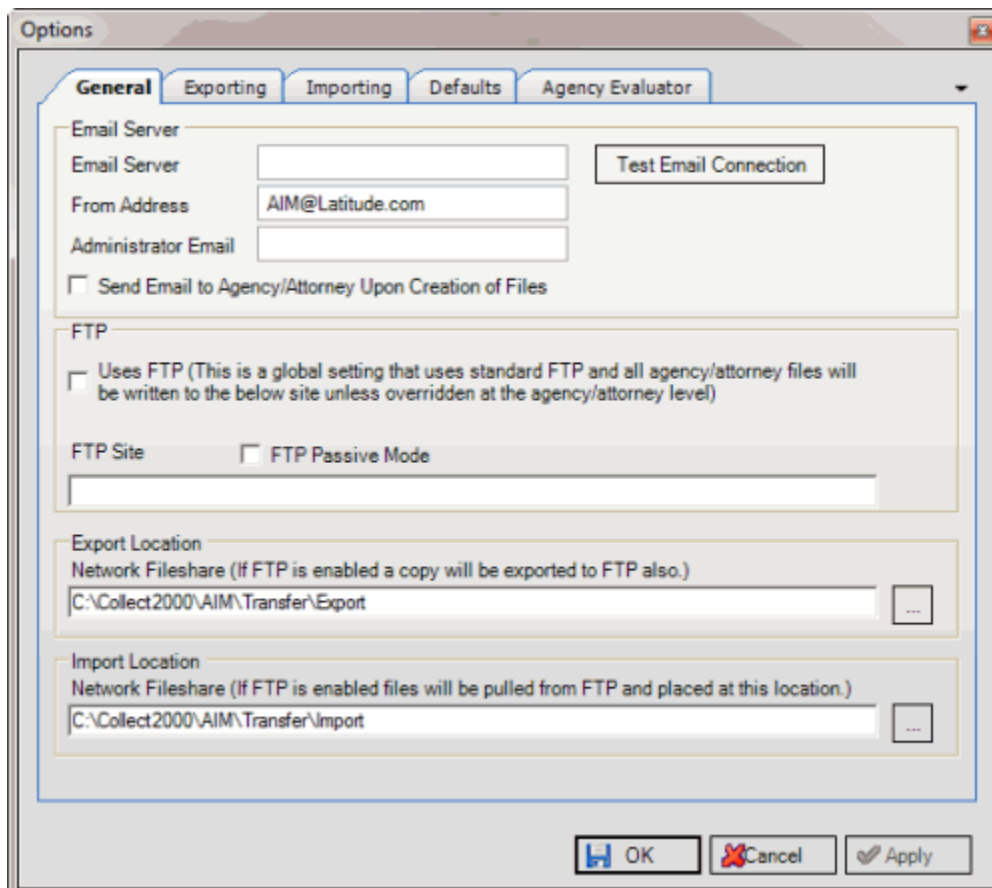
Use the **Options** window to specify settings that apply system-wide.

Specify General Global Settings

Use the **General** tab in the **Options** window to specify general global settings, such as email messaging, File Transfer Protocol (FTP), export, and import settings.

To specify general global settings

1. In the menu bar, click **Tools** and then click **Options**. The **Options** window appears with the **General** tab selected.

Email Server

Email Server: Name of the email server. For more information, contact your network administrator or Latitude by Genesys Support.

From Address: Email address to display in the **From** box when AIM sends emails to agencies and attorneys as notification that new files are ready.

Administrator Email: Internal email address to receive notification when AIM generates files.

Send Email to Agency/Attorney Upon Creation of Files: If selected, AIM sends email messages to agencies and attorneys when it generates files. To use this option, specify FTP settings and ensure that valid email addresses exist for agency and attorney contacts.

FTP

Use FTP: If selected, AIM creates files automatically on your organization's FTP site for each agency and attorney. AIM creates a subdirectory within the specified directory for each agency and attorney.

FTP Site: Path to the FTP site, excluding "ftp://" or ""ftps://." For example, "files.debtsoftware.com."

FTP Passive Mode: If selected, AIM uses passive mode for FTP providers.

Export Location

Network Fileshare: Location on the network to which to copy export files.

Import Location

Network Fileshare: Location on the network to which to copy import files.

> **Notes:**
> - An example of a shared drive is "\\BIGSERVER\AIM". An example of a physical path (non-shared) is "\\BIGSERVER\D:$\AIM".
> - The system creates subdirectories within the specified directories for each agency and attorney.
> - If you selected to use FTP, AIM copies the export and import files to the FTP site also.

2. Complete the **Email Server** section and then click **Test Email Connection**. The **Email Verification** dialog box appears.

3. In the **To** box, type the receiving email address and then click **Send Email**. AIM sends a test email to the specified email address. Verify that the person received the email message. If the person didn't receive it, modify the email settings.

4. To use FTP, complete the **FTP** section.

5. Complete the **Export Location** and **Import Location** sections and then click **OK**.

Specify Global Settings for Exporting Files

Use the **Exporting** tab in the **Options** window to specify global settings for exporting placement file data.

To specify global settings for exporting files

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1. In the menu bar, click **Tools** and then click **Options**. The **Options** window appears.

2. Click the **Exporting** tab.
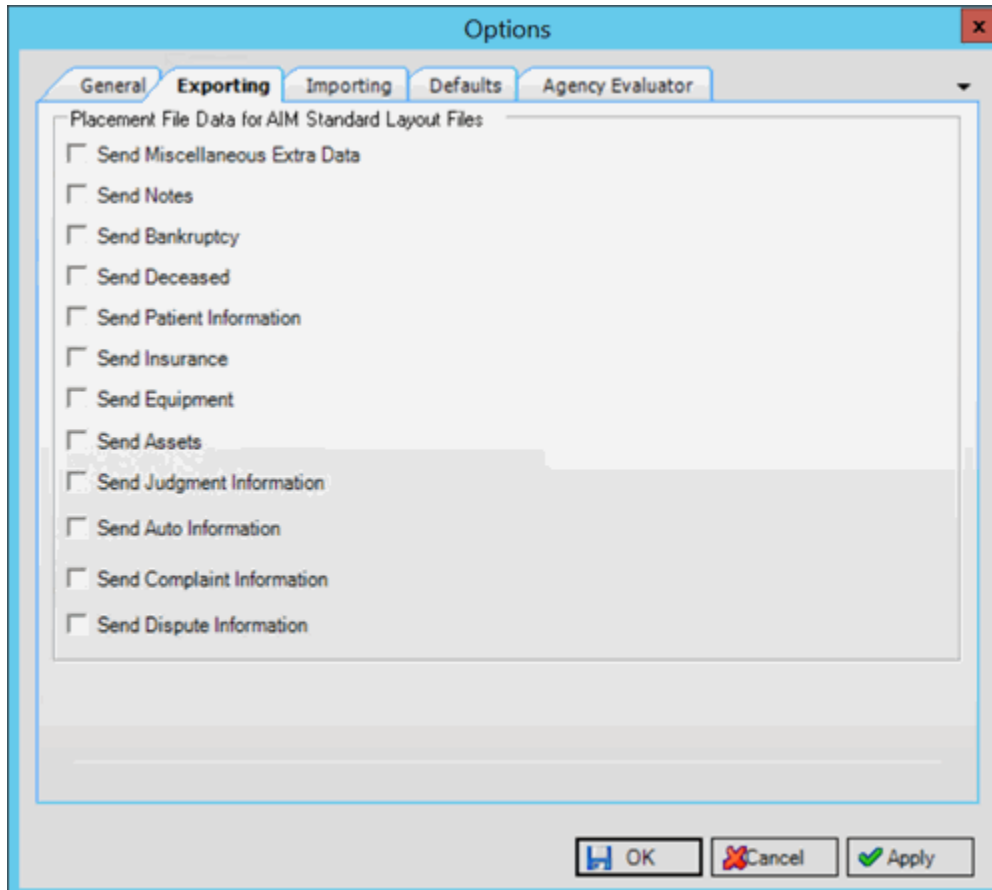
AIM includes record types for the selected check boxes in the placement file that it sends to outside agencies and attorneys. AIM excludes record types for the cleared check boxes from the placement file that it sends to outside agencies and attorneys.

3. Select and clear the check boxes as necessary and then click **OK**.

Specify Global Settings for Importing Files

Use the **Importing** tab in the **Options** window to specify global settings for importing files. These settings allow you to create rules for crediting payments toward agencies and attorneys that no longer hold an account.

To specify global settings for importing files

1. In the menu bar, click **Tools** and then click **Options**. The **Options** window appears.

2. Click the **Importing** tab.
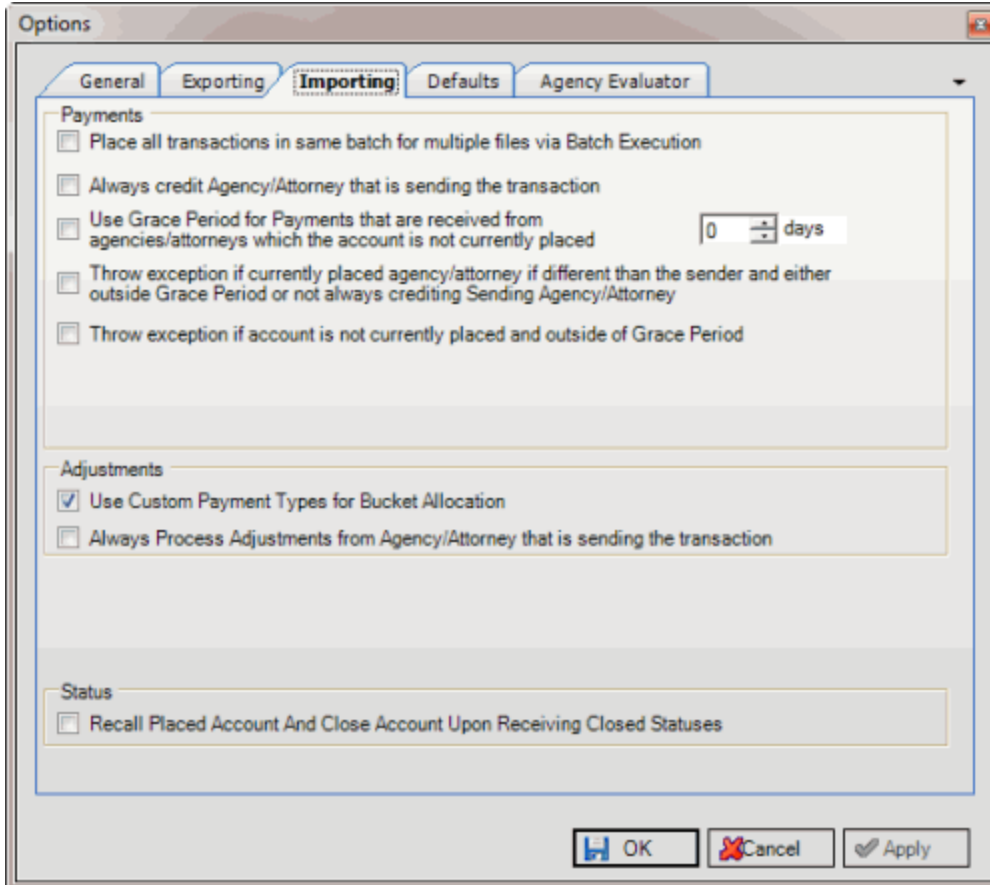
Placements

> **Place all transactions in same batch for multiple files via Batch Execution:** If selected, and multiple payment files exist within a folder, AIM places all payments into the same PA or PAR batch when you use the **Import All AIM Files from Folder** menu option.
>
> **Always credit Agency/Attorney that is sending the transaction:** If selected, regardless of who holds the account currently, AIM credits the sending agency or attorney with fees that are due for payments received.
>
> **Use Grace Period for Payments that are received from agencies/attorneys which the account is not currently placed:** If selected, AIM uses a grace period for payments that it receives from agencies and attorneys that no longer hold the accounts.
>
> **Days:** Number of days after account recall to credit agencies and attorneys for payments received on accounts they no longer hold.
>
> **Throw exception if currently placed agency/attorney is different than the sender and either outside Grace Period or not always crediting Sending Agency:** If selected, AIM generates an exception (error) when the sending agency does not match the current agency, and the specified grace period has expired. Otherwise, AIM respects the grace period. If your organization doesn't specify a grace period and the **Always credit Agency/Attorney that is sending the transaction** check box is cleared, AIM

generates an exception whenever it receives a payment from an agency that is no longer holding an account. Selecting this option allows your organization to review payment information and determine how to handle these exceptions on a case-by-case basis.

Throw exception if account is not currently placed and outside of Grace Period: If selected, AIM generates an exception when an agency or attorney doesn't hold the account currently and the specified grace period has expired. Selecting this option allows your organization to review payment information and determine how to handle these exceptions on a case-by-case basis.

Adjustments

Use Custom Payment Types for Bucket Allocation: If selected, AIM uses the buckets associated to custom payment types when importing payment reversals. If cleared, AIM uses the buckets specified in the import file.

Always Process Adjustments from Agency/Attorney that is sending the transaction: If selected, AIM processes the adjustments received from the sending agency or attorney even when the agency or attorney no longer holds the account.

Status

Recall Placed Account and Close Account Upon Receiving Closed Statuses: If selected, AIM recalls and closes accounts automatically when an agency returns a valid close status code.

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

Specify Default Global Settings

Use the **Defaults** tab in the **Options** window to specify default global settings.

To specify default global settings

1. In the menu bar, click **Tools** and then click **Options**. The **Options** window appears.

2. Click the **Defaults** tab.
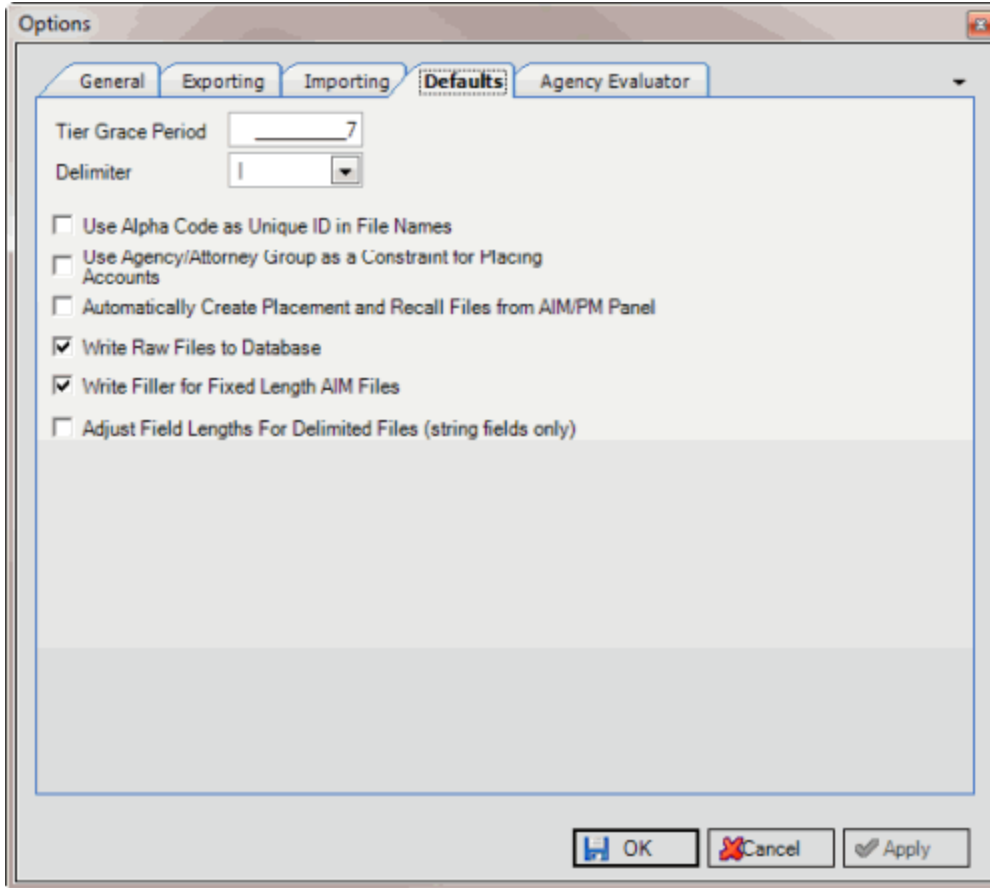
Tier Grace Period: Number of days after which AIM redistributes returned accounts. AIM uses this number to determine the last recall date for placed accounts.

Delimiter: Character to use as a separator in delimited files that AIM imports and exports.

Use Alpha Code as Unique ID in File Names: If selected, AIM includes the agency's alpha code in the file name for files that it imports and exports to agencies. AIM also includes the alpha code in the subdirectory name where it copies these files. For more information, see Specify General Global Settings.

Use Agency/Attorney Group as a Constraint for Placing Accounts: If selected, AIM distributes accounts to agency and attorney groups to prevent you from distributing accounts multiple times to the same agency or attorney. Constraints apply only when using a distribution template as part of a business rule.

Automatically Create Placement and Recall Files from the AIM/PM panel: If selected, Latitude creates a single placement file when you place or recall files in Latitude. You can also add accounts to an existing batch when creating a placement file. If cleared, you can add accounts to a new batch only.

Write Raw Files to Database: If selected, Latitude stores sent and received files in the Latitude database for later retrieval from the **File History** tab in the **Agencies/Attorneys** pane.

Write Filler for Fixed Length AIM Files: If selected, AIM pads fields with zeros or spaces (depending on the field type) in fixed-length files to meet the specified field size.

Adjust Field Lengths for Delimited Files (string fields only): If selected, AIM deletes extra spaces from string fields in delimited files to ensure that the fields don't exceed the length specified in the file layouts.

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

Specify Global Settings for Agency Evaluator

Use the **Agency Evaluator** tab in the **Options** window to specify global settings for the **Agency/Attorney Evaluator** tool. For more information, see Rebuild Agency or Attorney Evaluator Data.

To specify global settings for Agency Evaluator

1. In the menu bar, click **Tools** and then click **Options**. The **Options** window appears.

2. Click the **Agency Evaluator** tab.
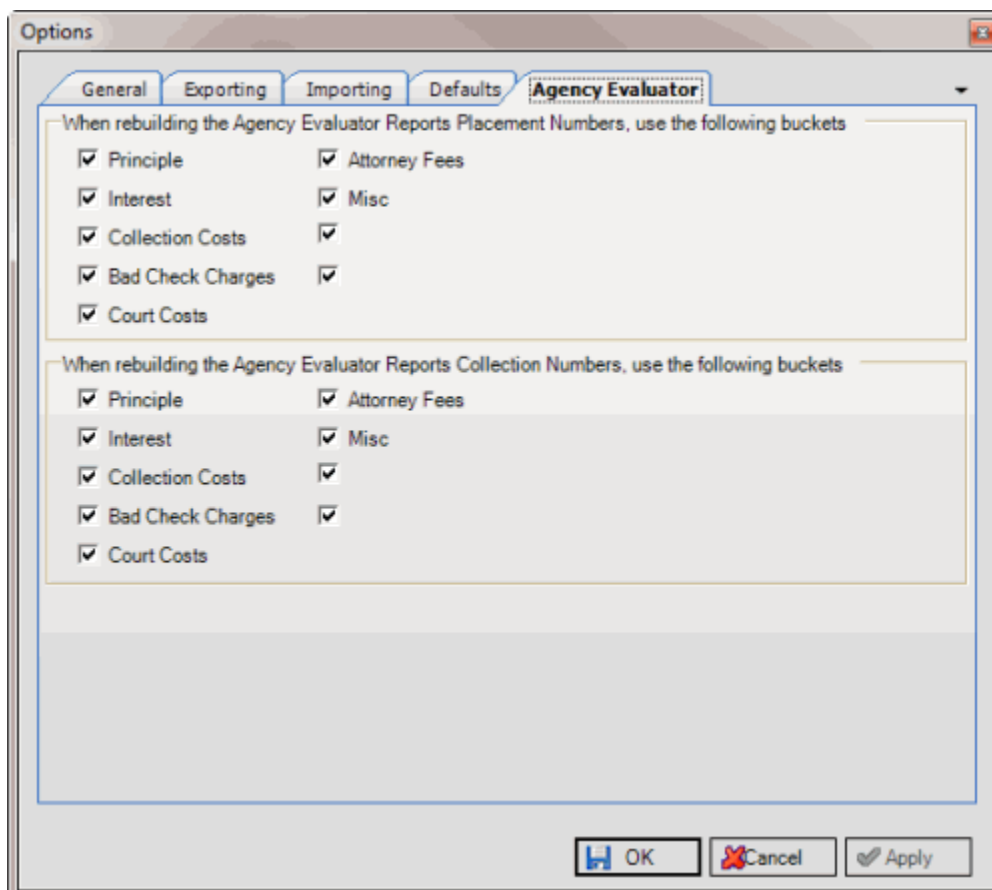
Note: Except for Principal and Interest, your organization defines the names of the money buckets in Latitude so they may not match the example. If your organization didn't define a money bucket, the check box names are blank and not used. See the last two check boxes in the example.

3. In the first section, select the money buckets to use when rebuilding placement data for Agency Evaluator reports.

4. In the second section, select the money buckets to use when rebuilding collection data for Agency Evaluator reports.

Objection Reasons

Objection Reasons

Use the **Objection Reasons** window to maintain a list of reasons from which you can select when outside agencies and attorneys object to a pending recall. If an agency sends an objection before the final recall, AIM extends the account placement the number of days specified.

Add an Objection Reason

Use the **Objection Reasons** window to add an objection reason.

To add an objection reason

1. In the menu bar, click **Tools** and then click **Objection Reasons**. The **Objection Reasons** window appears.
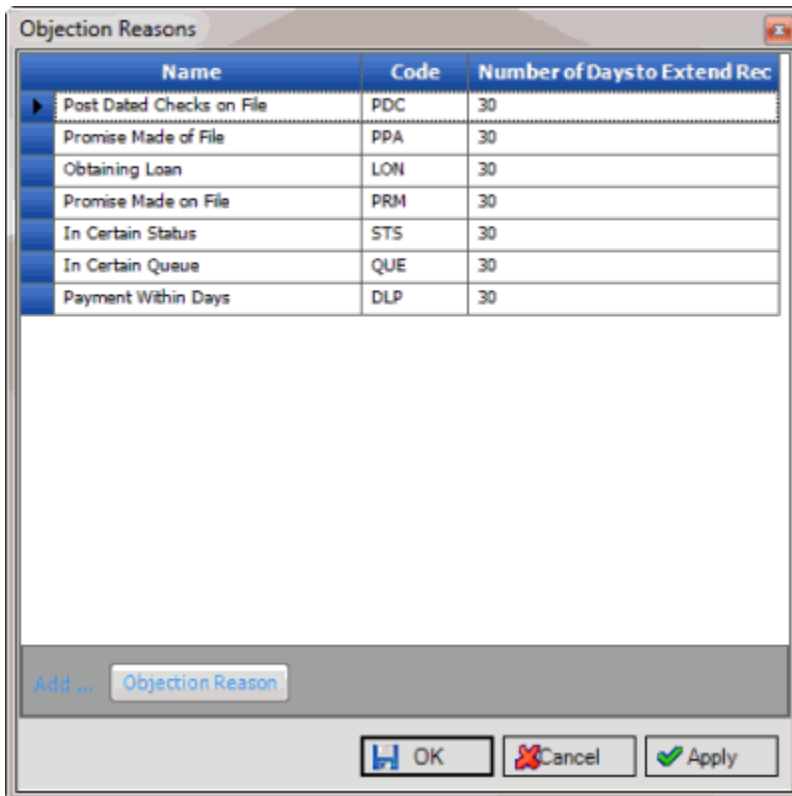
Name: Objection reason.

Code: Unique three-character code that AIM includes in the file received from the agency or attorney that triggers an extension.

Number of Days to Extend Recall: Number of days to add to the date calculated currently to generate a final recall for the account. AIM only uses this number for automatic recalls.

2. In the lower portion of the window, click **Objection Reason**. A blank row appears in the data grid.

3. Complete the information and then click **OK**. AIM adds the objection reason to the data grid and closes the window.

Delete an Objection Reason

Use the **Objection Reasons** window to delete an objection reason.

To delete an objection reason

1. In the menu bar, click **Tools** and then click **Objection Reasons**. The **Objection Reasons** window appears.
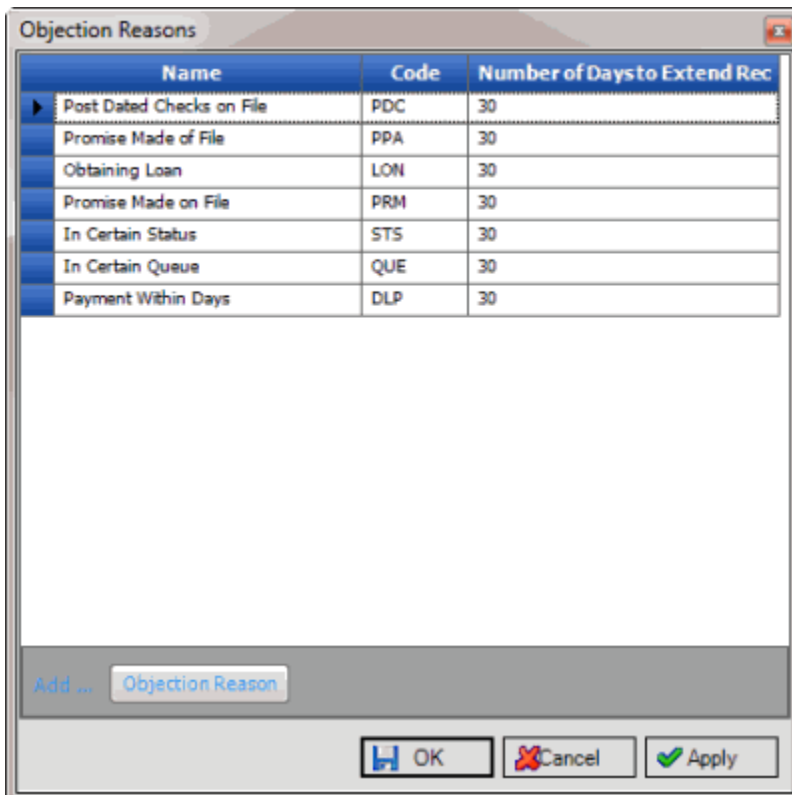
2. In the data grid, click the objection reason and then press the **Delete** key. A confirmation dialog box appears.

3. Click **Yes**. AIM deletes the objection reason and closes the window.

Recall Reason Codes

Recall Reason Codes

Use the **Recall Reason Codes** window to maintain recall reason codes that AIM sends with account recall and pending recall requests. You can also use recall reasons to 'reset' an account that AIM sent in error (for example) so it is available for the same tier placement. You assign recall reason codes to accounts

when you recall accounts manually. The system assigns the "AUT" recall reason code to accounts that it recalls automatically.

Add a Recall Reason Code

Use the **Recall Reason Code** window to add a recall reason that you can select when requesting the recall of an account from an outside agency or attorney.

To add a recall reason

1. In the menu bar, click **Tools** and then click **Recall Reason Codes**. The **Recall Reason Codes** window appears.
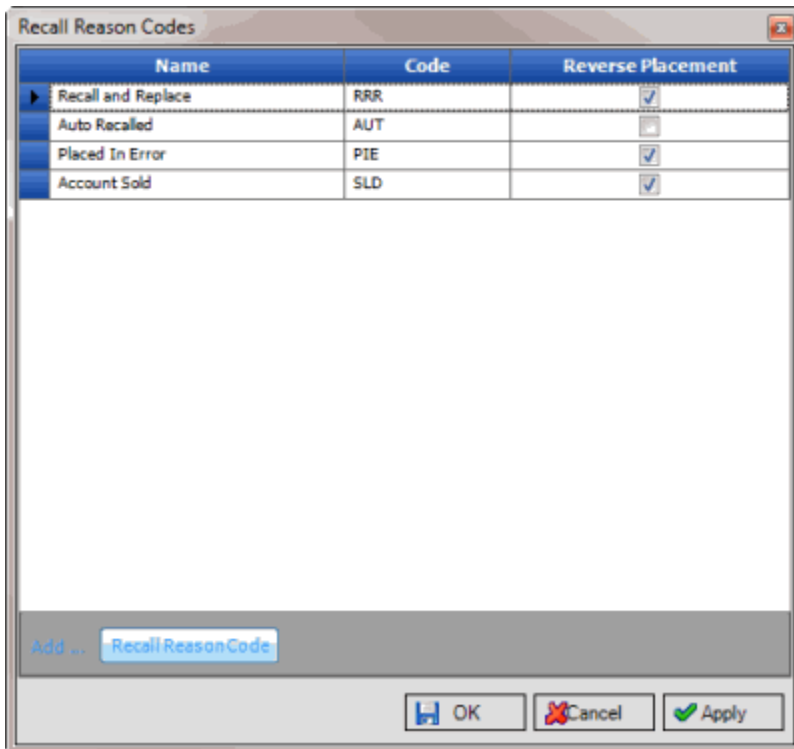
    Name: Recall reason.

    Code: Unique three-character code to include in the recall request file.

    Reverse Placement: If selected, AIM excludes placement information from reports. You can select this check box when you place an account in error, for example.

2. In the lower portion of the window, click **Recall Reason Code**. A blank row appears in the data grid.

3. Complete the information and then click **OK**. AIM adds the recall reason to the data grid and closes the window.

Delete a Recall Reason Code

Use the **Recall Reason Codes** window to delete a recall reason.

To delete a recall reason

1. In the menu bar, click **Tools** and then click **Recall Reason Codes**. The **Recall Reason Codes** window appears.
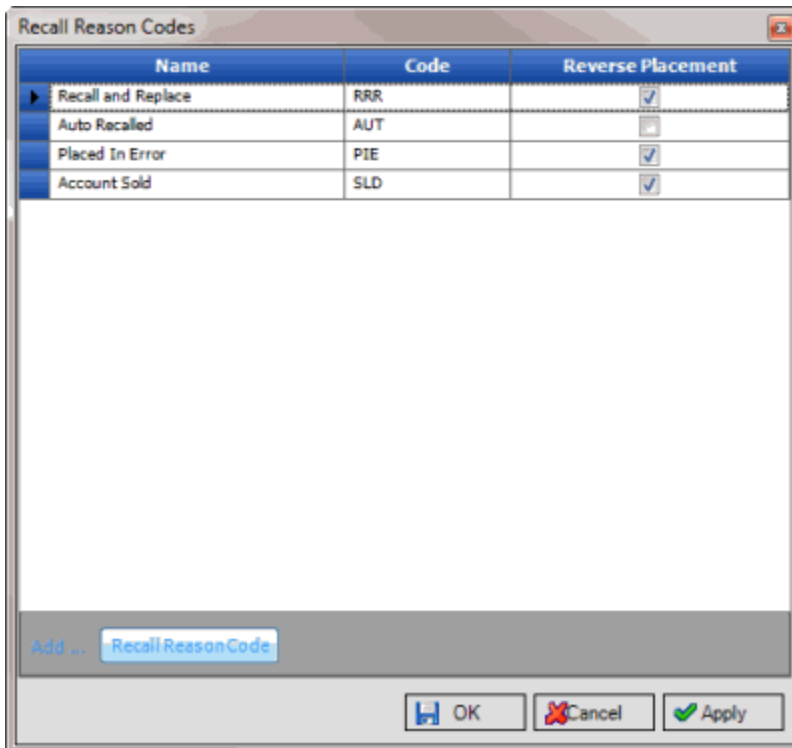
2. In the data grid, click the recall reason and then press the **Delete** key. A confirmation dialog box appears.

3. Click **Yes**. AIM deletes the recall reason and closes the window.

Custom Payment Types

Custom Payment Types

Use the **Custom Payment Types** window to maintain custom payment types that outside agencies and attorneys can use when reporting payments and reversals. You associate the custom payment type to a Latitude payment type so that AIM creates the appropriate payment batch in Latitude.

Your organization maps custom payment types to standard Latitude payment types (PA, PAR, DA, and DAR). Custom payment types mapped to a DA or DAR payment type can also contain money bucket information, allowing agencies and attorneys to create adjustments directly to one money bucket. For example, if an attorney holds an account and wants to increase costs to include filing fees, create an increasing adjustment and associate it to a specific money bucket. The increasing adjustment increases the current balance (principal).

> **Note:** AIM reserves the FO and FOR custom payment types for agencies that specify their fee in the fee amount returned in the payment file. Do not allow these custom payment types unless your organization allows agencies to submit this information.

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Grace period

You can set a system-wide grace period for payments received that you want to credit toward an agency that held the account previously. Use **Tools** > **Options** to set the grace period and how to handle payments received that do not match the holding agency. The options allow you to create an exception when the holding agency does not match. Then, your organization can review payment information and determine how to handle these occurrences on a case-by-case basis.

Net agency

If a PA payment type comes in from a net agency, AIM sets the agency fee to zero because the agency has already retained their fee. PU and PC payments credited to an agency show the account as having a fee.

Add a Custom Payment Type

Use the **Custom Payment Types** window to add a custom payment type.

To add a custom payment type

1. In the menu bar, click **Tools** and then click **Custom Payment Types**. The **Custom Payment Types** window appears.

AIM Code	Collector Code	Legal Ledger Type	Money Bucket
PA	PA	N/A	0
PAR	PAR	N/A	0
FO	PA	N/A	0
FOR	PAR	N/A	0
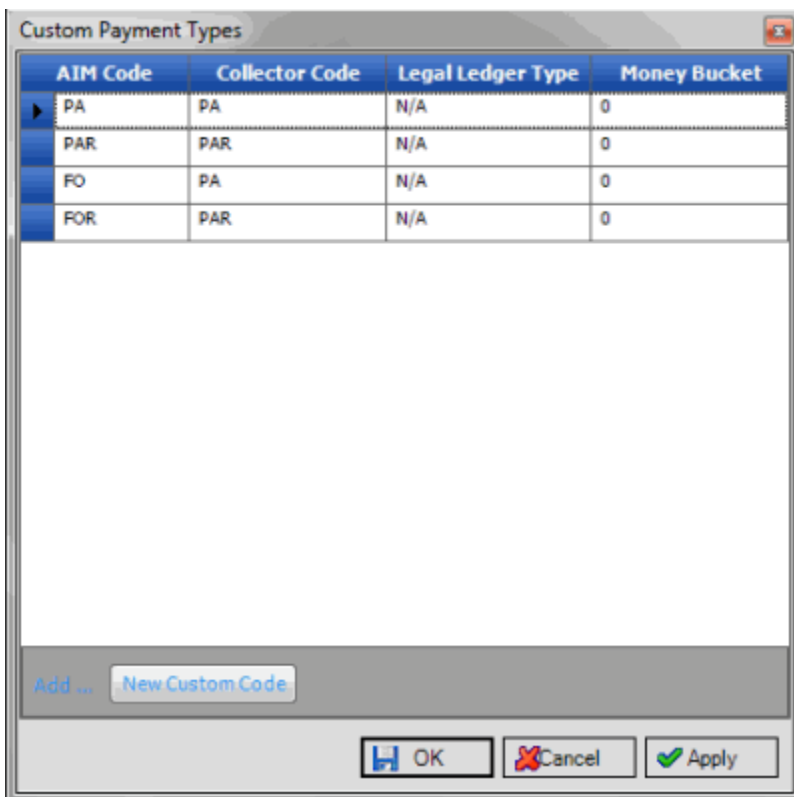
AIM Code: Unique two- or three-character code that identifies a payment type. AIM includes this code in the payment file.

Collector Code: Unique Latitude payment type code to associate to the AIM code. AIM only allows PA, PAR, DA, or DAR Latitude codes.

Legal Ledger Type: Legal ledger type to use for debits and credits for the AIM code.

Money Bucket: Latitude money bucket (1-10) to use for the payment/reversal.

2. In the lower portion of the window, click **New Custom Code**. A blank row appears in the data grid.

3. Complete the information and then click **OK**. AIM adds the custom payment type to the data grid and closes the window.

Delete a Custom Payment Type

Use the **Custom Payment Types** window to delete a custom payment type.

To delete a custom payment type

1. In the menu bar, click **Tools** and then click **Custom Payment Types**. The **Custom Payment Types** window appears.
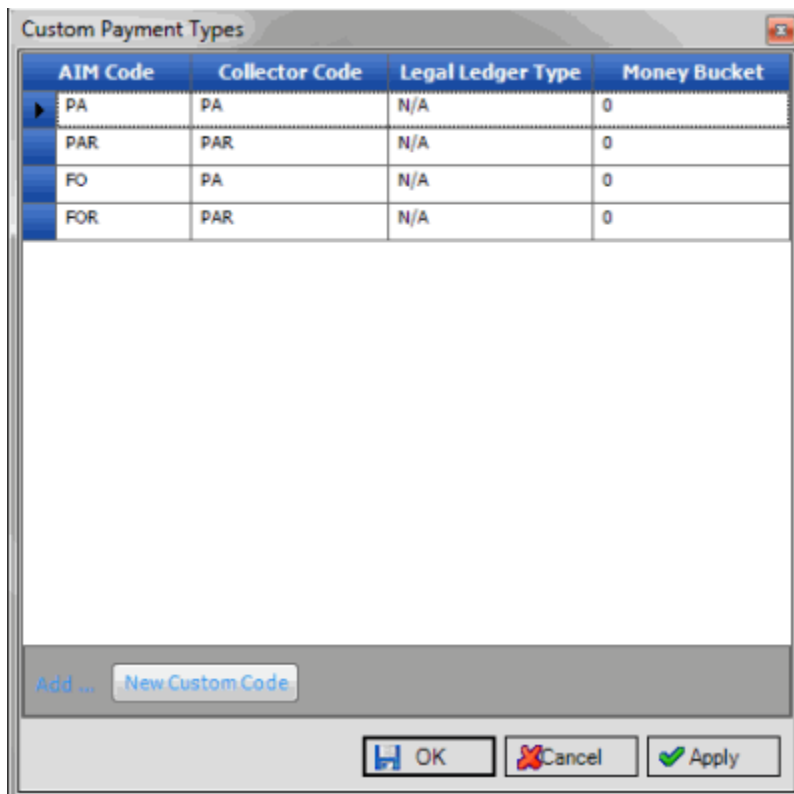
2. In the data grid, click the custom payment type and then press the **Delete** key. A confirmation dialog box appears.

3. Click **Yes**. AIM deletes the custom payment type and closes the window.

Request and Response Codes

Request and Response Codes

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Use the **Request and Response Codes** window to maintain request and response codes that AIM uses when sending account placement requests to agencies and attorneys, and receiving responses.

Add a Request Code

Use the **Request and Response Codes** window to add a request code.

To add a request code

1. In the menu bar, click **Tools** and then click **Request and Response Codes**. The **Request and Response Codes** window appears.
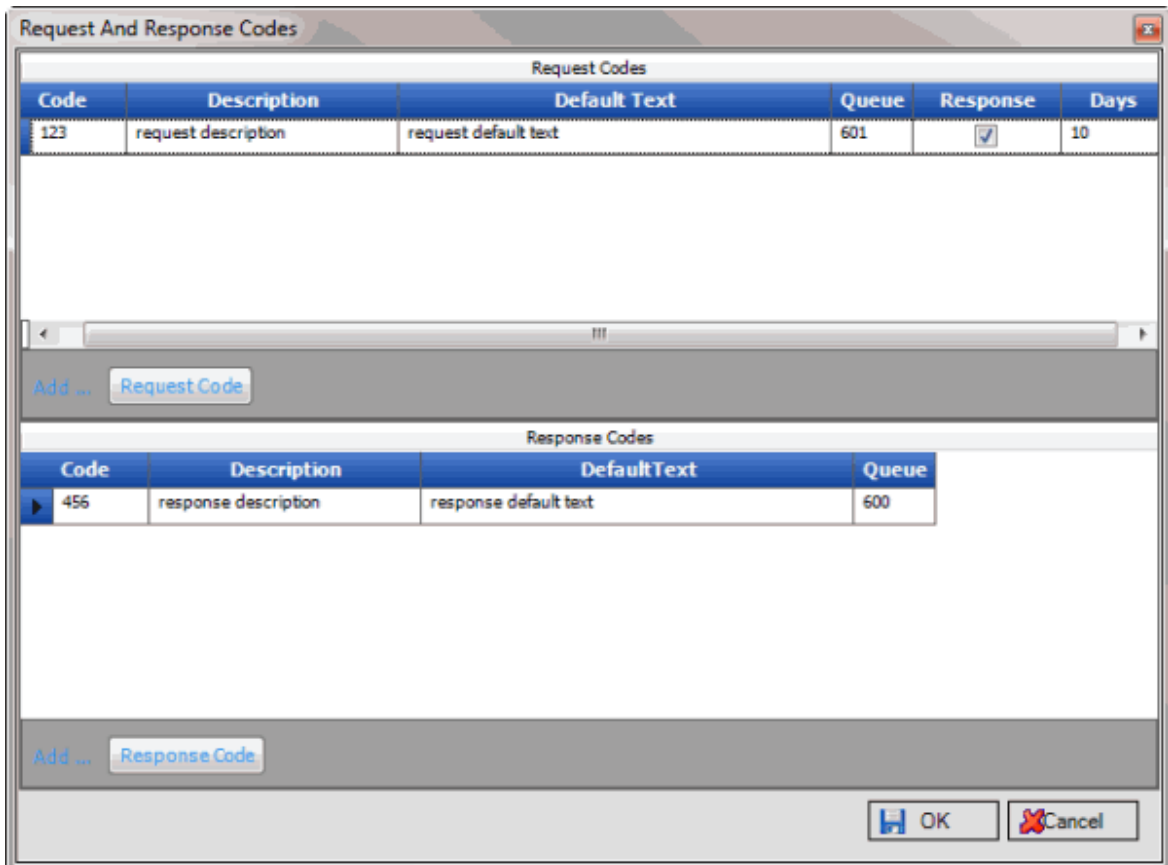
Code: Unique code that identifies the request.

Description: Description of the request.

Default Text: Default text to include in the request.

Queue: Work queue to assign to requests associated to this request code.

Response: If selected, AIM requests a response from the agency.

Days: Number of days the agency has to respond to the request.

2. In the **Request Codes** section, click **Request Code**. A blank row appears in the data grid.

3. Complete the information and then click **OK**. AIM adds the request code to the data grid and closes the window.

Delete a Request Code

Use the **Request and Response Codes** window to delete a request code.

To delete a request code

1. In the menu bar, click **Tools** and then click **Request and Response Codes**. The **Request and Response Codes** window appears.
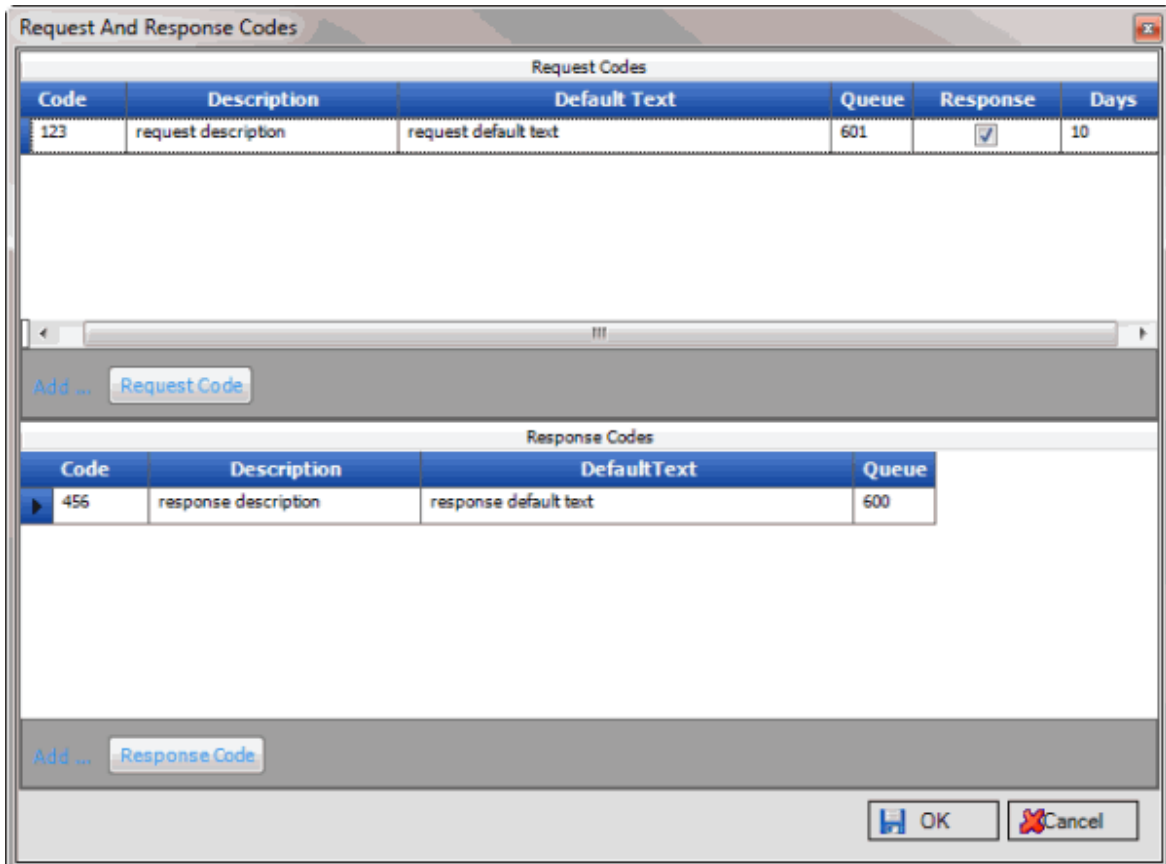
2. In the data grid, click the request code and then press the **Delete** key. A confirmation dialog box appears.

3. Click **Yes**. AIM deletes the request code and closes the window.

Add a Response Code

Use the **Request and Response Codes** window to add a response code.

To add a response code

1. In the menu bar, click **Tools** and then click **Request and Response Codes**. The **Request and Response Codes** window appears.
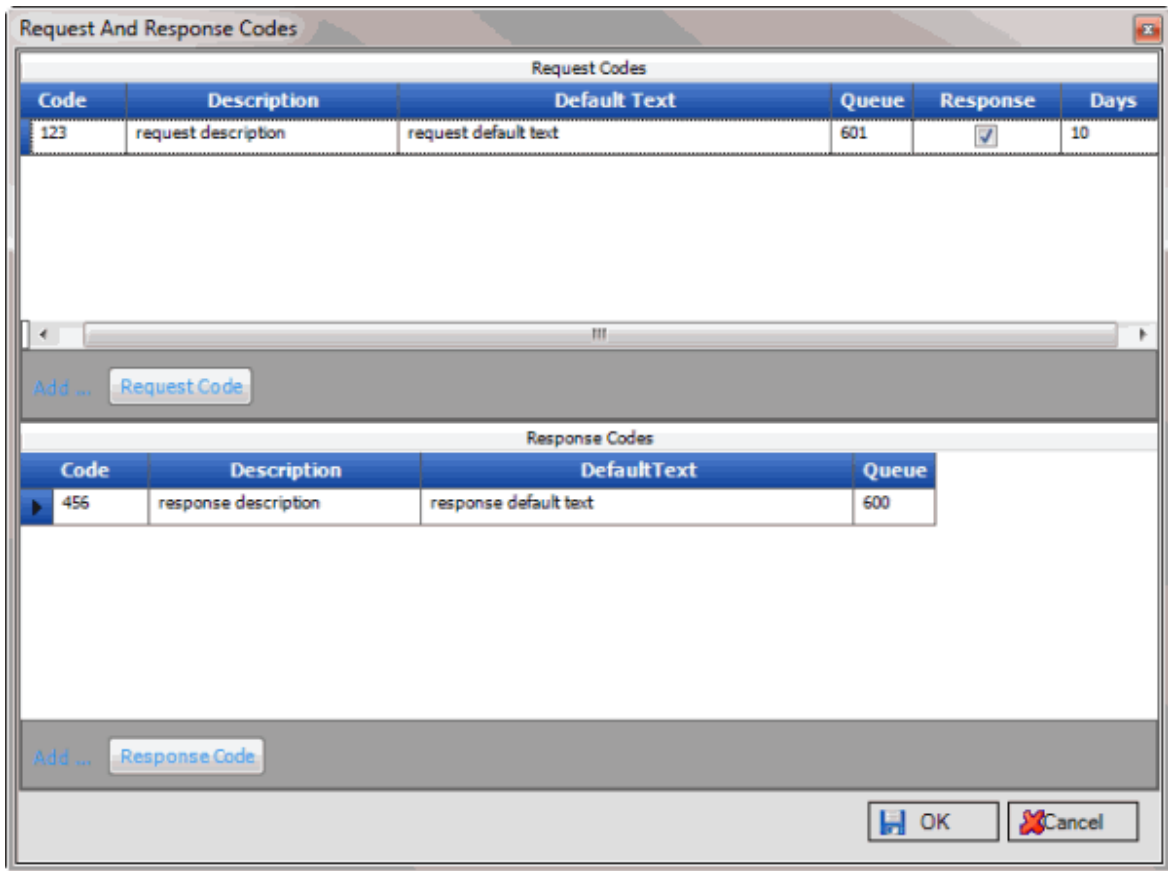
Code: Unique code that identifies the response.

Description: Description of the response.

Default Text: Default text to include in the response.

Queue: Work queue to assign to the response.

2. In the **Response Codes** section, click **Response Code**. A blank row appears in the data grid.

3. Complete the information and then click **OK**. AIM adds the response code to the data grid and closes the window.

Delete a Response Code

Use the **Request and Response Codes** window to delete a response code.

To delete a response code

1. In the menu bar, click **Tools** and then click **Request and Response Codes**. The **Request and Response Codes** window appears.
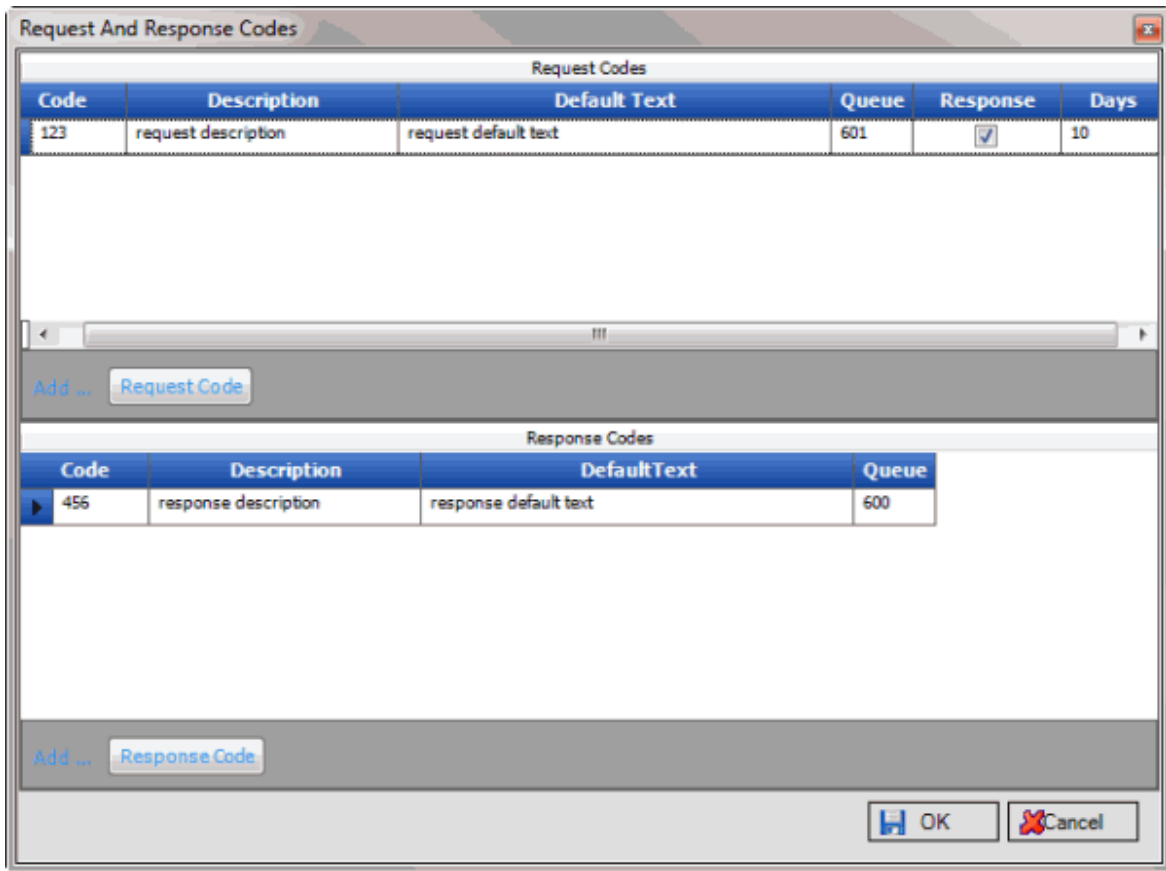
2. In the data grid, click the response code and then press the **Delete** key. A confirmation dialog box appears.

3. Click **Yes**. AIM deletes the response code and closes the window.

Email Message Templates

Email Message Templates

Use the **Email Templates** window to create customized email messages to notify agencies and attorneys when export files are ready for them. You can create email message templates using any standard HTML editor and include variables to insert specific AIM data.

Ensure the following:

- You selected the **Uses FTP** check box in the **Options** window.

- The FTP settings are correct on the **General** tab in the **Agencies/Attorneys** pane.

- A valid email address exists on the **General** tab in the **Agencies/Attorneys** pane.

Create an Email Message Template

Use the **Email Templates** window to create an email message template.

To create an email message template

1. In the menu bar, click **Tools** and then click **Email Templates**. The **Email Templates** window appears.
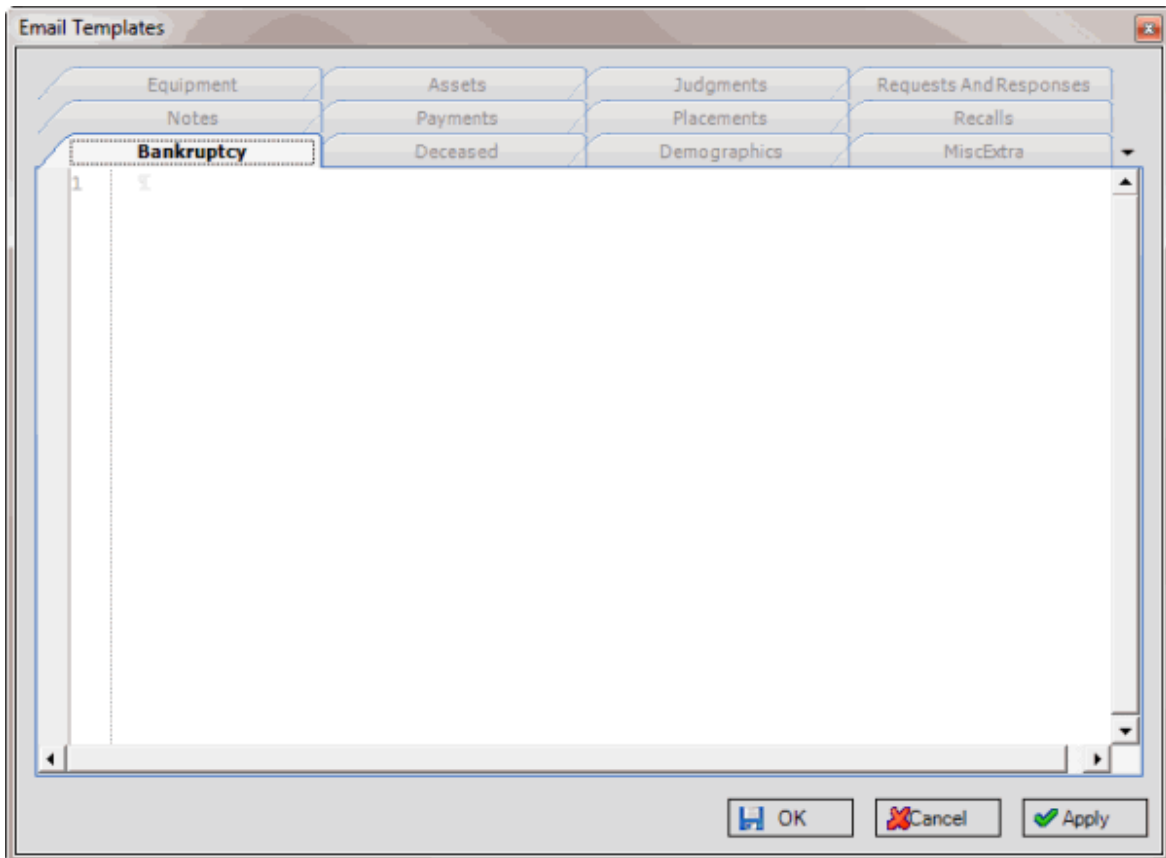
2. Click the tab that corresponds to the type of file for which to create the email message template.

3. Do one of the following:

    o To create a text email message template, type the email message into the template.

    o To create a customized HTML email message template, use any HTML editor and then copy and paste the content into the template.

Note: Formatting applies to HTML content only. Text messages don't contain formatting, such as paragraph breaks.

4. To include variables that insert AIM data into the email message when it's generated, type the variable into the template. For more information, see Email Message Template Variables. The following is an example of a template that uses variables.
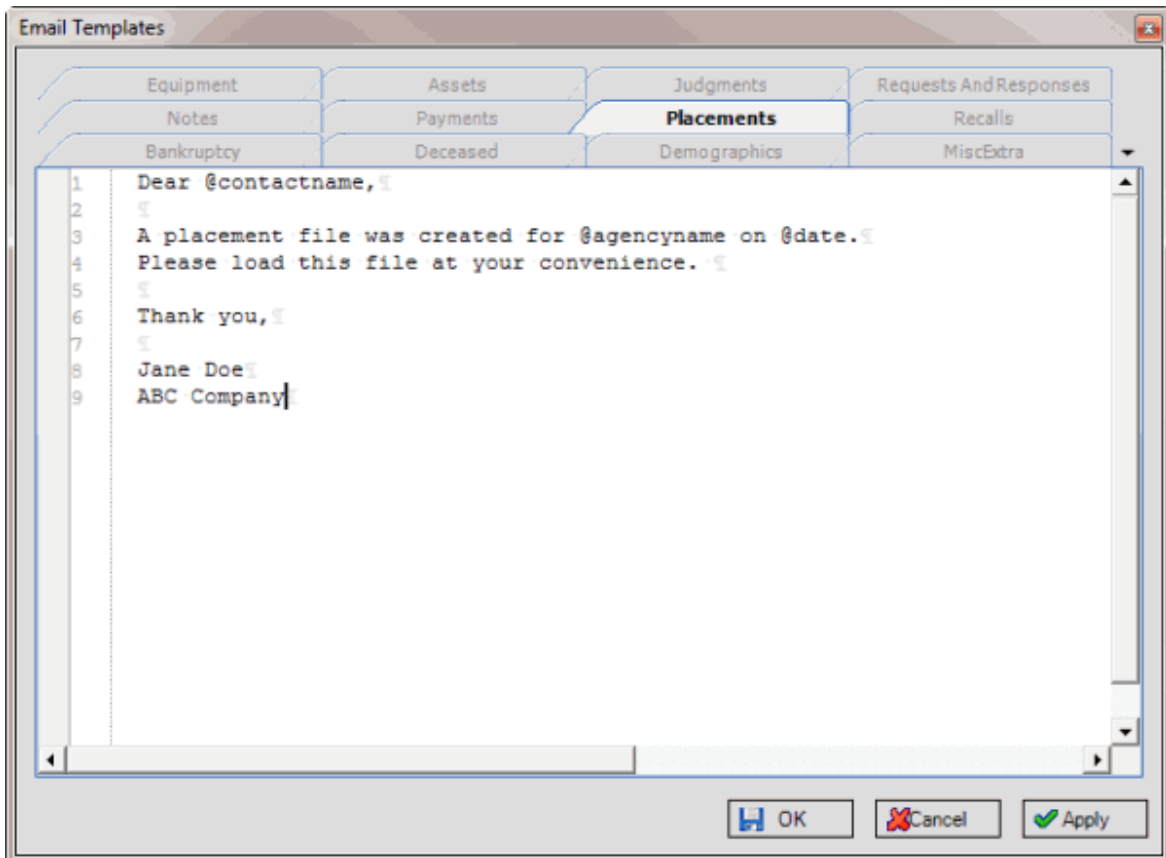
5. Click **OK**.

Email Message Template Variables

The following table describes the variables that are available when creating email message templates. When AIM generates email messages, it replaces the variable with the corresponding data from AIM.

Variable	Description
@contactname	Name of the contact person for the agency or attorney.
@agencyname	Name of the agency or attorney.
@date	Current date.
@agencyid	Numeric code that identifies the agency or attorney.
@batchid	Numeric code that identifies a placement or recall batch.
@batchfilehistoryid	No longer in use.

YGC Options

YGC Options

Use the **Options** window to specify how AIM handles codes returned in You've Got Claims (YGC) files. You can also use this window to map return messages and payment codes.

> **Note:** The **Automation** tab is obsolete.

Do the following steps in Latitude and AIM before sending and receiving accounts in YGC format using AIM.

Latitude

- Add law list information.

- Specify your organization's **You've Got Claims ID**.

- Create the YGC Conflict queue (600 or Clerical queue level) and set it in global settings. For assistance, contact Latitude by Genesys Support.

For more information, see the *Latitude* documentation.

AIM

- Link the law lists to attorneys on the **General** tab in the **Agencies/Attorneys** window. For more information, see Add an Agency or Attorney or Modify an Agency or Attorney.

Map a Return Message Code

Use the **Return Message Codes** tab in the **Options** window to map return message codes to a desk, queue level, and status. You can also indicate whether to recall accounts for a return message code. You can use these message codes to reset the desk, queue level, and status for accounts, and to recall accounts. AIM moves account information returned with conflicting codes (where reset information does not match) to the YGC Conflict queue in Latitude. AIM adds messages returned in YGC files for Record 39 to Latitude as legal messages and notes. Result and action codes appear as "YGC."

To map a return message code

1. In the menu bar, click **Tools** and then click **YGC Options**. The **Options** window appears, with the **Return Message Codes** tab selected.
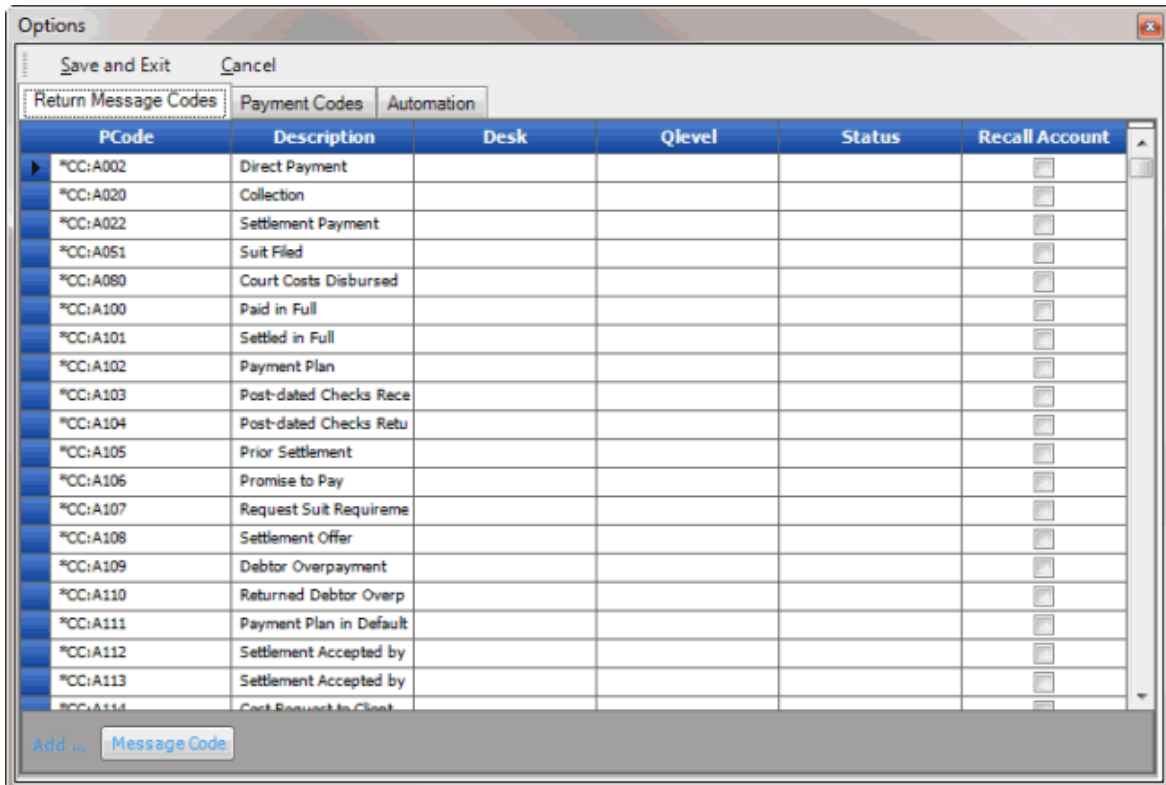
PCode: Code that identifies the return message.

Description: Description of the return message code.

Desk: Desk to assign to accounts with this message code.

Qlevel: Queue level to assign to accounts with this message code.

Status: Account status to assign to accounts with this message code.

Recall Account: If selected, the attorney returned the accounts with this return message code and the attorney no longer holds the accounts.

2. To add a return message code, click **Message Code**. AIM adds a blank row to the data grid.

3. Complete the information and then click **Save and Exit**.

Map a Payment Code

Use the **Payment Codes** tab in the **Options** window to map payment codes to amounts, payment batch types, and money buckets. You can also indicate whether to track ROI for portfolios, populate legal and accounting information in Latitude, and create a payment batch. AIM returns payment codes in YGC files for Record 30. AIM uses special processing for the first three payment codes (01, 03, and 06) that respects the fee schedule and creates an appropriate batch type for negative amounts.

To map a payment code

1. In the menu bar, click **Tools** and then click **YGC Options**. The **Options** window appears.

2. Click the **Payment Codes** tab.

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Code: Code that identifies the payment.

Description: Description of the payment code.

Field: Field in the YGC file that contains the transaction amount to apply to accounts with this payment code.

BatchType: Latitude batch type to assign to transactions with this payment code. It's not necessary for you to specify a batch type for payment codes 01, 03, or 06.

Bucket: Latitude money bucket to use when applying transactions to accounts with this payment code.

AIM Ledger: If selected, AIM tracks ROI for portfolios. AIM derives ROI information from Portfolio Manager.

Legal Ledger: If selected, AIM populates legal and accounting information in Latitude.

Process: If selected, AIM creates a payment batch for transactions received with this code. The payment batch corresponds to the specified batch type. After you import payment information, process the payment batch in Latitude.

3. To add a payment code, click **Payment Code**. AIM adds a blank row to the data grid.

4. Complete the information and then click **Save and Exit**.

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Queries

Queries

Query functionality is available in several areas of AIM to allow you to retrieve accounts that meet specific criteria. You can run a query to view, sort, group, and summarize the query results before implementing the query. A query window is available when creating or modifying account filters, placing or recalling accounts manually, specifying agency constraints, and updating forwarded fees.

Note: You can open a query that a user created using the **Account Analysis** tool in Latitude and run it in AIM.

The following is an example of a query window. Some sections are not available in certain query windows. For example, the Order section is only available when creating a query to place or recall accounts manually.
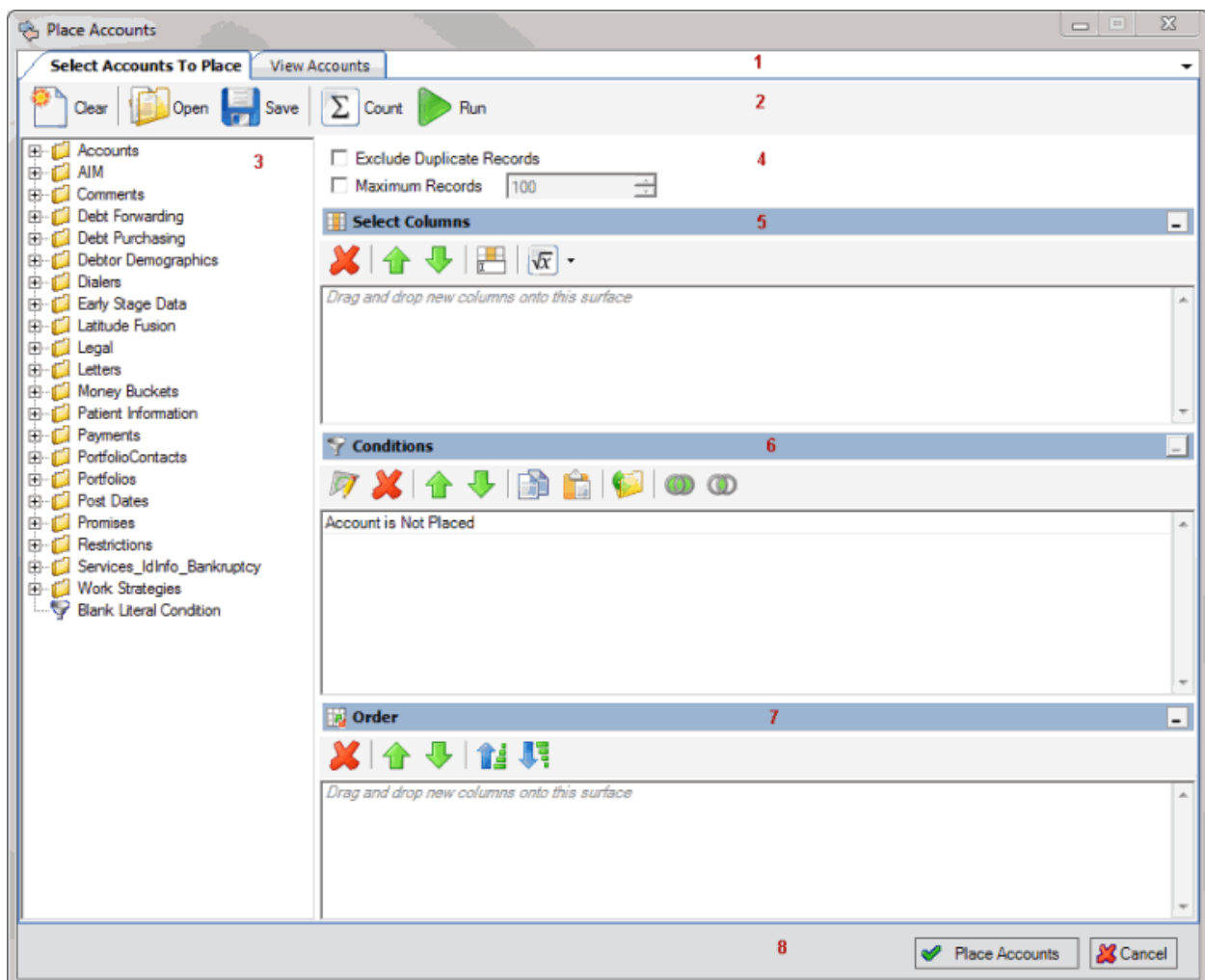
1. **Tabs:** Displays the tabs for creating and modifying queries, and viewing the results.

2. **Query Toolbar:** Displays the functions that are available for the query.

3. **Data Selection pane:** Displays the data available to include in the query.

4. **Options:** Displays options to apply to the query.

5. **Select Columns pane:** Displays the data columns to include in the query results.

6. **Conditions pane:** Displays the conditions for retrieving accounts.

7. **Order pane:** Displays the sort order for the query results.

8. **Window Toolbar:** Runs the query or closes the window without saving changes.

Query Columns

Query Columns

Use the **Select Columns** pane in a query window to specify the data columns to include in the query results. The **Select Columns** pane contains a default set of columns.

Add a Query Column

Use the **Select Columns** pane in a query window to add a column to display in the query results.

To add a query column

1. With a query window open, in the **Data Selection** pane, click the plus sign (**+**) next to a folder to expand it.
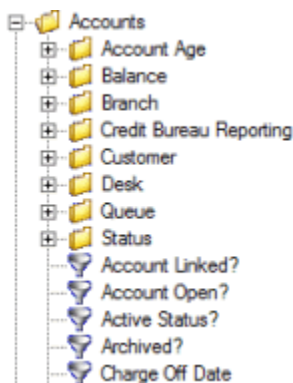
2. Click the data item to display in a column in the query results and drag and drop it in the **Select Columns** pane.
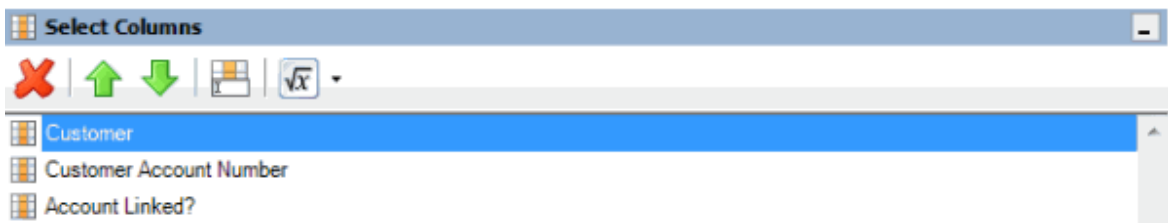
3. Drag and drop more data items as necessary.

Modify the Query Column Order

Use the **Select Columns** pane in a query window to change the order in which columns of data appear in the query results.

To modify the query column order

1. With a query window open, go to the **Select Columns** pane.

2. To move up a column in the list, click the column and then, in the toolbar, click the up arrow.

3. To move down a column in the list, click the column and then, in the toolbar, click the down arrow.

Modify a Query Column Name

Use the **Select Columns** pane in a query window to modify the name of a column that appears in the query results.

To modify a query column name

1. With a query window open, go to the **Select Columns** pane.
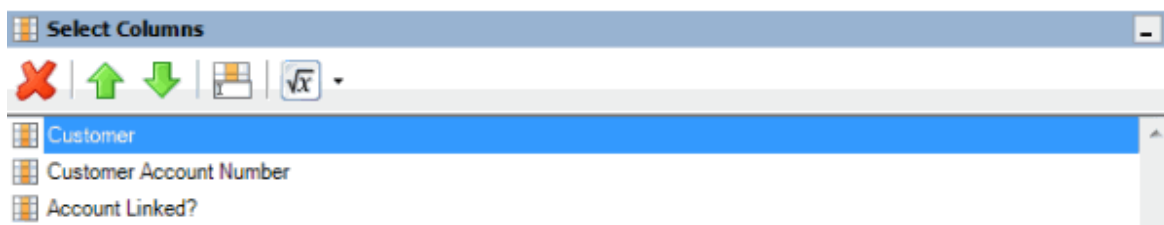
2. Do one of the following:

   o Click the column and then, in the toolbar, click the Rename icon.

   o Right-click the column and then click **Rename**. The query designer clears the column name and displays a blank box to allow you to modify the name.
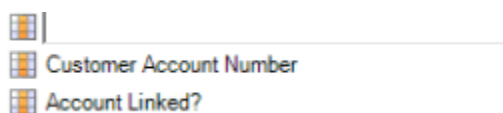
3. In the box, type the new name for the column and then press **Enter**. The original column name appears with the new name appended. For example, if you change the **Customer** column to **Client**, The query designer changes the column name to **Customer as Client**.

Delete a Query Column

Use the **Select Columns** pane in a query window to delete a column from the query so that the query designer doesn't include it in the query results.

To delete a query column

1. With a query window open, go to the **Select Columns** pane.
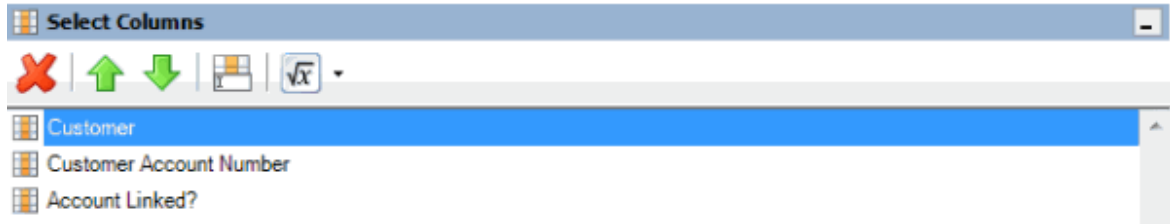
2. Do one of the following:

   o Click the column and then, in the toolbar, click the Delete icon.

   o Click the column and then press the **Delete** key.

   o Right-click the column and then click **Delete**. A confirmation dialog box appears.

3. Click **Yes**.

Assign an Aggregate Function to a Query Column

Use the **Select Columns** pane in a query window to assign an aggregate function to a column. When you run the query, the query results show the aggregated values in the column instead of the actual value. Non-aggregated columns create the groups represented by the aggregated data. For more information about aggregate functions, see Aggregate Functions.

To assign an aggregate function to a query column

1. With a query window open, go to the **Select Columns** pane.
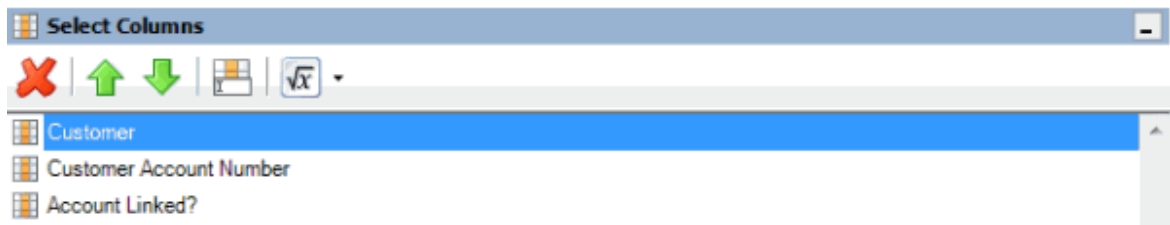
2. Click the column and then, in the toolbar, click the arrow next to the Aggregate icon. A list of functions appears.
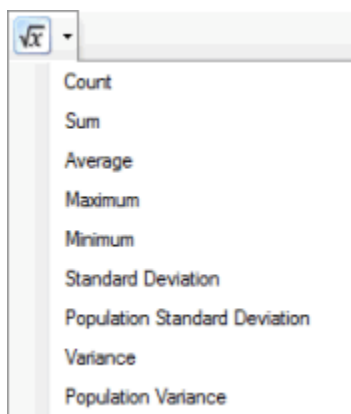
3. Click a function. The original column name appears with the aggregate function name appended. For example, if you selected the "average" function for the **Linked Current Balance**

column, the **Linked Current Balance** column name changes to **Average of Linked Current Balance**. In the query results, the average account balance for all the linked accounts appears.

4. To delete an aggregated function, click the column name and then click the Aggregate icon.

Aggregate Functions

The following table describes the functions that are available when aggregating data. The functions available for an item are based on the item's data type.

Function	Description
Count	Counts the number of records for the grouping.
Sum	Totals the values within the grouping.
Average	Averages the values within the grouping.
Maximum	Calculates the highest value within the grouping.
Minimum	Calculates the lowest value within the grouping.
Standard Deviation	Averages the difference from the mean value of the entire set of accounts included.
Population Standard Deviation	Averages the difference from the mean value within the grouping.
Variance	Squares the standard deviation.
Population Variance	Squares the standard deviation within the grouping.
Eliminate Duplicates	Changes the equation to add the "distinct" clause. You can use this function with any aggregate after the initial selection.
Remove Aggregate	Deletes the aggregate function and returns the column to its literal value.

Query Conditions

Query Conditions

Use the **Conditions** pane in a query window to specify the criteria for data to include in the query results.

Create a Query Condition

Use the **Conditions** pane in a query window to specify the criteria for which data to include in the query results. Queries contain a default condition to include only the accounts that an agency or attorney doesn't hold. You cannot delete this condition.

To create a query condition

1. With a query window open, in the **Data Selection** pane, click the plus sign (**+**) next to a folder to expand it.
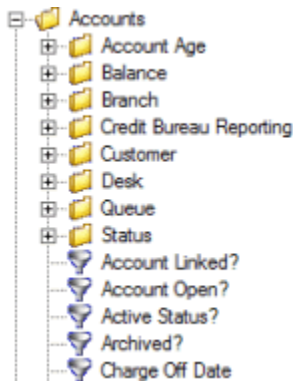
2. Click the data item for which to set a condition and drag and drop it in the **Conditions** pane. A dialog box appears, which allows you to specify the criteria. The title of the dialog box and the information displayed depend on the condition selected.

   The following example shows the **Current Balance** dialog box that appears when you drag and drop the **Current Balance** data item into the **Conditions** pane.
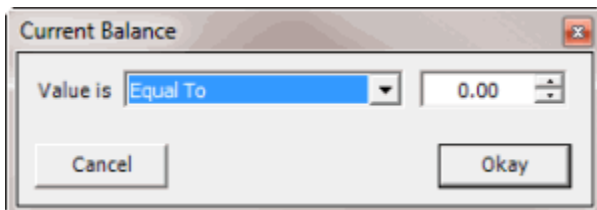
3. In the dialog box, specify the criteria and then click **Okay**. The condition appears in the **Conditions** pane. In the following example, the condition indicates you want to include in the query results accounts with a current balance that is greater than or equal to "$2,000."
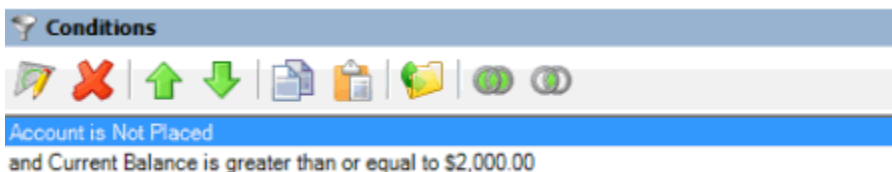
4. Continue specifying conditions as necessary.

Modify a Query Condition

Use the **Conditions** pane in a query window to modify a query condition.

To modify a query condition

1. With a query window open, go to the **Conditions** pane.
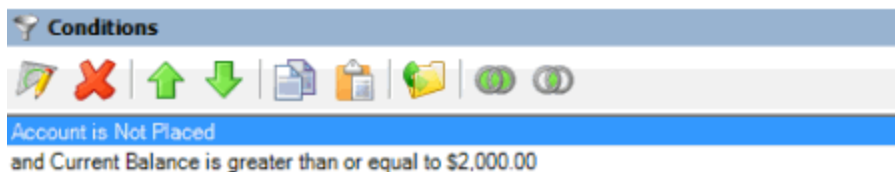
2. Do one of the following:

    - Click a condition and then, in the toolbar, click the Edit icon.

    - Double-click a condition.

    - Right-click a condition and then click **Edit**.

    A dialog box appears, which allows you to modify the criteria. The title of the dialog box and the information displayed depends on the condition selected.
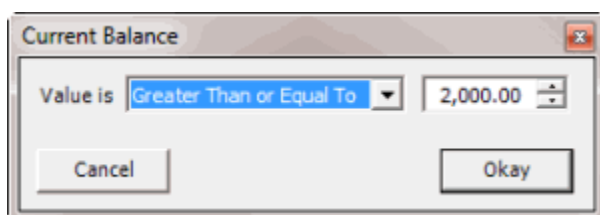
3. In the dialog box, modify the criteria and then click **Okay**. The **Conditions** pane reflects the update.

Copy a Query Condition

Use the **Conditions** pane in a query window to copy a query condition.

To copy a query condition

1. With a query window open, go to the **Conditions** pane.
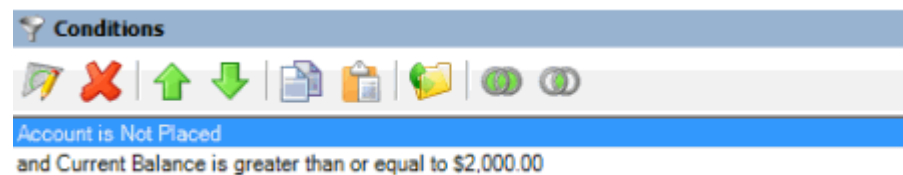
2. Do one of the following:

    - Click the condition and then, in the toolbar, click the Copy icon.

    - Right-click the condition and then click **Copy**.

    The query designer copies the condition to the Clipboard.

3. In the **Conditions** pane, do one of the following:

    - Click where you want to copy the condition and then, in the toolbar, click the Paste icon.

    - Right-click where you want to copy the condition and then click **Paste**.

    The query designer pastes the condition in the specified location.

Group Query Conditions

Use the **Conditions** pane in a query window to separate conditions into groups when you require complex data mining.

To group query conditions

1. With a query window open, go to the **Conditions** pane.
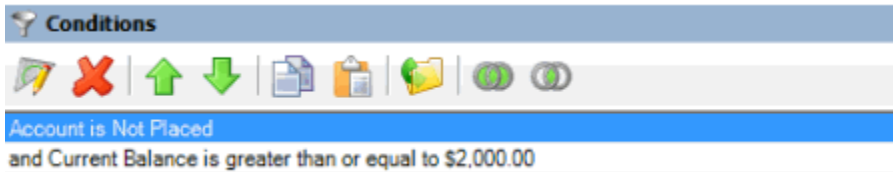
2. Click the conditions to group.

    Tip: To select multiple sequential conditions, press and hold the **Shift** key and click the first and last sequential condition. To select multiple non-sequential conditions, press and hold the **Ctrl** key and click each individual condition. To select all conditions, right-click and then click **Select All**.

3. Do one of the following:

    o   In the toolbar, click the Group icon.

    o   Right-click the selected conditions and then click **Group**.

    The query designer groups the selected conditions and identifies the beginning and ending of the group.
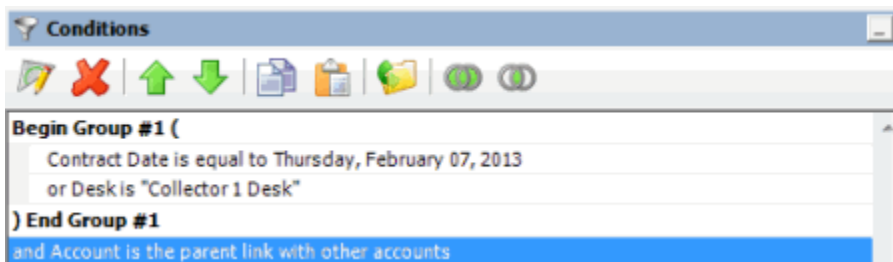
4. Continue grouping conditions as necessary. The following example shows a complex grouping of conditions.
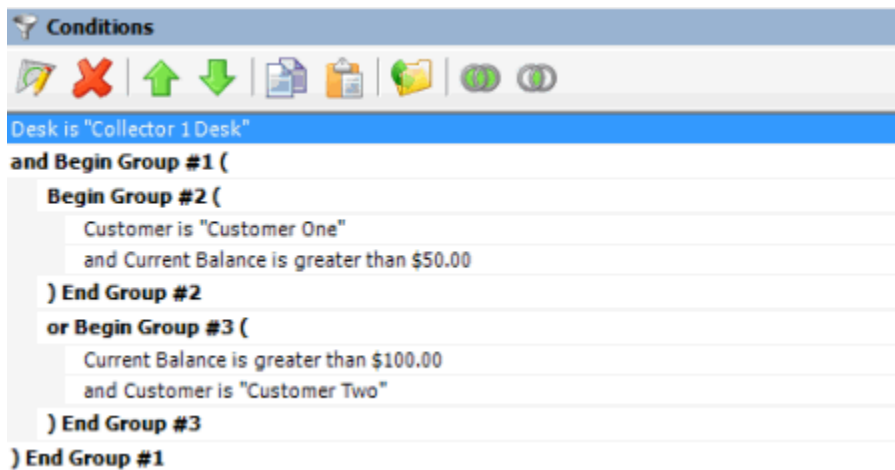
Modify the Query Condition Order

Use the **Conditions** pane in a query window to modify the order in which to evaluate conditions.

To modify the query condition order

1. With a query window open, go to the **conditions** pane.
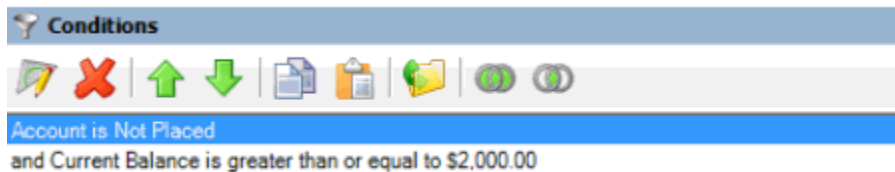
2. To move up a condition in the list, click the condition and then, in the toolbar, click the up arrow.

3. To move down a condition in the list, click the condition and then, in the toolbar, click the down arrow.

Set a Query Condition to Optional or Required

Use the **Conditions** pane in a query window to set a query condition to optional or required using Boolean operators (OR, AND). The query designer sets conditions to "required" by default. If a query has a single condition, the query requires that condition and you cannot set it to optional. If a query has more than one condition, you can set each condition that follows the first condition in the list to required or optional. For more information about Boolean operators, see Boolean Operators.

To set a query condition to optional or required

1. With a query window open, go to the **Conditions** pane.
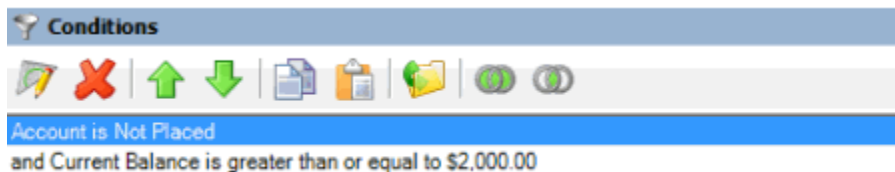
2. To change the query so that only one condition has to be true for an account to appear in the query results, do one of the following:

- Click the second condition and then, in the toolbar, click the OR icon.

- Right-click the second condition and then click **Set Condition Optional**.

The condition changes from "and" to "or."

3. To change the query to require both conditions for an account to appear in the query results, do one of the following:

- Click the second condition and then, in the toolbar, click the AND icon.

- Right-click the second condition and then click **Set Condition Required**.

The condition changes from "or" to "and."

Delete a Query Condition

Use the **Conditions** pane in a query window to delete a condition from a query.

To delete a query condition

1. With a query window open, go to the **Conditions** pane.
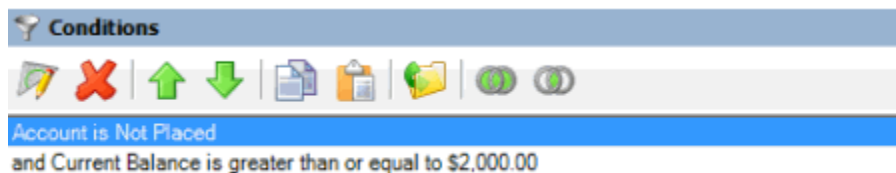
2. Do one of the following:

- Click the condition and then, in the toolbar, click the Delete icon.

- Click the condition and then press the **Delete** key.

- Right-click the condition and then click **Delete**.

A confirmation dialog box appears.

3. Click **Yes**.

Boolean Operators

Boolean operators allow you to set a query condition to optional or required.

AND condition

The AND condition sets a condition to required.

In the following example, both conditions must be true for an account to appear in the query results. So, if an account contract date is "February 7, 2013" and the Desk is "Collect 1 Desk," the query results include the account. If an account contract date is "February 7, 2013" but the Desk is not "Collect 1 Desk," the query results don't include the account. If an account contract date is not "February 7, 2013" but the Desk is "Collect 1 Desk," the query results don't include the account.
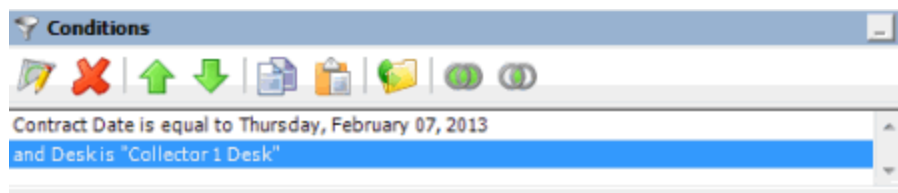
OR condition

The OR condition sets a condition to optional.

In the following example, if an account contract date is "February 7, 2013" but the Desk is not "Collect 1 Desk," the query results include the account. If an account contract date is not "February 7, 2013" but the Desk is "Collect 1 Desk," the query results include the account. If an account contract date is "February 7, 2013" and the Desk is "Collect 1 Desk," the query results include the account. If an account contract date is not "February 7, 2013" or the Desk is not "Collect 1 Desk," the query results don't include the account.
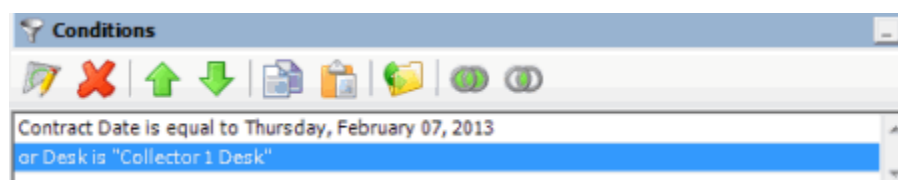
Query Condition Types

You use query conditions when creating and running queries. For each condition you select for your query, you specify the criteria to use to evaluate accounts. The criteria available is based on the condition type.

Each condition is one of the following types:

- Dates

- Single option

- Multiple option

Dates

Date conditions allow you to query accounts based on a specific date, date range, any date or blank date, or relative date. When you select a date condition, a dialog box displays to allow you to specify the date criteria. The criteria available depends on the value you select in the **Value is** list box, and whether you select the **Relative** check box.

Specific date

Use one of the following comparisons to evaluate accounts based on a specific date:

Value is	Description
Equal To	Retrieves accounts where the date matches a specific date.

Not Equal To	Retrieves accounts where the date does not match a specific date.
Later Than or Equal To	Retrieves accounts where the date matches or comes after a specific date.
Earlier Than or Equal To	Retrieves accounts where the date matches or comes before a specific date.
Later Than	Retrieves accounts where the date comes after a specific date.
Earlier Than	Retrieves accounts where the date comes before a specific date.

In the following example, the system retrieves accounts where the **Closed Date** is 01/01/2012.
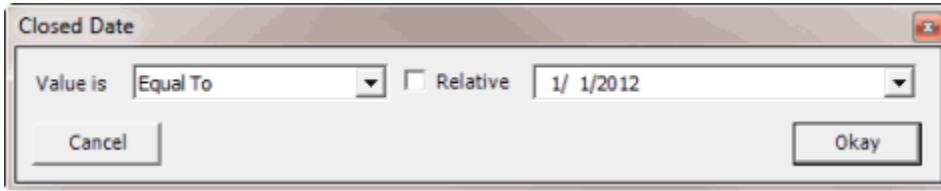
Date range

Use one of the following comparisons to evaluate accounts based on a date range:

Value is	Description
Between	Retrieves accounts where the date falls between two specific dates.
Not Between	Retrieves accounts where the date comes before a specific start date or after a specific end date, but not between the two dates.

In the following example, the system retrieves accounts where the **Closed Date** falls on or between 01/01/2012 and 02/01/2012.
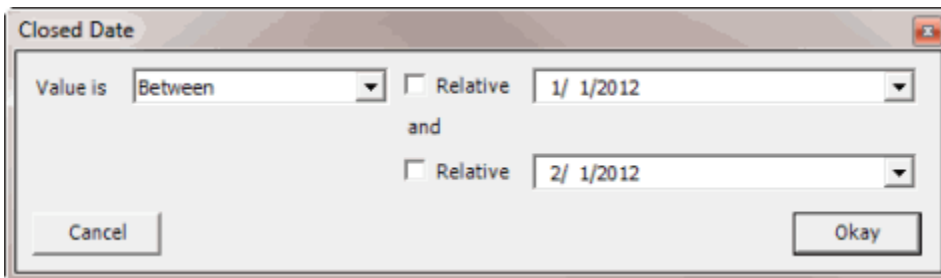
Any date or blank date

Use one of the following comparisons to evaluate accounts based on whether a date is blank or contains any value:

Value is	Description

No Value	Retrieves accounts where the date is blank.
Any Value	Retrieves accounts where the date is any date or blank.

In the following example, the system retrieves accounts where the **Closed Date** is blank (doesn't contain a value).
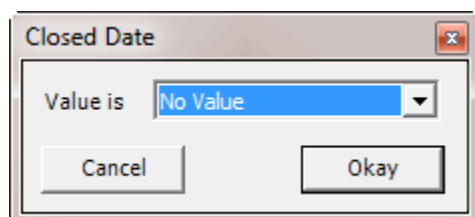
Relative date

Use the relative date option to evaluate accounts based on the relation of a date to the current date. You specify a comparison and the criteria to use to calculate the relative date. The criteria are the number of days, months or years from the current date, and whether to add or subtract that number from the current date.

Use one of the following comparisons to evaluate accounts based on the calculated relative date:

Value is	Description
Equal To	Retrieves accounts where the date matches the relative date.
Not Equal To	Retrieves accounts where the date does not match the relative date.
Later Than or Equal To	Retrieves accounts where the date matches or comes after the relative date.
Earlier Than or Equal To	Retrieves accounts where the date matches or comes before the relative date.
Later Than	Retrieves accounts where the date comes after the relative date.
Earlier Than	Retrieves accounts where the date comes before the relative date.

In the following example, the system retrieves accounts where the **Closed Date** is two days before the current date.
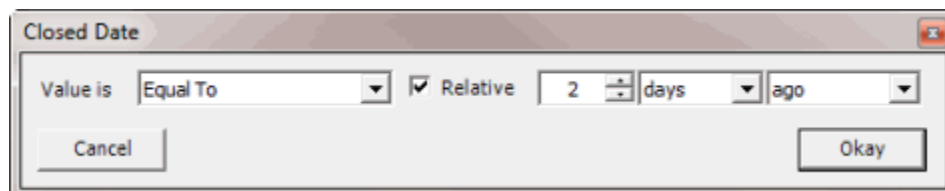
Single option

Single option conditions allow you to retrieve accounts that match a single option in a group of options. In the following example, the system retrieves accounts that are the parent link to other accounts.
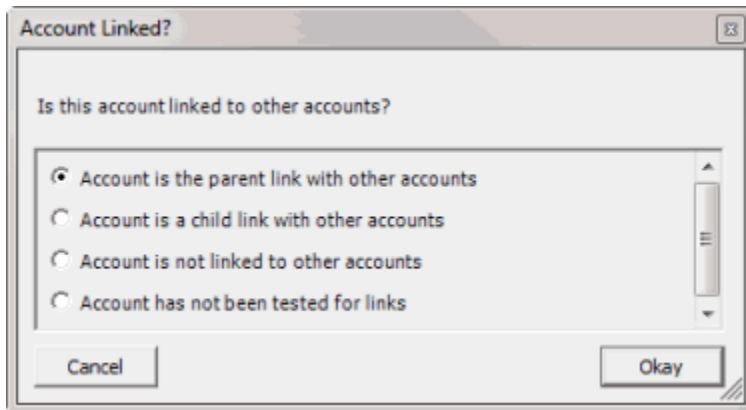
Multiple option

Multiple option conditions allow you to retrieve accounts that match one or more options in a group of options. In the following example, the system retrieves accounts assigned to the POD desk and accounts assigned to the POOL desk.
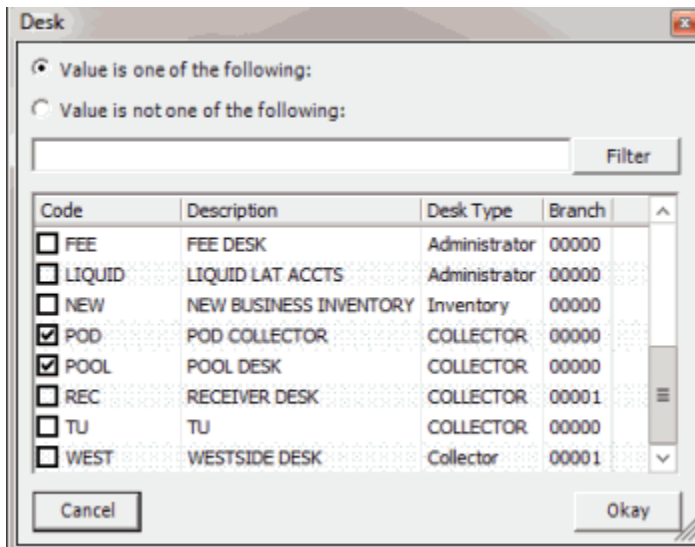
Query Order

Query Order

Use the **Order** pane in a query window to specify the sort order for the data returned in the query results. For example, if the **Order** pane includes desk and customer, the system sorts the query results first by desk and then by customer within the desk.

Specify the Query Sort Order

Use the **Order** pane in a query window to specify the sort order for the query results.

To specify the query sort order

1. With a query window open, in the **Data Selection** pane, click the plus sign (**+**) next to a folder to expand it.
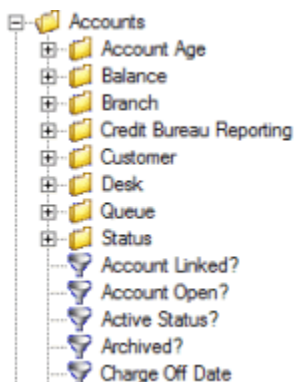
2. Click the data item to use to sort the query results and drag and drop it into the **Order** pane.

> **Note:** If there is a **Select Columns** pane, you can sort by aggregate data by dragging the aggregated column from the **Select Columns** pane and dropping it into the **Order** pane. For more information about aggregating data, see Assign an Aggregate Function to a Query Column.

3. Drag and drop more data items as necessary.

Modify the Sort Order

Use the **Order** pane in a query window to modify the sort order for the query results.

To modify the sort order

1. With a query window open, go to the **Order** pane.

2. To move up a data item in the list, click the data item and then, in the toolbar, click the up arrow.

3. To move down a data item in the list, click the data item and then, in the toolbar, click the down arrow.

Set the Sort Order to Ascending

Use the **Order** pane in a query window to set the sort order for a data item to ascending order.

To set the sort order to ascending

1. With a query window open, go to the **Order** pane.

2. Do one of the following:

    o Click the data item and then, in the toolbar, click the Ascending icon.

    o Right-click the data item and then click **Set Ascending Order**.

Set the Sort Order to Descending

Use the **Order** pane in a query window to set the sort order for a data item to descending order.

To set the sort order to descending

1. With a query window open, go to the **Order** pane.

2. Do one of the following:

    o Click the data item and then, in the toolbar, click the Descending icon.

    o Right-click the data item and then click **Set Descending Order**.

Delete a Data Item From the Sort

Use the **Order** pane in a query window to delete a data item from the query results sort order

To delete a data item from the sort

1. With a query window open, go to the **Order** pane.


2. Do one of the following:

    o Click the data item and then, in the toolbar, click the Delete icon.

    o Click the data item and then press the **Delete** key.

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o   Right-click the data item and then click **Delete**.

A confirmation dialog box appears.

3.   Click **Yes**.

Query Results

Query Results

Use the **Results** tab in a query window to view the results of a query, and change the view.

Run a Query

Use the **Results** tab in a query window to view the results of a query.

To run a query

1.   Open a query window. The following example is for the **Place Accounts** query window.
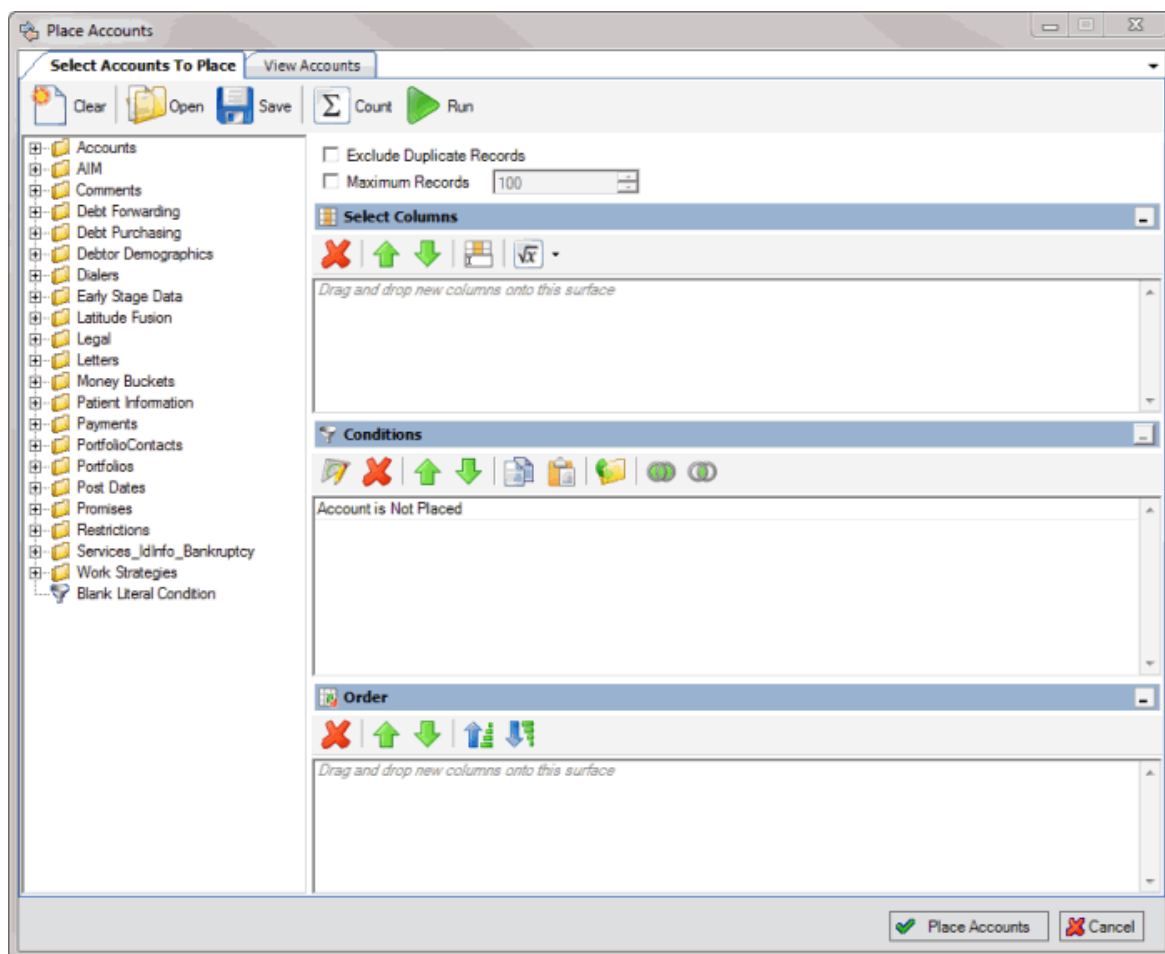
2.   To count the number of records that match the criteria, do the following:

1.   In the toolbar, click **Count**. The **Query Designer** dialog box appears.
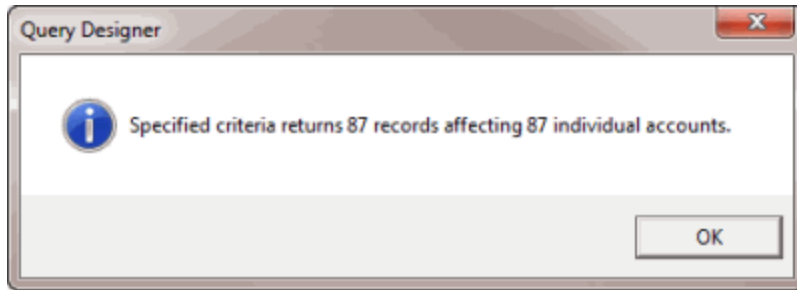
b. Click **OK**.

3. To view the query results, in the toolbar, click **Run**. The query results appear on a query results tab. In the following example, the **View Accounts** tab contains the query results.

Arrange Column Headings

Use the **Results** tab in a query window to change the order in which columns appear in the query results.

To arrange column headings

1. In the query window toolbar, click **Run**. The results appear on a query results tab. In the following example, the **View Accounts** tab contains the query results.

2. Click a column heading and drag it to the new location.

3. When two red arrows appear in the location where you want to place the column, release your mouse button.

Pin a Column

Use the **Results** tab in a query window to pin a column in the query results so that it remains stationary when you scroll horizontally.

To pin a column

1. In the query window toolbar, click **Run**. The results appear on a query results tab. In the following example, the **View Accounts** tab contains the query results.

2. In the column heading, click the Pushpin icon. The pushpin points down to indicate that the column is pinned.

3. Scroll horizontally in either direction and the pinned column remains stationary.

Sort Query Results

Use the **Results** tab in a query window to sort the query results.

To sort query results

1. In the query window toolbar, click **Run**. The results appear on a query results tab. In the following example, the **View Accounts** tab contains the query results.

2. Click a column heading. An arrow that points upward appears next to the column heading to indicate that the system sorted the column in ascending order.

3. To sort the column in descending order, click the column heading again. The arrow points downward to indicate that the system sorted the column in descending order.

Group Accounts

Use the **Results** tab in a query window to group accounts in the query results.

To group accounts

1. In the query window toolbar, click **Run**. The results appear on a query results tab. In the following example, the **View Accounts** tab contains the query results.

2. Click a column heading, drag it into the space above the column headings, and drop it. The system groups the accounts on the specified column. The following example shows accounts grouped by customer.
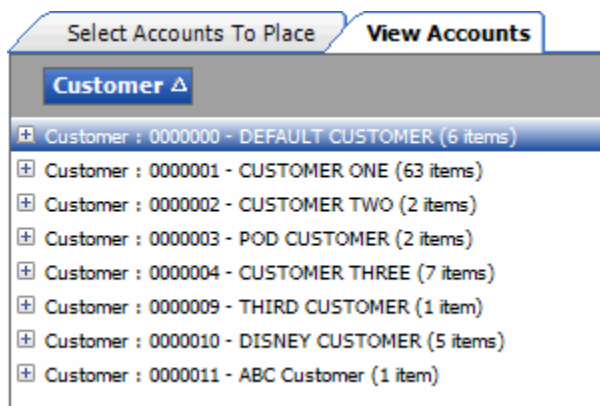
3. To view the accounts in a group, click the plus sign (+) next to the group to expand it.

4. To add a group within a group, do the following:

    1. Click the plus sign (+) next to the group to expand it.

    2. Click a column heading, drag it into the space above the column headings, and drop it.
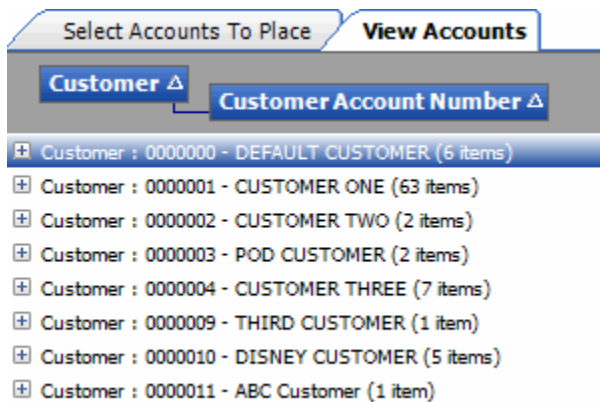
5. Click the plus sign (+) next to the group to expand it.
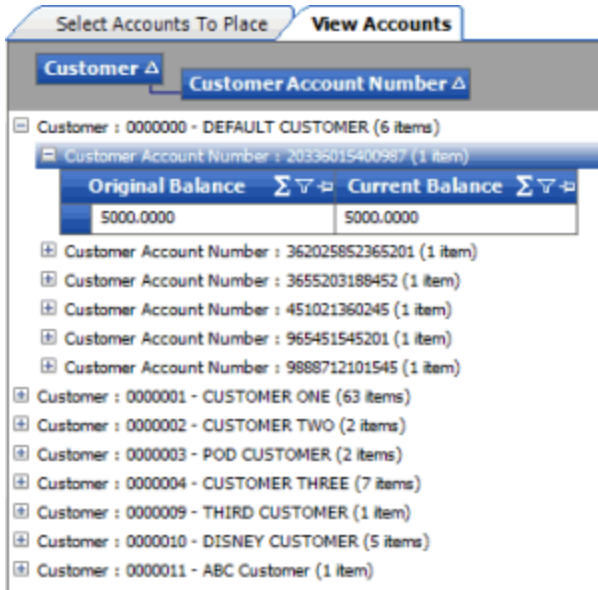
6. The system sorts the groups in ascending order by default. To change the sort for a group, click the group heading.

7. To delete a group, click the group heading and drag and drop it back into the query results space.

Summarize Query Data

Use the **Results** tab in a query window to summarize query results.

To summarize query data

1. In the query window toolbar, click **Run**. The results appear on a query results tab. In the following example, the **View Accounts** tab contains the query results.

2. In the column heading, click the Sigma icon. The **Select Summaries** dialog box appears. The options available are based on the item's data type.

3. Select the calculations to perform on the data and then click **OK**. The result appears in the last row of the data grid. If you grouped data, the system calculates the data for each group and displays the results in the last row for each group.

Customer Σ▽◘	SSN Σ▽◘	Balance (P+I) Σ▽◘	Balance (P) Σ▽◘	Queue Σ▽◘
0000010		1500.0000	1500.0000	015
0000010		1025.0000	1000.0000	015
0000010	999887777	26000.0000	25000.0000	015
0000010	999988777	52000.0000	50000.0000	015
0000010	124588812	15000.0000	15000.0000	875
0000010	789787897	15000.0000	15000.0000	015
0000010	555555555	5010.0000	5000.0000	015
0000011		2020.0000	1000.0000	015

Grand Summaries

Average = 1527.71694...

Export Query Results

Use the **Results** tab in a query window to export the results of a query. The export function isn't available in certain query windows.

To export query results

1. In the query window toolbar, click **Run**. The results appear on a query results tab. In the following example, the **View Accounts** tab contains the query results.

2. To export the results to a Microsoft Excel file, do the following:

   1. Click **Export to Excel**. The **Save As** dialog box appears.

   2. In the **File name** box, type a name for the file and then click **Save**.

Filter Query Results

Use the **Results** tab in a query window to filter query results.

To filter query results

1. In the query window toolbar, click **Run**. The results appear on a query results tab. In the following example, the **View Accounts** tab contains the query results.

2. In the column to filter, click the Funnel icon. A list of options for the specified column appears.

(All): If selected, the system didn't filter the results.

(Custom): If selected, allows you to set custom filtering conditions.

(Blanks): If selected, the system limits the results to accounts with a blank or null value in the specified column.

(NonBlanks): If selected, the system limits the results to accounts that don't have a blank or null value in the specified column.

3. Click any value other than **(Custom)**. The list closes and the query results only include the records that match the specified filter.

4. To set custom filter criteria, do the steps to Set Custom Filter Criteria.

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Set Custom Filter Criteria

Use the **Enter Filter Criteria for…** dialog box to specify selection criteria for any column in the query results. You can combine selection criteria (or conditions) to create more complex filters. The full name of the dialog box is based on the column you are filtering.

To set custom filter criteria

1. In the query window toolbar, click **Run**. The results appear on a query results tab. In the following example, the **View Accounts** tab contains the query results.

2. In the column heading of the column to filter, click the Funnel icon. A list of options for the specified column appears.

3. Click **(Custom)**. The **Enter Filter Criteria for…** dialog box appears. The following example shows the dialog box for the **Customer** column.
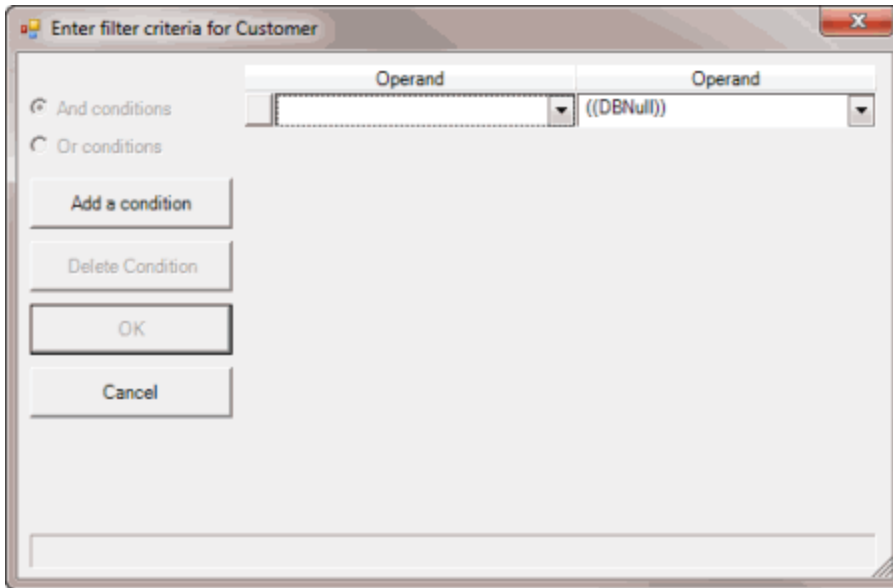
4. In the first **Operand** list box, click an operator. For more information, see Custom Filter Operators.

5. In the **Operand** list box, click or type an operand. In the previous example, the operator is "= Equals" and the operand is "0000001 - CUSTOMER ONE." The condition appears in the lower portion of the dialog box.

6. To add conditions, click **Add a condition**. A blank row appears.

7. To delete a condition, click the condition and then click **Delete Condition**.

8. If you set multiple conditions, do one of the following:

- To set the filter so that all the conditions have to be true for an account to appear in the query results, click **And conditions**. For example, customer does not equal "0000001 - CUSTOMER ONE" and customer does not equal "0000002 - CUSTOMER TWO" means that you want to see accounts for all customers except Customer One and Customer Two.

- To set the filter so that only one condition has to be true for an account to appear in the query results, click **Or conditions**. For example, customer equals "0000001 - CUSTOMER ONE" or customer equals "0000002 - CUSTOMER TWO" means that you only want to see accounts for Customer One or Customer Two.

9. When finished creating the custom filter, click **OK**.

Custom Filter Operations

The following table describes the operators that are available when setting custom filter criteria for query results, reports, or when previewing account placements. The operators available for a data item are based on the item's data type.

Operator	Description
Equals	Retrieves accounts where the data matches the specified value.

Does not equal	Retrieves accounts where the data does not match the specified value.
Less than	Retrieves accounts where the data is less than the specified value.
	This operator is for date and numeric data types only.
Less than or equal To	Retrieves accounts where the data is less than or equal to the specified value.
	This operator is for date and numeric data types only.
Greater than	Retrieves accounts where the data is greater than the specified value.
	This operator is for date and numeric data types only.
Greater than or equal To	Retrieves accounts where the data is greater than the specified value.
	This operator is for date and numeric data types only.
Like	Retrieves accounts where data matches the specified pattern.
	This operator is for alphanumeric data types only.
Matches Regular Expression	Retrieves accounts where the system stores data in the specified format.
	This operator is for alphanumeric data types only.
	^[A-Z] finds all values in uppercase character format only. ^[a-z] finds all values in lowercase character format only.
	^[0-9] finds all values in numeric format only.
	^[A-Za-z] finds all values in mixed case character format.
	^[A-Za-z] finds all values in mixed case character format.
	^[^0-9]+$ finds all values with a numeric format and dollar sign.
	^[A-Za-z0-9] [A-Za-z0-9_]*$ finds all values of mixed case and currency.
Starts with	Retrieves accounts where data starts with the specified character or characters.
	This operator is for alphanumeric data types only.
Contains	Retrieves accounts where data contains the specified character or characters.
	This operator is for alphanumeric data types only.
Ends with	Retrieves accounts where data ends with the specified character or characters.
	This operator is for alphanumeric data types only.
Does not start with	Retrieves accounts where data does not start with the specified character or characters.

	This operator is for alphanumeric data types only.
Does not contain	Retrieves accounts where data does not contain the specified character or characters. This operator is for alphanumeric data types only.
Does not end with	Retrieves accounts where data does not end with the specified character or characters. This operator is for alphanumeric data types only.
Does not match	Retrieves accounts where data does not match the specified character or characters. This operator is for alphanumeric data types only.
Not like	Retrieves accounts where data is not like the specified pattern. This operator is for alphanumeric data types only.

Agencies and Attorneys

Agencies and Attorneys

Use the **Agencies/Attorneys** pane to add outside agencies and attorneys to AIM, and maintain that information. You can manage close status codes, set account constraints, and view file export and import history. Specify all global settings before adding agencies or attorneys as these settings control how AIM applies agency fees to payments, and the import and export process. For more information, see Global Settings.

To open the Agencies/Attorneys pane

Do one of the following:

- To add an agency or attorney, in the **AIM** window, in the submenu bar, click **Add** and then click **Agencies/Attorneys**.

- To modify an agency or attorney, in the **Navigation** pane, click **Agencies/Attorneys** and then click the agency or attorney.

The **Agencies/Attorneys** pane appears with the **General** tab selected.

1. **Menu bar:** Displays options for maintaining agencies and attorneys.

2. **Tabs:** Displays the tabs for maintaining agencies and attorneys.

Add an Agency or Attorney

Use the **General** tab in the **Agencies/Attorneys** pane to add an outside agency or attorney to AIM.

To add an agency or attorney

1. Do one of the following:

   o   In the **AIM** window, in the submenu bar, click **Add** and then click **Agency**. The
       Agencies/Attorneys pane appears with the **General** tab selected.

   o   If the **Agencies/Attorneys** pane is open, in the menu bar, click **Add Agency/Attorney**.
       AIM clears the data from the pane to allow you to add an agency or attorney.

General

ID: Internal code that Latitude assigns to identify the agency or attorney.

Alpha Code/YGC ID: External code used to identify the agency or attorney. AIM uses this code when creating folders and files for the agency or attorney.

Name: Name of the agency or attorney.

Tier: Number your company assigns to the agency that AIM uses for selection purposes in conditions and reports.

Group: Name of the group to assign to the agency or attorney. You can specify an existing group (shown as a folder in the **Navigation** pane) or a new one. If you specify a new group, AIM adds it as a folder in the **Navigation** pane.

Agency Version: Version of AIM the agency or attorney uses.

Contact Info: Name of the agency or attorney contact person, and the person's contact information. You can include internal (to your organization) and multiple email addresses, separated by semicolons. Typically, you only specify email addresses when the agency or attorney is using FTP for file delivery.

FTP

Username: User name for connecting to the FTP site.

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Password: Password for connecting to the FTP site.

Export Path: Location of the export files. Your organization either specified the FTP site in global settings, or selected the **Override Global FTP Settings** check box. AIM creates "Export" as a subfolder on the FTP site.

Import Path: Location of the import files. Your organization either specified the FTP site in global settings, or selected the **Override Global FTP Settings** check box. AIM creates "Import" as a subfolder on the FTP site.

Override Global FTP Settings: If selected, AIM doesn't store files for the agency or attorney on the FTP site indicated in global settings.

Passive Mode: If selected, AIM uses passive mode for FTP providers.

Type: FTP protocol to use for the specified **Server (URL)**. Valid values are:

> **FTP:** AIM transfers commands and data without encryption.

> **FTPS:** AIM transfers commands and data securely using SSL encryption.

> **SFTP:** AIM transfers commands and data securely in specially formatted packets using a single connection and an agreed-upon encryption cipher.

Server (URL): If the **Override Global FTP Settings** check box is selected, specify the FTP site to use.

Description: Description of the agency or attorney for internal use only.

Options

> **Default Commission Percentage:** Default commission percentage to use for accounts placed with an agency or attorney. You can override this amount in a distribution template when placing accounts using a business rule or when placing accounts manually.

> **Default Fee Schedule:** Default fee schedule to use for accounts placed with an agency or attorney that uses fee schedules. Users maintain fee schedules in Latitude.

> **Extend Placement if Payment is Received:** Number of days to extend account placement when AIM receives a payment notification while the agency or attorney holds the account. AIM adjusts pending and final recall dates based on this number for accounts that AIM recalls automatically.

> **Preferred File Format:** Agency's or attorney's preferred file format for export files. Valid values are:

>> **Delimited:** Columns are separated based on the delimiter character specified on the **Defaults** tab in the **Options** window.

>> **Fixed-length:** Columns are separated based on the field's starting position and the field length. Columns are padded with spaces for data that doesn't use the allotted field length.

>> **Excel:** Exports each record type to a separate worksheet. Column names must match exactly and cannot contain spaces. AIM doesn't allow underscore characters and sets all columns to the "General" format type.

XML: If the agency or attorney uses AIM Receiver, select this AIM-proprietary XML format. This file type doesn't require a trailer record.

YGC: You've Got Claims (YGC) standard layout. Typically, attorneys send one YGC-formatted file daily that contains all record types. For more information about the supported record types, see YGC Export File Layouts and YGC Import File Layouts.

> **Note:** AIM allows ASCII flat files to be fixed length or delimited with a comma, tab, or pipe delimiter.

Preferred Accounting Format: Agency's or attorney's preferred accounting format to use to determine how AIM calculates commissions.

Do Not Recall Bankruptcy Accounts: If selected, the agency or attorney works accounts that are in bankruptcy. If cleared, AIM recalls accounts automatically when it receives bankruptcy information.

Do Not Recall Deceased Accounts: If selected, the agency or attorney works deceased or probate accounts. If cleared, AIM recalls accounts automatically when it receives deceased information.

Do Not Recall Accounts Receiving Complaints: If selected, the agency or attorney works accounts with complaints. If cleared, AIM recalls accounts automatically when it receives complaint information.

Do Not Recall Accounts Receiving Disputes: If selected, the agency or attorney works accounts in dispute. If cleared, AIM recalls accounts automatically when it receives dispute information.

Use Payment Batching: If selected, the agency allows batch processing of payment transactions. If cleared, batch processing isn't allowed and AIM processes the payments individually.

Batch Size: Batch size to use when processing transactions. We recommend that you use a batch size of 50-200. If the agency allows batch processing and you don't specify a size, AIM defaults to a batch size of 50.

Attorney Information

Default Law List: Default law list to assign to the attorney. Users maintain law lists in Latitude.

PGP Information

Enable PGP Encryption: If selected, AIM uses the Pretty Good Privacy (PGP) program to encrypt export files sent to the agency or attorney, and decrypt import files received from the agency or attorney.

AIM Public Key: Public key file used locally for PGP encryption. Send this file to the agency or attorney to use to decrypt export files sent to them.

AIM Private Key: Private key file used locally for PGP encryption. You can only decrypt data that is encrypted with a public key with its corresponding private key. You can only decrypt data that is encrypted with a private key with its corresponding public key.

Agency/Attorney Public Key: Public key the agency or attorney provided for PGP encryption and decryption.

Passphrase for AIM Private Key: Passphrase to use to secure the AIM private key.

2. Complete the information.

3. To select a public or private key file, click the Search icon, click the file name, and then click **Open**.

4. Do the steps to Maintain a Close Status Code.

5. Do the steps to Specify Agency or Attorney Constraints.

6. In the menu bar, click **Save Agency/Attorney**. AIM adds the agency or attorney to the **Agencies/Attorneys** category in the **Navigation** pane.

Modify an Agency or Attorney

Use the **Agencies/Attorneys** pane to modify an outside agency or attorney.

To modify an agency or attorney

1. In the **Navigation** pane, click **Agencies/Attorneys** and then click the agency or attorney. The **Agencies/Attorneys** pane appears with the **General** tab selected.

General

ID: Internal code that Latitude assigns to identify the agency or attorney.

Alpha Code/YGC ID: External code used to identify the agency or attorney. AIM uses this code when creating folders and files for the agency or attorney.

Name: Name of the agency or attorney.

Tier: Number your company assigns to the agency that AIM uses for selection purposes in conditions and reports.

Group: Name of the group to assign to the agency or attorney. You can specify an existing group (shown as a folder in the **Navigation** pane) or a new one. If you specify a new group, AIM adds it as a folder in the **Navigation** pane.

Agency Version: Version of AIM the agency or attorney uses.

Contact Info: Name of the agency or attorney contact person, and the person's contact information. You can include internal (to your organization) and multiple email addresses, separated by semicolons. Typically, you only specify email addresses when the agency or attorney is using FTP for file delivery.

FTP

Username: User name for connecting to the FTP site.

Password: Password for connecting to the FTP site.

Export Path: Location of the export files. Your organization either specified the FTP site in global settings, or selected the **Override Global FTP Settings** check box. AIM creates "Export" as a subfolder on the FTP site.

Import Path: Location of the import files. Your organization either specified the FTP site in global settings, or selected the **Override Global FTP Settings** check box. AIM creates "Import" as a subfolder on the FTP site.

Override Global FTP Settings: If selected, AIM doesn't store files for the agency or attorney on the FTP site indicated in global settings.

Passive Mode: If selected, AIM uses passive mode for FTP providers.

Type: FTP protocol to use for the specified **Server (URL)**. Valid values are:

> **FTP:** AIM transfers commands and data without encryption.
>
> **FTPS:** AIM transfers commands and data securely using SSL encryption.
>
> **SFTP:** AIM transfers commands and data securely in specially formatted packets using a single connection and an agreed-upon encryption cipher.

Server (URL): If the **Override Global FTP Settings** check box is selected, specify the FTP site to use.

Description: Description of the agency or attorney for internal use only.

Options

Default Commission Percentage: Default commission percentage to use for accounts placed with an agency or attorney. You can override this amount in a distribution template when placing accounts using a business rule or when placing accounts manually.

Default Fee Schedule: Default fee schedule to use for accounts placed with an agency or attorney that uses fee schedules. Users maintain fee schedules in Latitude.

Extend Placement if Payment is Received: Number of days to extend account placement when AIM receives a payment notification while the agency or attorney holds the account. AIM adjusts pending and final recall dates based on this number for accounts that AIM recalls automatically.

Preferred File Format: Agency's or attorney's preferred file format for export files. Valid values are:

> **Delimited:** Columns are separated based on the delimiter character specified on the **Defaults** tab in the **Options** window.

> **Fixed-length:** Columns are separated based on the field's starting position and the field length. Columns are padded with spaces for data that doesn't use the allotted field length.

> **Excel:** Exports each record type to a separate worksheet. Column names must match exactly and cannot contain spaces. AIM doesn't allow underscore characters and sets all columns to the "General" format type.

> **XML:** If the agency or attorney uses AIM Receiver, select this AIM-proprietary XML format. This file type doesn't require a trailer record.

> **YGC:** You've Got Claims (YGC) standard layout. Typically, attorneys send one YGC-formatted file daily that contains all record types. For more information about the supported record types, see YGC Export File Layouts and YGC Import File Layouts.

Note: AIM allows ASCII flat files to be fixed length or delimited with a comma, tab, or pipe delimiter.

Preferred Accounting Format: Agency's or attorney's preferred accounting format to use to determine how AIM calculates commissions.

Do Not Recall Bankruptcy Accounts: If selected, the agency or attorney works accounts that are in bankruptcy. If cleared, AIM recalls accounts automatically when it receives bankruptcy information.

Do Not Recall Deceased Accounts: If selected, the agency or attorney works deceased or probate accounts. If cleared, AIM recalls accounts automatically when it receives deceased information.

Do Not Recall Accounts Receiving Complaints: If selected, the agency or attorney works accounts with complaints. If cleared, AIM recalls accounts automatically when it receives complaint information.

Do Not Recall Accounts Receiving Disputes: If selected, the agency or attorney works accounts in dispute. If cleared, AIM recalls accounts automatically when it receives dispute information.

Use Payment Batching: If selected, the agency allows batch processing of payment transactions. If cleared, batch processing isn't allowed and AIM processes the payments individually.

Batch Size: Batch size to use when processing transactions. We recommend that you use a batch size of 50-200. If the agency allows batch processing and you don't specify a size, AIM defaults to a batch size of 50.

Attorney Information

Default Law List: Default law list to assign to the attorney. Users maintain law lists in Latitude.

PGP Information

Enable PGP Encryption: If selected, AIM uses the Pretty Good Privacy (PGP) program to encrypt export files sent to the agency or attorney, and decrypt import files received from the agency or attorney.

AIM Public Key: Public key file used locally for PGP encryption. Send this file to the agency or attorney to use to decrypt export files sent to them.

AIM Private Key: Private key file used locally for PGP encryption. You can only decrypt data that is encrypted with a public key with its corresponding private key. You can only decrypt data that is encrypted with a private key with its corresponding public key.

Agency/Attorney Public Key: Public key the agency or attorney provided for PGP encryption and decryption.

Passphrase for AIM Private Key: Passphrase to use to secure the AIM private key.

2. Modify the information as necessary.

3. To modify close status codes, do the steps to Maintain a Close Status Code.

4. To modify agency constraints, do the steps to Specify Agency or Attorney Constraints.

5. In the menu bar, click **Save Agency/Attorney**.

Assign an Agency or Attorney to a Group

You can use the **General** tab in the **Agencies/Attorneys** pane to organize agencies and attorneys into groups. For example, an agency can have subdivisions that receive different types of accounts or different tiers (placement types). You can use groups to prevent an agency or attorney from receiving an account more than once. For more information, see Specify Default Global Settings.

To assign an agency or attorney to a group

1. In the **Navigation** pane, click **Agencies/Attorneys** and then click the agency or attorney. The **Agencies/Attorneys** pane appears with the **General** tab selected.

2. In the **Group** box, type the name of the group to assign to the agency or attorney.

    If the group exists (shows as a folder in the **Navigation** pane), AIM adds the agency or attorney name as a link within that group. If the group doesn't exist, AIM adds it as a folder in the **Navigation** pane and adds the agency or attorney name as a link within that group.

3. In the menu bar, click **Save Agency/Attorney**.

Maintain a Close Status Code

Use the **Close Status Codes** tab in the **Agencies/Attorneys** pane to maintain the close status codes that the agency can send. You can specify whether the receipt of a specific close status code changes the desk, status, and queue level assigned to the account in Latitude. Close status codes aren't applicable to attorneys.

To maintain a close status code

1. Do one of the following:

    - If you are creating a distribution template, do the steps to Add an Agency or Attorney.

    - If you are modifying a distribution template, do the steps to Modify an Agency or Attorney.

    The **Agencies/Attorneys** pane appears.

2. Click the **Close Status Codes** tab.
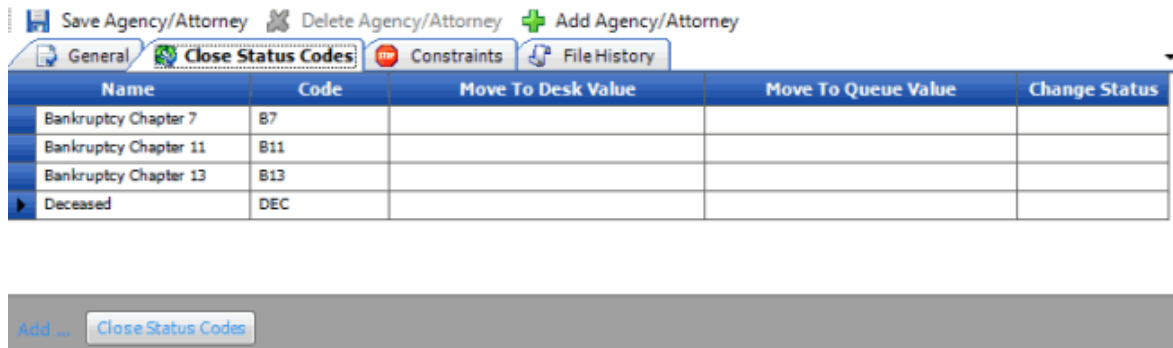
Name: Name of the close status code.

Code: Three-character code to use in the import file.

Move to Desk Value: Desk to move the account to when the agency assigns this close status code to the account.

Move to Queue Value: Queue to move the account to when the agency assigns this close status code to the account. Use this option to create a support queue item for an account that the agency reports as closed.

- Queue levels greater than 799 are not available; however, changing the account to a closed status sets the queue level to 998.

- Queue levels 600 - 699 create a clerical support queue item for the account.

- Queue levels 700 - 799 create a supervisor support queue item for the account.

- Clerical support or supervisor support queue levels add a support queue item to the account.

Change Status: Status to change the account to when the agency assigns this close status code to the account.

3. Complete the information and then, in the menu bar, click **Save Agency/Attorney**.

Specify Agency or Attorney Constraints

Use the **Constraints** tab in the **Agencies/Attorneys** pane to specify the constraints to use to limit the accounts that an agency or attorney can accept as a placement. For example, you can set a constraint for an agency that only accepts accounts from California. AIM uses these constraints with the Account Filter when placing accounts using business rules. If you generate a placement file manually, AIM doesn't apply constraints.

To specify agency or attorney constraints

1. Do one of the following:

- If you are adding an agency or attorney, do the steps to Add an Agency or Attorney.

- If you are modifying an agency or attorney, do the steps to Modify an Agency or Attorney.

The **Agencies/Attorneys** pane appears.

2. Click the **Constraints** tab.
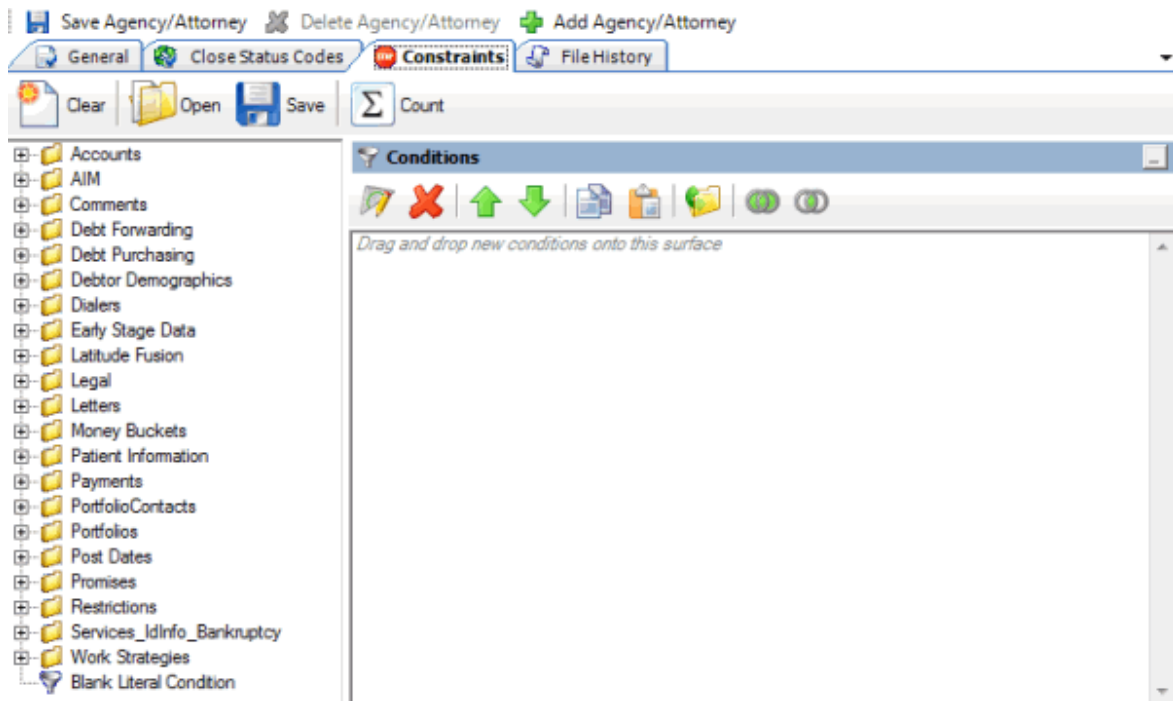
3. In the **Data Selection** pane, click the plus sign (**+**) next to a folder to expand it.
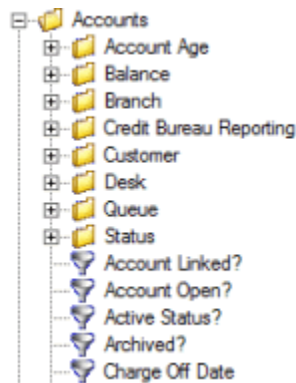
4. Click the data item for which to set a condition and drag and drop it in the **Conditions** pane. A dialog box appears, which allows you to specify the criteria. The title of the dialog box and the information displayed depend on the condition selected. For more information about setting conditions, see Query Condition Types.

   In the following example, the user dragged and dropped the **Current Balance** data item into the **Conditions** pane, causing the **Current Balance** dialog box to appear.
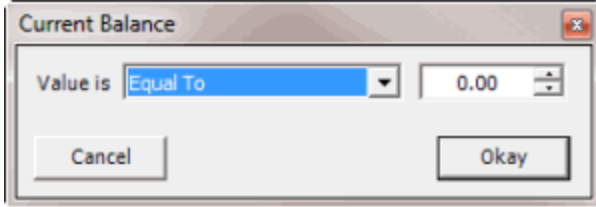
5. In the dialog box, specify the criteria and then click **Okay**. The condition appears in the **Conditions** pane. In the following example, the condition indicates you want to include in the query results accounts with a current balance that is greater than or equal to "$2,000."
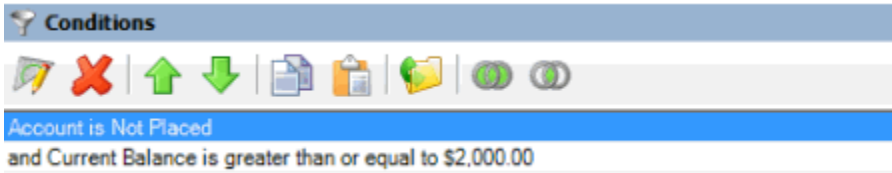
6. Drag and drop more data items as necessary and specify the criteria for each one. For more information about conditions, see Query Conditions.

7. To count the number of records that match the specified criteria, in the toolbar, click **Count**. The results appear in the **Query Designer** dialog box. Click **OK**.

8. To save the query, do the following:

   1. In the toolbar, click **Save**. The **Save Query Dialog** box appears.
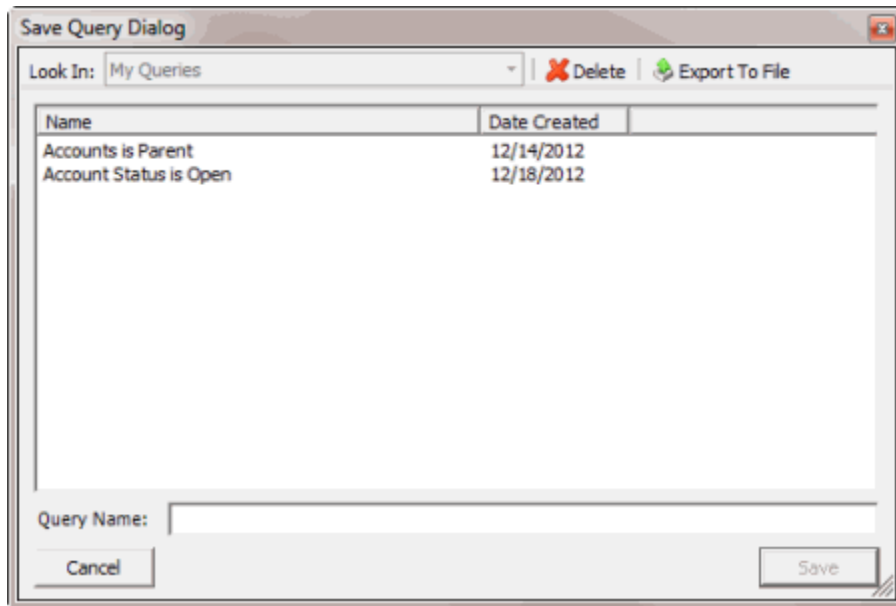
   b. In the **Query Name** box, type a name for the query and then click **Save**.

Tip: To overwrite an existing query, in the **Name** column, click the query to overwrite and then click **Save**.

9. To save the constraint, in the menu bar, click **Save Agency/Attorney**.

Delete an Agency or Attorney

Use the **Agencies/Attorneys** pane to delete an outside agency or attorney.

To delete an agency or attorney

1. In the **Navigation** pane, click **Agencies/Attorneys** and then click an agency or attorney. The **Agencies/Attorneys** pane appears with the **General** tab selected.

2. In the menu bar, click **Delete Agency/Attorney**. A confirmation dialog box appears.

3. Click **Yes**.

View File Processing History

Use the **File History** tab in the **Agencies/Attorneys** pane to view a list of files that AIM processed within a specified date range for the agency or attorney. You can use this information to troubleshoot issues that occurred when AIM processed the files.

To view file processing history

1. In the **Navigation** pane, click **Agencies/Attorneys** and then click an agency or attorney. The **Agencies/Attorneys** pane appears with the **General** tab selected.

2. Specify the date range to view and then click **Get History**. The data grid shows files that AIM processed during the specified date range.

3. To change the data grid view, see Report Options.

4. To view details for a file, do the following:

    1. In the data grid, click in the **FileName** cell for the file to view. A View icon appears.

    2. Click the View icon. The **Batch History Details** window appears.
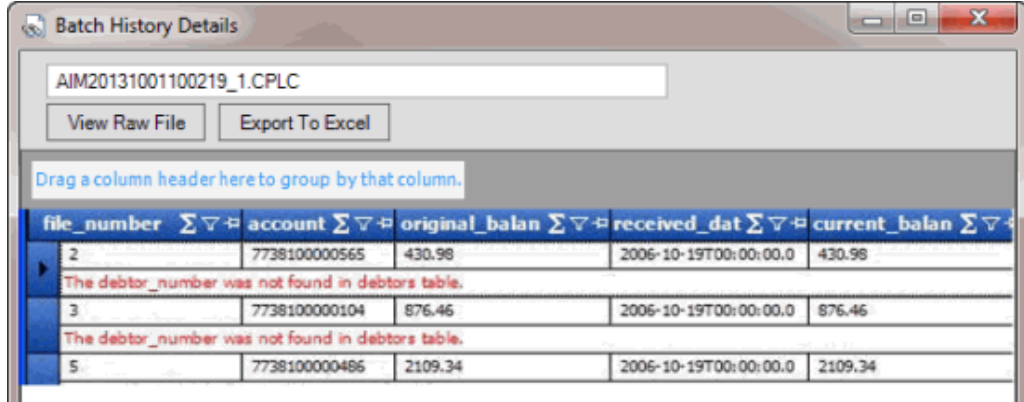
5. To view raw file data, click **View Raw File**. The data appears in your default text editor. Placement activities don't display in raw files.

6. To export the data to Microsoft Excel, click **Export to Excel**. The data appears in Microsoft Excel.

Account Filters

Account Filters

Use the **Account Filters** pane to create filters and associate queries to the filters. The queries allow you to define criteria for selecting accounts. You associate account filters and distribution templates to a business rule to distribute specific accounts to one or more agencies or attorneys. For more information, see Business Rules.

To open the Account Filters pane

In the **AIM** window, in the submenu bar, click **Add** and then click **Account Filter**. The **Account Filters** pane appears with the **Select Accounts** tab selected.
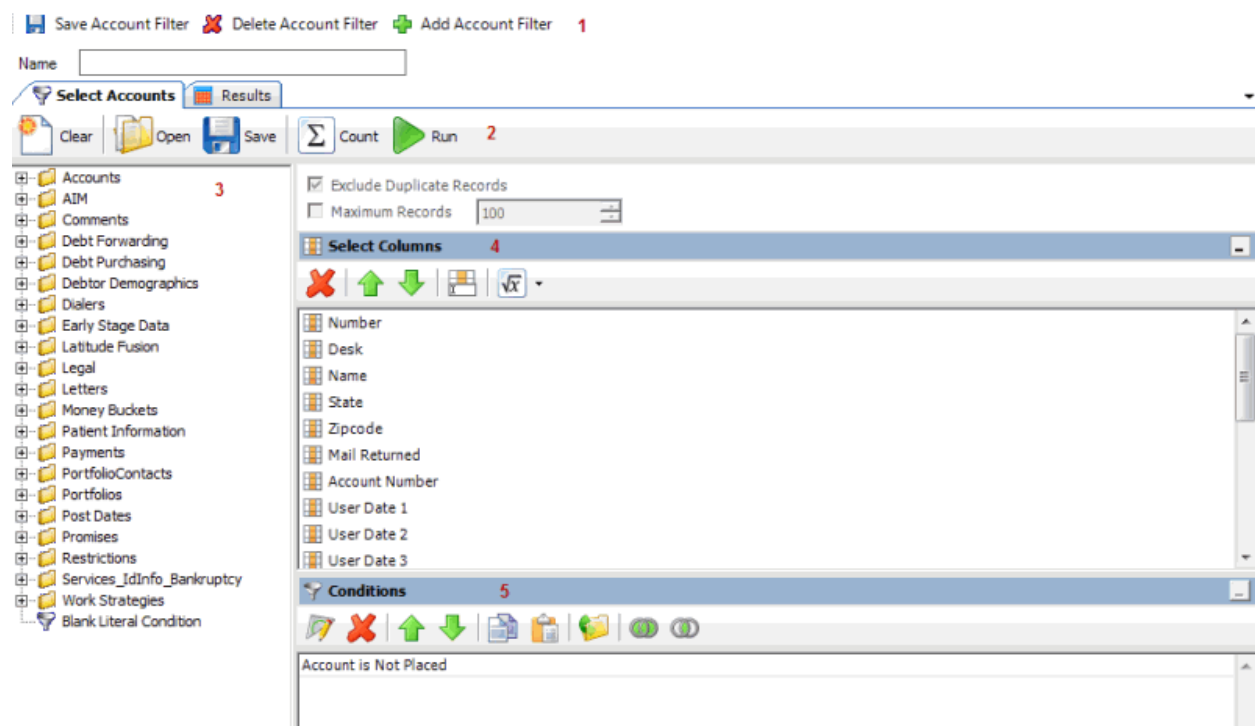
1. **Menu bar:** Displays options for maintaining account filters.

2. **Toolbar:** Displays available commands for account filters.

3. **Navigation pane:** Displays the navigation for account filters. To display information, click a category (for example, Accounts), expand one or more nodes, and then click an item.

4. **Select Columns pane:** Allows you to specify the data columns to include in the query results.

5. **Conditions pane:** Allows you to specify the criteria for including data in the query results.

Create a Filter

Use the **Account Filters** pane to create a filter. You can create a query for the filter or associate an existing query to the filter.

To create a filter

1. Do one of the following:

   o In the **AIM** window, in the submenu bar, click **Add** and then click **Account Filter**. The **Account Filters** pane appears with the **Select Accounts** tab selected.

   o If the **Account Filters** pane is open, in the menu bar, click **Add Account Filter**. AIM clears the data from the pane to allow you to create a filter.
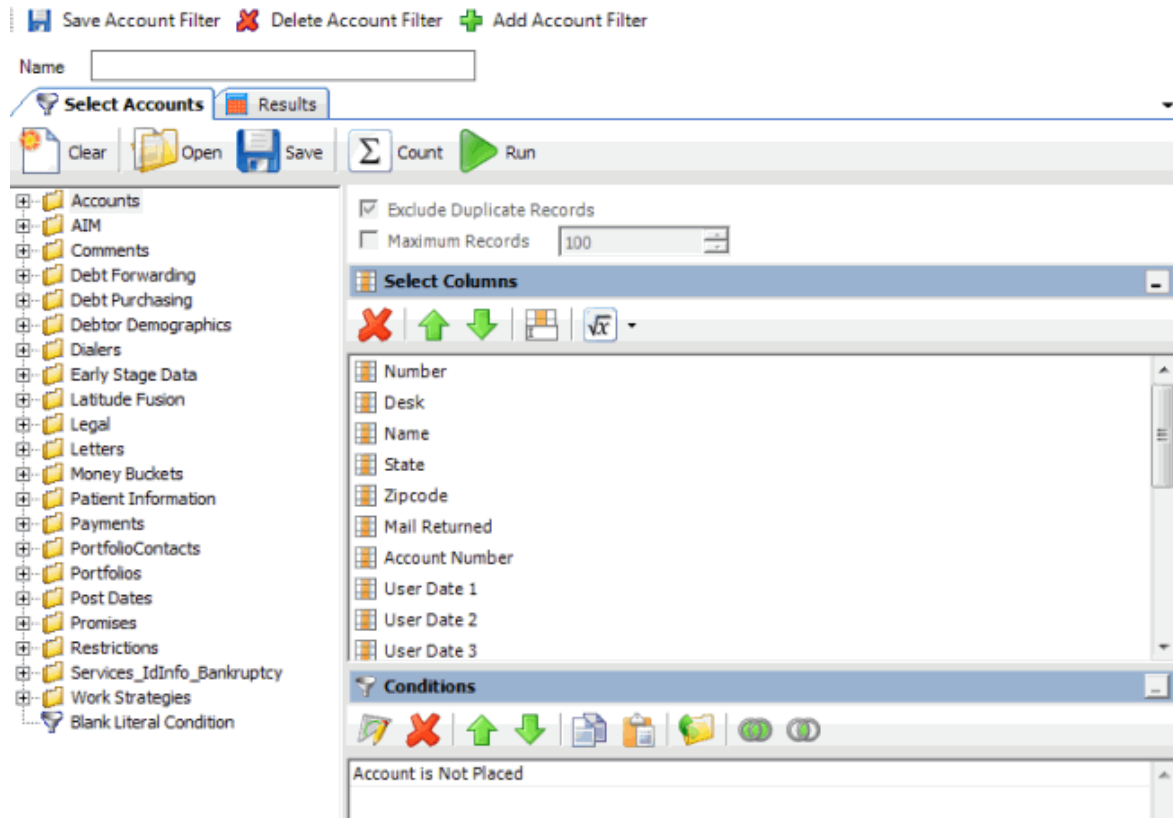
2. In the **Name** box, type a name for the filter.

3. In the **Select Columns** pane, add, modify, or delete columns as necessary. For more information, see Query Columns.

4. In the **Conditions** pane, add, modify, or delete conditions as necessary. For more information, see Query Conditions.

5. To count the number of records that match the specified criteria, in the toolbar, click **Count**. The results appear in the **Query Designer** dialog box. Click **OK**.

6. To view the accounts that match the specified criteria, in the toolbar, click **Run**. The query results appear on the **Results** tab. For more information about working with query results, see Query Results.

7. To save the query, do the following:

   1. In the toolbar, click **Save**. The **Save Query Dialog** box appears.

b. In the **Query Name** box, type a name for the query and then click **Save**.

> **Tip**: To overwrite an existing query, in the **Name** column, click the query to overwrite and then click **Save**.

8. To save the filter, in the menu bar, click **Save Account Filter**. AIM adds the account filter to the **Account Filters** category in the **Navigation** pane.

Modify a Filter

Use the **Account Filters** pane to modify a filter. You can modify the query associated to the filter or replace the query with an existing query.

To modify a filter

1. In the **Navigation** pane, click **Account Filters** and then click a filter name. The **Account Filters** pane appears with the **Select Accounts** tab selected.
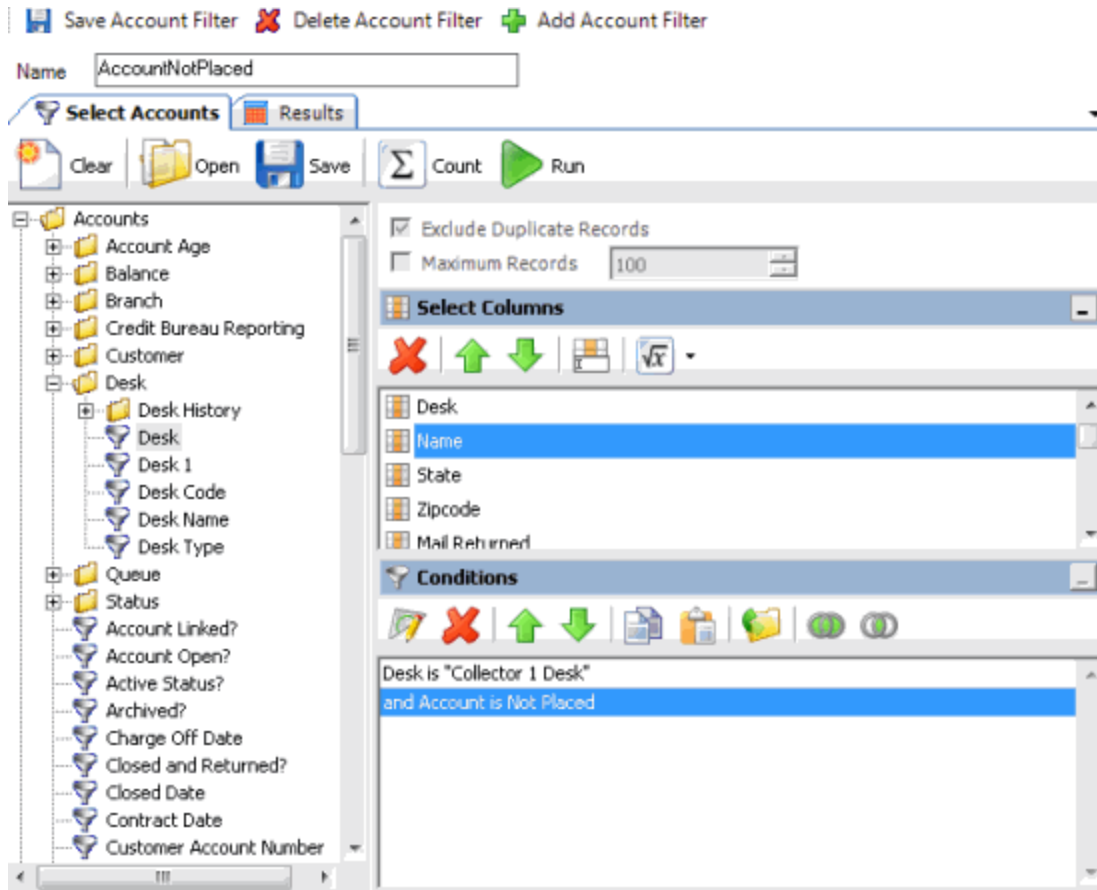
2. To rename the filter, in the **Name** box, type a new name.

3. In the **Select Columns** pane, add, modify, or delete columns as necessary. For more information, see Query Columns.

4. In the **Conditions** pane, add, modify, or delete conditions as necessary. For more information, see Query Conditions.

5. To count the number of records that match the specified criteria, in the toolbar, click **Count**. The results appear in the **Query Designer** dialog box. Click **OK**.

6. To view the accounts that match the specified criteria, in the toolbar, click **Run**. The query results appear on the **Results** tab. For more information about working with query results, see Query Results.

7. To save the query, do the following:

    1. In the toolbar, click **Save**. The **Save Query Dialog** box appears.

b. In the **Query Name** box, type a name for the query and then click **Save**.

> **Tip**: To overwrite an existing query, in the **Name** column, click the query to overwrite and then click **Save**.

8. To save your changes, in the menu bar, click **Save Account Filter**.

Delete a Filter

Use the **Account Filters** pane to delete a filter. If you associated a filter to a business rule, you cannot delete the filter until you disassociate it from the business rule.

To delete a filter

1. In the **Navigation** pane, click **Account Filters** and then click a filter name. The **Account Filters** pane appears with the **Select Accounts** tab selected.
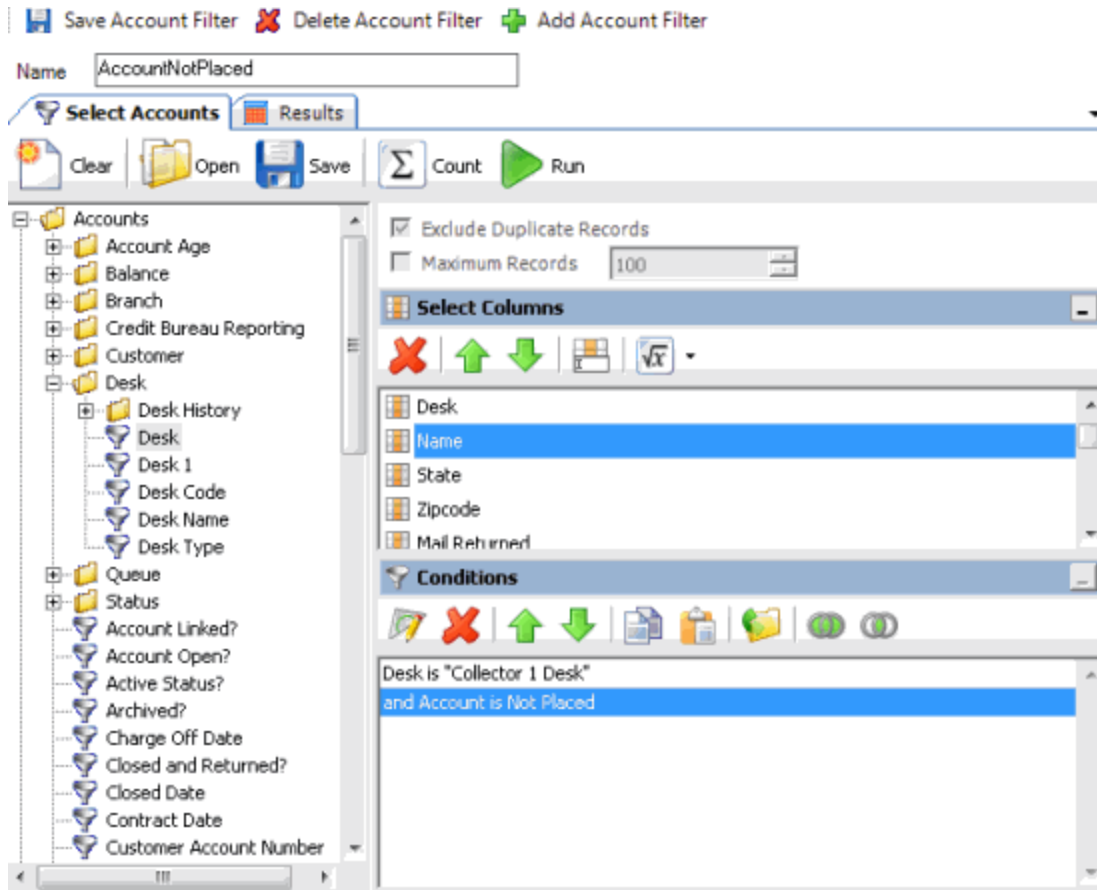
2. In the menu bar, click **Delete Account Filter**. A confirmation dialog box appears.

3. Click **Yes**. AIM deletes the account filter from the **Account Filters** category in the **Navigation** pane.
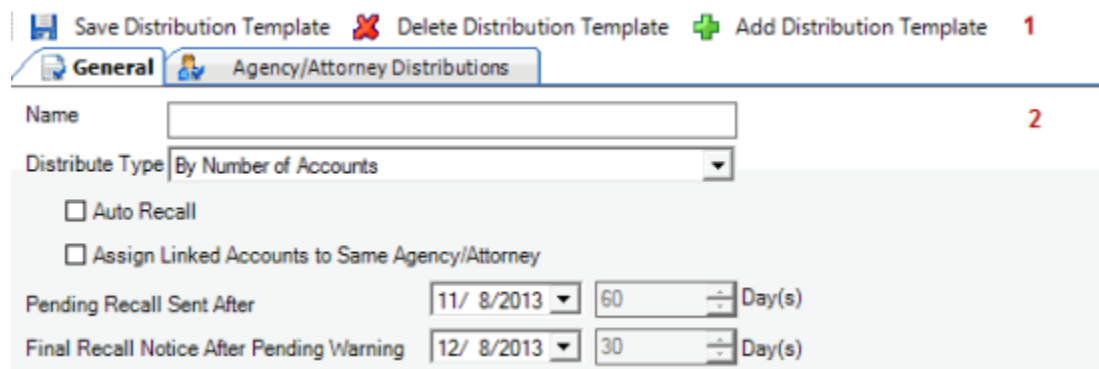
Distribution Templates

Distribution Templates

Use the **Distribution Templates** pane to create distribution templates and specify the agencies and attorneys to receive accounts. The templates allow you to define how AIM distributes accounts for placement with outside agencies or attorneys. You associate agencies and attorneys to a distribution template. You then associate distribution templates and account filters to a business rule to distribute specific accounts to one or more agencies or attorneys. For more information, see Business Rules.

To open the Distribution Templates pane

In the **AIM** window, in the submenu bar, click **Add** and then click **Distribution Template**. The **Distribution Templates** pane appears with the **General** tab selected.

1. **Menu bar:** Displays options for maintaining distribution templates.

2. **Information pane:** Displays the tabs for maintaining distribution templates.

Create a Distribution Template

Use the **General** tab in the **Distribution Templates** pane to create a distribution template, which includes the agencies and attorneys to receive accounts. Only agencies and attorneys that your organization set up in AIM are available. For more information about adding an agency or attorney to AIM, see Add an Agency or Attorney.

To create a distribution template

1. Do one of the following:

   o In the **AIM** window, in the submenu bar, click **Add** and then click **Distribution Template**. The **Distribution Templates** pane appears with the **General** tab selected.

   o If the **Distribution Template** pane is open, in the menu bar, click **Add Distribution Template**. AIM clears the data from the pane to allow you to add a distribution template.

Name: Name of the distribution template.

Distribution Type: Type of distribution, which indicates how AIM disburses the accounts.

Auto Recall: If selected, the system flags pending and final recalls on accounts, based on the dates specified. If not selected, select the accounts to generate a recall file manually. AIM generates automatic recalls when it exports recalls for accounts that are due for recall. For more information, see Issue a Pending Recall of Accounts and Issue a Final Recall of Accounts.

Assign Linked Accounts to Same Agency/Attorney: If selected, AIM places linked accounts that you haven't placed with an outside agency or attorney with the same agency or attorney as other accounts in the linked accounts group.

Pending Recall Sent After: Number of days after account placement to wait to set the pending recall flag.

Final Recall Notice After Pending Warning: Number of days after AIM sets the pending recall flag to wait to set the final recall flag.

2. Complete the information.

3. Do the steps to Specify an Agency or Attorney to Receive Accounts.

4. In the menu bar, click **Save Distribution Template**. AIM adds the distribution template to the **Distribution Templates** category in the **Navigation** pane.

Specify an Agency or Attorney to Receive Accounts

Use the **Agency/Attorney Distributions** tab in the **Distribution Templates** pane to specify an agency or attorney to receive accounts using a distribution template. You also specify the percentage of accounts to place with the agency or attorney and the commissions the agency or attorney is to receive.

To specify an agency or attorney to receive accounts

1. Do one of the following:

   o If you are creating a distribution template, do the steps to Create a Distribution Template.

   o If you are modifying a distribution template, do the steps to Modify a Distribution Template.

2. Click the **Agency/Attorney Distributions** tab.

Agency/Attorney Name: Name of the agency or attorney to associate to the distribution template. Only agencies and attorneys that your organization set up in AIM are available. For more information about adding an agency or attorney to AIM, see Add an Agency or Attorney.

Placed Desk: Desk to move accounts to when AIM places them using this distribution template. Only desks that exist in Latitude are available in the list box.

Recall Desk: Desk to move accounts to when AIM recalls them automatically using this distribution template. Only desks that exist in Latitude are available in the list box. If you recall accounts manually, specify a desk at that time.

Distribution Percentage: Percent of the placements (accounts or total dollars) the agency or attorney receives. AIM sets the first agency or attorney added to "100" and sets subsequent agencies to "0" by default. You can adjust the percentages as necessary. The total percentages for this distribution template must equal 100.

Commission Percentage: Percent commission the agency or attorney receives. You can modify the percentage as necessary.

Fee Schedule: Fee schedule to use to determine the commission the agency or attorney receives. Only fee schedules that exist in Latitude are available in the list box. This fee schedule overrides the existing fee schedule on the account and assigns the commissions to the forwarded agency or attorney. When AIM recalls accounts, it reassigns the customer's default fee schedule to the account.

Note: Specify a commission percentage or a fee schedule, not both.

3. In the lower portion of the window, click **Agency/Attorney**. A blank row appears in the data grid.

4. Complete the information.

5. Add more agencies or attorney as necessary and then, in the menu bar, click **Save Distribution Template**.

Modify a Distribution Template

Use the **Distribution Templates** pane to modify a distribution template.

To modify a distribution template

1. In the **Navigation** pane, click **Distribution Templates** and then click a distribution template name. The **Distribution Templates** pane appears with the **General** tab selected.

Name: Name of the distribution template.

Distribution Type: Type of distribution, which indicates how AIM disburses the accounts.

Auto Recall: If selected, the system flags pending and final recalls on accounts, based on the dates specified. If not selected, select the accounts to generate a recall file manually. AIM generates automatic recalls when it exports recalls for accounts that are due for recall. For more information, see Issue a Pending Recall of Accounts and Issue a Final Recall of Accounts.

Assign Linked Accounts to Same Agency/Attorney: If selected, AIM places linked accounts that you haven't placed with an outside agency or attorney with the same agency or attorney as other accounts in the linked accounts group.

Pending Recall Sent After: Number of days after account placement to wait to set the pending recall flag.

Final Recall Notice After Pending Warning: Number of days after AIM sets the pending recall flag to wait to set the final recall flag.

2. Modify the information as necessary.

3. To modify the agencies or attorneys to receive the accounts, do the steps to Specify an Agency or Attorney to Receive Accounts.

4. In the menu bar, click **Save Distribution Template**.

Delete a Distribution Template

Use the **Distribution Templates** pane to delete a distribution template. If you assigned a distribution template to a business rule, you cannot delete the distribution template until you delete it from the business rule.

To delete a distribution template

1. In the **Navigation** pane, click **Distribution Templates** and then click a distribution template name. The **Distribution Templates** pane appears with the **General** tab selected.

2. In the menu bar, click **Delete Distribution Template**. A confirmation dialog box appears.

3. Click **Yes**.

Business Rules

Business Rules

Use the **Business Rules** pane to create placement files to send to outside agencies or attorneys. Business rules respect agency constraints. You can reuse business rules to place new accounts or to place recalled accounts with another agency or attorney. You associate a distribution template and an account filter to a business rule to distribute accounts to one or more agencies or attorneys. For more information, see Account Filters and Distribution Templates.

To open the Business Rules pane

In the **AIM** window, in the submenu bar, click **Add** and then click **Business Rules**. The **Business Rules** pane appears with the **General** tab selected.
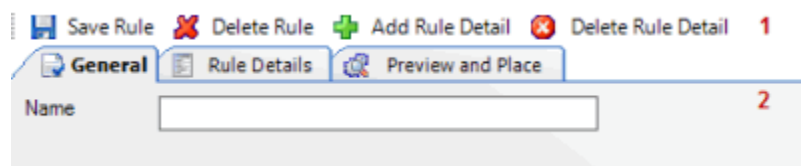
1. **Menu bar:** Displays options for maintaining business rules.

2. **Information pane:** Displays the tabs for maintaining business rules.

Account Distribution

You can distribute accounts using the following methods:

- To distribute accounts to a single agency or attorney using a new or existing query, do the steps to Create a Placement File.

- To distribute accounts to multiple agencies and attorneys using a business rule, do the steps to Create a Placement File Using Business Rules.

- To distribute accounts for placement requests that users generated in Latitude, do the steps to Export Data to a File, selecting **Placement Files (CPLC)** as the file type.

Create a Business Rule

Use the **Business Rules** pane to create a business rule.

To create a business rule

1. Do one of the following:

   o In the **AIM** window, in the submenu bar, click **Add** and then click **Business Rule**. The **Business Rules** pane appears with the **General** tab selected.

   o If the **Business Rules** pane is open, in the menu bar, click **Add Business Rule**. AIM clears the data from the pane to allow you to add a business rule.
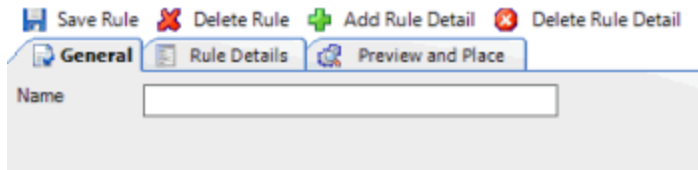
2. In the **Name** box, type a name for the business rule.

3. Do the steps to Add Business Rule Details.

4. In the menu bar, click **Save Rule**. AIM adds the business rule to the **Business Rules** category in the **Navigation** pane.

Add Business Rule Details

Use the **Rule Details** tab in the **Business Rules** pane to associate an account filter and distribution template to a business rule. You can add multiple rule details to associate multiple account filters and distribution templates to a business rule. If more than one account filter includes the same account, AIM distributes the account using the first filter listed in the business rule details.

To add business rule details

1. Do one of the following:

   - If you are creating a business rule, do the steps to Create a Business Rule.

   - If you are modifying a business rule, do the steps to Modify a Business Rule.

2. Click the **Rule Details** tab.

3. In the menu bar, click **Add Rule Detail**. The **Rule Detail Name** dialog box appears.

4. In the **Rule Detail Name** box, type a name for the rule detail and then click **OK**. A tab with the specified name appears on the **Rule Details** tab.
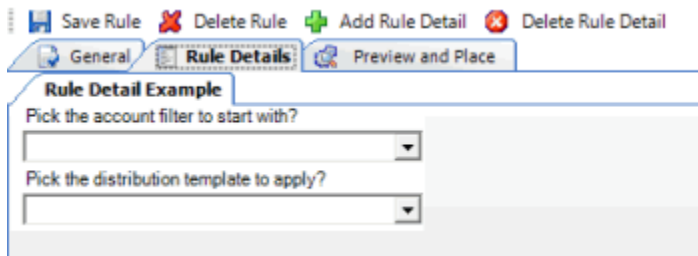
5. Click the account filter to associate to the business rule.

6. Click the distribution template to associate to the business rule.

7. In the menu bar, click **Save Rule**.

Modify a Business Rule

Use the **Business Rules** pane to modify a business rule.

To modify a business rule

1. In the **Navigation** pane, click **Business Rules** and then click a business rule name. The **Business Rules** pane appears with the **General** tab selected.
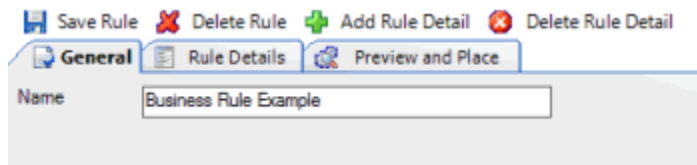
   Name: Name of the business rule.

2. Modify the information as necessary.

3. To modify the business rule details, do the steps to Modify Business Rule Details.

4. In the menu bar, click **Save Rule**.

Modify Business Rule Details

Use the **Rule Details** tab in the **Business Rules** pane to modify the account filter or distribution template associated to a business rule.

To modify business rule details

1. In the **Navigation** pane, click **Business Rules** and then click a business rule name. The **Business Rules** pane appears with the **General** tab selected.

2. Click the **Rule Details** tab.

3. Click the rule details tab to modify.
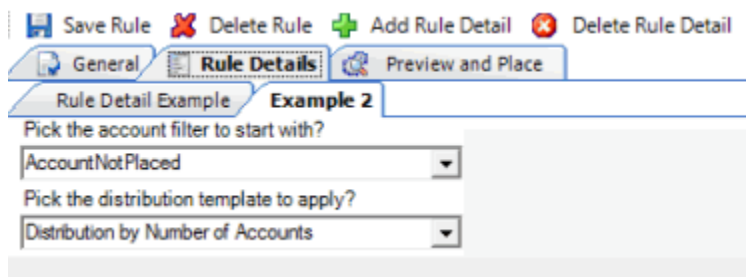
4. Modify the information as necessary.

5. In the menu bar, click **Save Rule**.

Delete a Business Rule

Use the **Business Rules** pane to delete a business rule.

To delete a business rule

1. In the **Navigation** pane, click **Business Rules** and then click a business rule name. The **Business Rules** pane appears with the **General** tab selected.
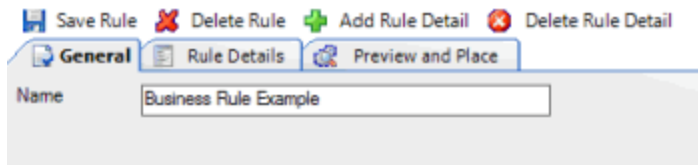
2. In the menu bar, click **Delete Rule**. A confirmation dialog box appears.

3. Click **Yes**.

Delete Business Rule Details

Use the **Business Rules** pane to delete business rule details.

To delete business rule details

1. In the **Navigation** pane, click **Business Rules** and then click a business rule name. The **Business Rules** pane appears with the **General** tab selected.

2. Click the **Rule Details** tab.
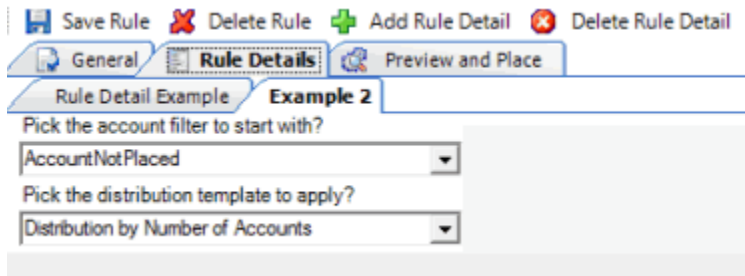
3. Click the tab for the rule details to delete.

4. In the menu bar, click **Delete Rule Detail**. A confirmation dialog box appears.

5. Click **Yes**.

Preview and Place Accounts

Preview and Place Accounts

Use the **Preview and Place** tab in the **Business Rules** pane to preview account placements, generate a placement report, and create files to place accounts with agencies and attorneys.

Preview Account Placements

Use the **Preview and Place** tab in the **Business Rules** pane to preview expected account placements based on the business rule.

To preview account placements

1. With a business rule open, click the **Preview and Place** tab.

2. Click **Preview**. A tab appears for each rule detail for this business rule. Within the rule details tab, a tab appears for each agency and attorney associated to the distribution template for this business rule.

Count: Number of accounts to place with the agencies or attorneys.

Balance: Total balance of all the accounts to place with the agencies or attorneys.

3. Click a rule detail tab to view its agencies and attorneys.

4. Click an agency or attorney tab to view the accounts to place with that agency or attorney.

5. To print the data grid, do the following:

    1. Click **Print Grid**. The **Print preview** window appears.

    2. In the toolbar, click the **Print** icon.

6. To modify the columns that display, do the following:

    1. Click **Modify Columns**. The **Modify Display Columns** dialog box appears.

    2. Select the check boxes for the columns to display.

    3. Clear the check boxes for the columns to hide.

7. To change the data grid view, see Preview Options.

8. To generate a report, do the steps to Generate an Account Placement Report.

9. To place the accounts with the agencies and attorneys, do the steps to Create a Placement File Using Business Rules.

Generate an Account Placement Report

Use the **Preview and Place** tab in the **Business Rules** pane to see an overview of all expected placements.

To generate an account placement report

1. With a business rule open, click the **Preview and Place** tab.

2. Click **Preview**. A tab appears for each rule detail for this business rule. Within the rule details tab, a tab appears for each agency and attorney associated to the distribution template for this business rule.
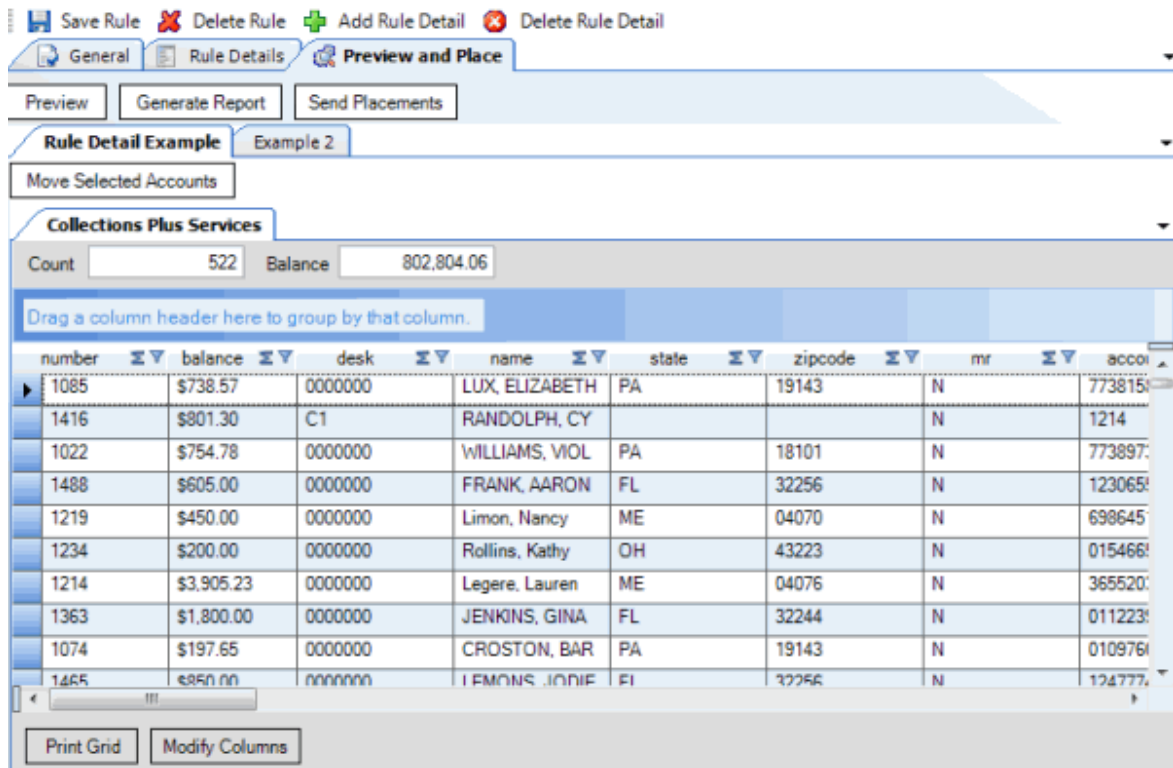
3. Click **Generate Report**. The **Placement Report Viewer** window appears.

4. To change the data grid view, see Preview Options.

Create a Placement File Using Business Rules

Use the **Preview and Place** tab in the **Business Rules** pane to create files to place accounts with agencies and attorneys. AIM creates a file for each agency or attorney.

To create a placement file using business rules

1. With a business rule open, click the **Preview and Place** tab.

2. Click **Preview**. A tab appears for each rule detail for this business rule. Within the rule details tab, a tab appears for each agency and attorney associated to the distribution template for this business rule.

3. Click a rule detail tab.

4. Click the agency or attorney tab that contains the accounts to move.

5. To move specific accounts to another agency or attorney before placing the accounts, do the following:

Note: The move is for this placement only and does not affect the distribution template.

   1. In the data grid, click the row for the account to move.

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

   b. Click **Move Selected Accounts**. The **Which Agency/Attorney?** dialog box appears.

   c. In the list box, click the agency or attorney to which to move the accounts.

   d. To change the desk after AIM places the accounts, in the list box, click the desk.

   e. To change the desk after AIM recalls the accounts, in the list box, click the desk.

   f. Click **OK**.

6. Click **Send Placements**. The **Execution Window** appears.
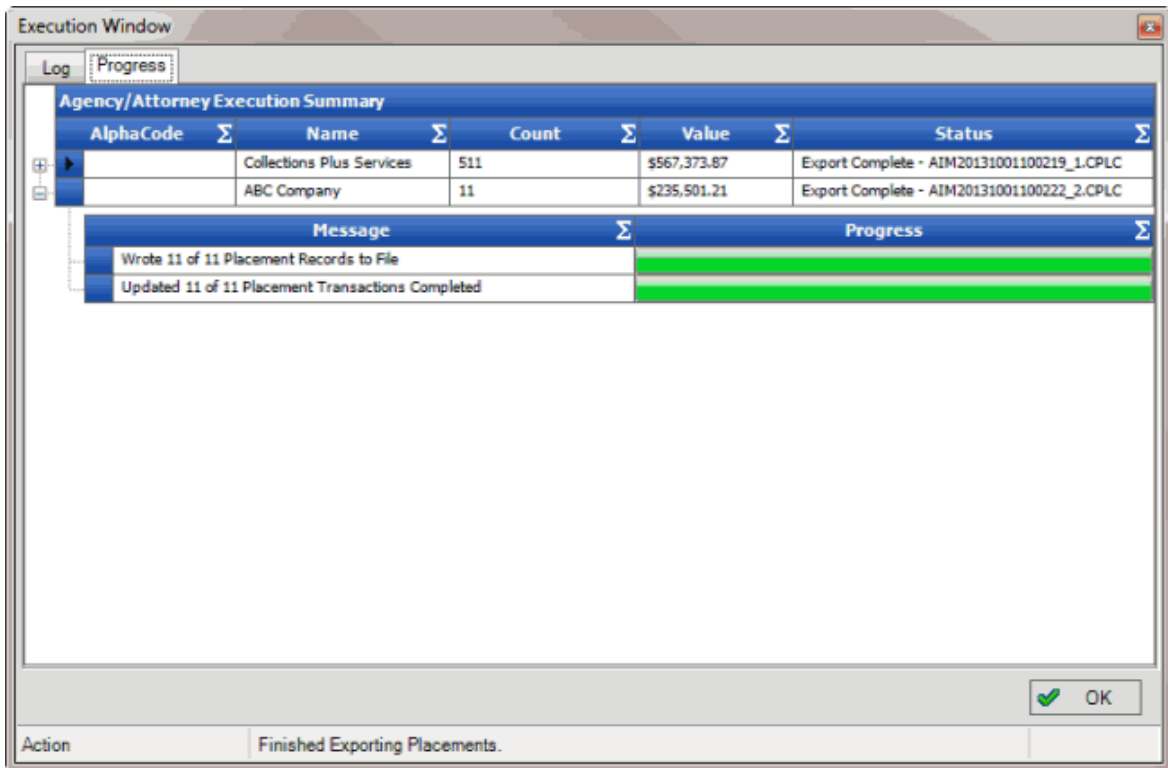
AIM saves the placement files to the folder specified in global settings. If your organization configured FTP in global settings, AIM saves each agency's and attorney's file to their folder on the FTP site. If your organization configured email messaging in global settings, AIM sends an email message to the agencies and attorneys, notifying them that a placement file is available. For more information, see Specify General Global Settings.

7. To see the log information, click the **Log** tab.

8. When finished viewing the account placement results, click **OK**.

Preview Options

Preview Options

Preview options allow you to change the view for data grids. The following options are available when viewing certain data grids:

- Arrange column headings.

- Sort the data.

- Group the data.

- Summarize the data.

- Filter the data.

- Set custom filter criteria.

Arrange Column Headings in a Data Grid

Use the **Preview and Place** tab in the **Business Rules** pane to change the order of the columns in a data grid.

To arrange column headings in a data grid

1. Do the steps to Preview Account Placements. The **Preview and Place** tab in the **Business Rules** pane appears.

2. Click a column heading and drag it to the new location.

3. When two red arrows appear in the location where you want to place the column, release your mouse.

Sort Data in a Data Grid

Use the **Preview and Place** tab in the **Business Rules** pane to sort the data in a data grid.

To sort data in a data grid

1. Do the steps to Preview Account Placements. The **Preview and Place** tab in the **Business Rules** pane appears.

2. Click a column heading. An arrow that points upward appears next to the column heading to indicate that AIM sorted the column in ascending order.

3. To sort the column in descending order, click the column heading again. The arrow points downward to indicate that AIM sorted the column in descending order.

Group Data in a Data Grid

Use the **Preview and Place** tab in the **Business Rules** pane to group data in a data grid.

To group data in a data grid

1. Do the steps to Preview Account Placements. The **Preview and Place** tab in the **Business Rules** pane appears.

2. Click a column heading, drag it into the space above the column headings, and drop it. AIM groups the accounts on the specified column.

3. To view the accounts in a group, click the plus sign (+) next to the group to expand it. The following example shows the data grouped by tier.

4. To add a group within a group, expand a group, click a column heading, drag it into the space above the column headings, and drop it. The following example shows the data grouped by tier and name.

5. AIM sorts groups in ascending order by default. To change the sort for a group, click the group heading.

6. To delete a group, click the group heading and drag and drop it back into the query results space.

Summarize Data in a Data Grid

Use the **Preview and Place** tab in the **Business Rules** pane to summarize data in a data grid.

To summarize data in a data grid

1. Do the steps to Preview Account Placements. The **Preview and Place** tab in the **Business Rules** pane appears.

2. In the column heading, click the Sigma icon. The **Select Summaries** dialog box appears. The options available are based on the item's data type.

3. Select the calculations to perform on the data and then click **OK**. The result appears in the last row of the data grid. If you grouped the data, AIM calculates the data for each group and displays the results in the last row for each group.

Filter Data in a Data Grid

Use the **Preview and Place** tab in the **Business Rules** pane to filter data in a data grid.

To filter data in a data grid

1. Do the steps to Preview Account Placements. The **Preview and Place** tab in the **Business Rules** pane appears.

2. In the column to filter, click the Funnel icon. A list of options for the specified column appears.

(All): If selected, AIM didn't filter the data.

(Custom): If selected, allows you to set custom filtering conditions.

(Blanks): If selected, AIM limits the data to accounts with a blank or null value in the specified column.

(NonBlanks): If selected, AIM limits the data to accounts that don't have a blank or null value in the specified column.

3. Click any value other than **(Custom)**. The list closes and the data is limited to the records that match the specified filter.

4. To set custom filter criteria, do the steps to Set Custom Filter Criteria for a Data Grid.

Set Custom Filter Criteria for a Data Grid

Use the **Preview and Place** tab in the **Business Rules** pane to customize selection criteria for any column in a data grid.

To set custom filter criteria for a data grid

1. Do the steps to Preview Account Placements. The **Preview and Place** tab in the **Business Rules** pane appears.

2. In the column heading of the column to filter, click the Funnel icon. A list of options for the specified column appears.

3. Click **(Custom)**. The **Enter Filter Criteria for...** dialog box appears.

4. In the **Operand** list box, click an operator. For more information, see Custom Filter Operations.

5. In the **Operand** list box, click or type an operand. In the following example, the operator is "= Equals" and the operand is "Collections Plus Services." The condition appears in the lower portion of the dialog box. For example, "[Name] = "Collections Plus Services."

6. To add a condition, click **Add a condition**. AIM adds a blank operator and operand. Complete the information.

7. To delete a condition, click the condition and then click **Delete Condition**.

8. If you set multiple conditions, do one of the following:

o   To set the filter so that all the conditions have to be true for an account to appear in the results, click **And conditions**. For example, customer does not equal "0000001 - CUSTOMER ONE" and customer does not equal "0000002 - CUSTOMER TWO" means that you want to see accounts for all customers except Customer One and Customer Two.

o   To set the filter so that only one condition has to be true for an account to appear in the results, click **Or conditions**. For example, customer equals "0000001 - CUSTOMER ONE" or customer equals "0000002 - CUSTOMER TWO" means that you only want to see accounts for Customer One or Customer Two.

9.   When finished, click **OK**.

Custom Filter Operations

The following table describes the operators that are available when setting custom filter criteria for query results, reports, or when previewing account placements. The operators available for a data item are based on the item's data type.

Operator	Description
Equals	Retrieves accounts where the data matches the specified value.
Does not equal	Retrieves accounts where the data does not match the specified value.
Less than	Retrieves accounts where the data is less than the specified value. This operator is for date and numeric data types only.
Less than or equal To	Retrieves accounts where the data is less than or equal to the specified value. This operator is for date and numeric data types only.
Greater than	Retrieves accounts where the data is greater than the specified value. This operator is for date and numeric data types only.
Greater than or equal To	Retrieves accounts where the data is greater than the specified value. This operator is for date and numeric data types only.
Like	Retrieves accounts where data matches the specified pattern. This operator is for alphanumeric data types only.
Matches Regular Expression	Retrieves accounts where the system stores data in the specified format. This operator is for alphanumeric data types only. ^[A-Z] finds all values in uppercase character format only. ^[a-z] finds all values in lowercase character format only.

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	^[0-9] finds all values in numeric format only.
	^[A-Za-z] finds all values in mixed case character format.
	^[A-Za-z] finds all values in mixed case character format.
	^[^0-9]+$ finds all values with a numeric format and dollar sign.
	^[A-Za-z0-9] [A-Za-z0-9_]*$ finds all values of mixed case and currency.
Starts with	Retrieves accounts where data starts with the specified character or characters. This operator is for alphanumeric data types only.
Contains	Retrieves accounts where data contains the specified character or characters. This operator is for alphanumeric data types only.
Ends with	Retrieves accounts where data ends with the specified character or characters. This operator is for alphanumeric data types only.
Does not start with	Retrieves accounts where data does not start with the specified character or characters. This operator is for alphanumeric data types only.
Does not contain	Retrieves accounts where data does not contain the specified character or characters. This operator is for alphanumeric data types only.
Does not end with	Retrieves accounts where data does not end with the specified character or characters. This operator is for alphanumeric data types only.
Does not match	Retrieves accounts where data does not match the specified character or characters. This operator is for alphanumeric data types only.
Not like	Retrieves accounts where data is not like the specified pattern. This operator is for alphanumeric data types only.

Update Forwarded Fees

Use the **Update Forwarded Fees** window to update the commission percentage or fee schedule for accounts that agencies or attorneys hold. This change only applies to payments received after you changed the rate. Payments received before you changed the rate use the original rate.

To update forwarded fees

1. In the menu bar, click **Tools** and then click **Update Forwarded Fees**. The **Update Forwarded Fees** window appears.
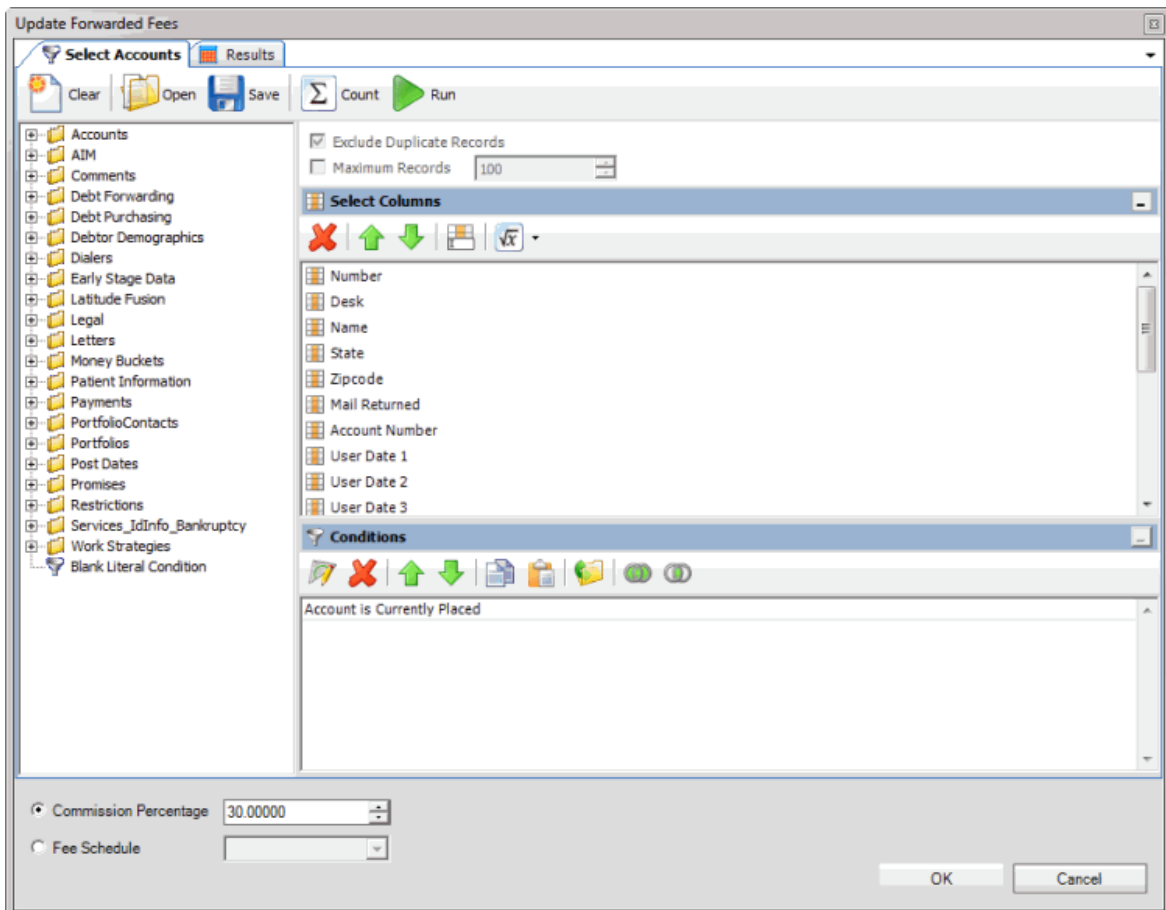
2. In the **Select Columns** pane, add, modify, or delete columns as necessary. For more information, see Query Columns.

3. In the **Conditions** pane, add, modify, or delete conditions as necessary. For more information, see Query Conditions.

4. To count the number of records that match the specified criteria, in the toolbar, click **Count**. The results appear in the **Query Designer** dialog box. Click **OK**.

5. To view the accounts that match the specified criteria, in the toolbar, click **Run**. The query results appear on the **Results** tab. For more information about working with query results, see Query Results.

6. To export the results to Microsoft Excel, on the **Results** tab, do the following:

1. Click **Export to Excel**. The **Save As** dialog box appears.

2. In the **File name** box, type a name for the file and then click **Save**.

7. Do one of the following:

- To use a commission percentage for the agency fees, select **Commission Percentage** and, in the box, type the percent to use to calculate the fees.

- To use a fee schedule for the agency fees, select **Fee Schedule** and, in the list box, click the fee schedule to use to calculate the fees.

8. To save the query, do the following:

1. In the toolbar, click **Save**. The **Save Query Dialog** box appears.
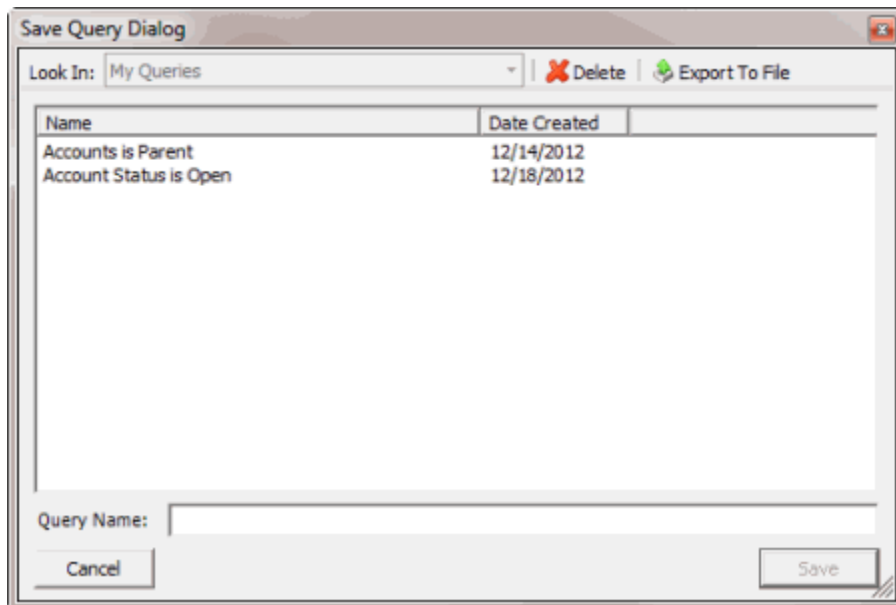
b. In the **Query Name** box, type a name for the query and then click **Save**.

> **Tip**: To overwrite an existing query, in the **Name** column, click the query to overwrite and then click **Save**.

9. In the **Update Forwarded Fees** window, click **OK**. AIM applies the new rate to payments received from the agency for these accounts (from this point forward).

Account Placements and Recalls

Use the placement and recall features to create account placements, pending recalls, and final recalls for a single agency or attorney. If you assign a fee schedule to an account when creating a placement, AIM overwrites the account's current fee schedule for each payment credited to the outside agency or attorney. Once AIM recalls the placed accounts, AIM resets the account's fee schedule to the customer's default fee schedule.

- **Flat agency commission:** The Payhistory.AIMAgencyFee field for the transaction contains the commission percent times the payment.

- **Fee schedule:** The Payhistory.AIMAgencyFee field for the transaction contains the sum of the amounts in **Fee1** through **Fee10**.

To create account placements or recalls for multiple agencies and attorneys, export data to a placement or recall file. For more information, see Export Data to a File.

Flag Accounts for Placement

Use the **Flag Accounts** window to flag accounts for easy selection when creating placement files. You can flag Microsoft Excel spreadsheets that contain a list of accounts that match accounts in Latitude.

To flag accounts for placement

1. Create an Excel spreadsheet with a column that contains either the Latitude file number or the customer's account number in each row.

2. In the menu bar, click **Tools** and then click **Mark Accounts**. The **Flag Accounts** window appears.
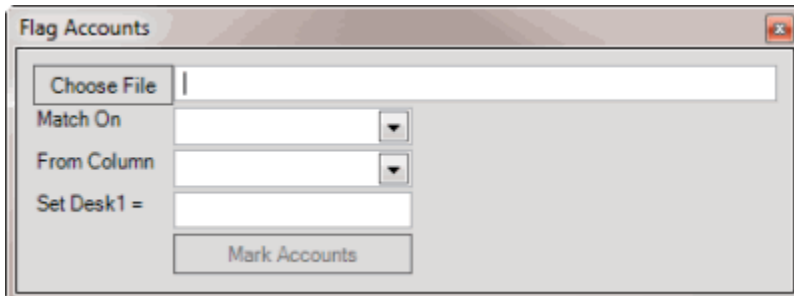
3. Click **Choose File**. The **Open** dialog box appears.

4. Click the file that contains the accounts to flag and then click **Open**.

5. In the **Match On** list box, do one of the following:

   o To match on the Latitude file number, click **Number**.

   o To match on the customer-assigned account code, click **Account**.

6. In the **From Column** list box, click the column in the Excel spreadsheet that contains the account or file number to match to Latitude.

7. In the **Set Desk1 =** box, type the information to use as a flag for the accounts (for example, Prime1). This information is include in the **Desk1** column for each account. AIM limits this box to 10 characters.

8. Click **Mark Accounts**. A notification dialog box appears when flagging is complete.

9. To use the flag when selecting accounts, open a **Select Accounts** tab in a query window, add the **Desk1** condition, and set it to the value you typed in the **Set Desk1** box. For example, add the condition and set it to pull accounts where the **Desk1** column has a value of "Prime1." For more information about selecting accounts, see Account Placements and Recalls and Queries.

Note: AIM includes this condition in the **Desk** folder within the **Accounts** folder. If it isn't available, contact Latitude by Genesys Support to have the condition added.

Create a Placement File

Use the **Place Accounts** window to create a file to place accounts with a single agency or attorney. AIM ignores constraints associated to the agency or attorney. To create placement files for multiple agencies and attorneys, see Export Data to a File. To create placement files using business rules, see Create a Placement File Using Business Rules.

To create a placement file

1. In the menu bar, click **Actions**, click **Create**, and then click **Placements**. The **Place Accounts** window appears. The "Account is Not Placed" condition appears by default.

2. To exclude duplicate records from the results, select **Exclude Duplicate Records**. For example, if you created a condition for a specific SSN, AIM only includes one account with that SSN in the results.

3. To limit the results to a specific number of records, select **Maximum Records** and then type or select the maximum number of records to include in the results.

4. In the **Select Columns** pane, add, modify, or delete columns as necessary. For more information, see Query Columns.

5. In the **Conditions** pane, add, modify, or delete conditions as necessary. For more information, see Query Conditions.

6. In the **Order** pane, set up and arrange the sort order as necessary. For more information, see Query Order.

7. To count the number of records that match the specified criteria, in the toolbar, click **Count**. The results appear in the **Query Designer** dialog box. Click **OK**.

8. To view the accounts that match the specified criteria, in the toolbar, click **Run**. The query results appear on the **Results** tab. For more information about working with query results, see Query Results.

9. To save the query, do the following:

   1. In the toolbar, click **Save**. The **Save Query Dialog** box appears.

   b. In the **Query Name** box, type a name for the query and then click **Save**.

   Tip: To overwrite an existing query, in the **Name** column, click the query to overwrite and then click **Save**.

10. To place the accounts, click **Place Accounts**. The **Which Agency/Attorney?** dialog box appears.

Which Agency/Attorney: Agency or attorney to place the accounts with.

Fee Schedule: If selected, specify the fee schedule to use to calculate commissions.

Commission Percentage: If selected, specify a commission percentage to use to calculate commissions.

Change Desk after Placement: Desk to assign to the accounts after places the account.

Auto Recall: If selected, **AIM** flags the accounts for automatic recall based on the dates specified. AIM generates automatic recalls when it exports recalls for accounts that are due for recall.

Pending Recall in Days: Date or number of days after account placement to wait to set the pending recall flag.

Final Recall After Pending in Days: Date or number of days after AIM sets the pending recall flag to wait to set the final recall flag.

Change Desk after Auto Recall: Desk to assign to the accounts after AIM recalls the accounts automatically.

New Placement Batch: If selected, type the name of the placement batch to create for the accounts.

Existing Placement Batch: If selected, click the name of the existing placement batch to which to add the accounts.

11. Complete the information and then click **OK**. AIM shows the progress in the **Execution Window**.

12. Click **OK**. AIM creates a placement file and saves it to the folder specified in global settings. If your organization configured FTP in global settings, AIM saves a copy of the file to the agency's or attorney's AIM folder on the FTP site. If your organization configured email messaging in

global settings, AIM sends an email message to the agencies and attorneys indicating that a placement file is available. For more information, see Specify General Global Settings.

Create a Pending Recall File

Use the **Recall (pending) Accounts** window to create a pending recall file for a single agency or attorney for accounts not necessarily scheduled for recall. AIM ignores agency or attorney constraints when recalling accounts from this window. To create pending recall files for multiple agencies and attorneys, see Export Data to a File.

To create a pending recall file

1. In the menu bar, click **Actions**, click **Create**, and then click **Pending Recalls**. The **Recall (pending) Accounts** window appears. The "Account is Placed" and "Account is Not Currently Objected to Recall" conditions appear by default. You cannot delete the "Account is Placed" condition.

Notes:

- If you open a query and the "Account is Placed" condition isn't in the **Conditions** pane, add it.

- To force an agency or attorney to object to a recall again, remove the "Account is Not Currently Objected to Recall" condition from the **Conditions** pane.

2. To exclude duplicate records from the results, select **Exclude Duplicate Records**. For example, if you created a condition for a specific SSN, AIM only includes one account with that SSN in the results.

3. To limit the results to a specific number of records, select **Maximum Records** and then type or select the maximum number of records to include in the results.

4. In the **Select Columns** pane, add, modify, or delete columns as necessary. For more information, see Query Columns.

5. In the **Conditions** pane, add, modify, or delete conditions as necessary. For more information, see Query Conditions.

6. In the **Order** pane, set up and arrange the sort order as necessary. For more information, see Query Order.

7. To count the number of records that match the specified criteria, in the toolbar, click **Count**. The results appear in the **Query Designer** dialog box. Click **OK**.

8. To view the accounts that match the specified criteria, in the toolbar, click **Run**. The query results appear on the **Results** tab. For more information about working with query results, see Query Results.

9. To save the query, do the following:

    1. In the toolbar, click **Save**. The **Save Query Dialog** box appears.

Save Query Dialog		
Look In: My Queries		✖ Delete 🔾 Export To File
Name	Date Created	
Accounts is Parent	12/14/2012	
Account Status is Open	12/18/2012	
Query Name:		
Cancel		Save

    b. In the **Query Name** box, type a name for the query and then click **Save**.

    Tip: To overwrite an existing query, in the **Name** column, click the query to overwrite and then click **Save**.

10. To recall the accounts, click **Recall (pending) Accounts**.
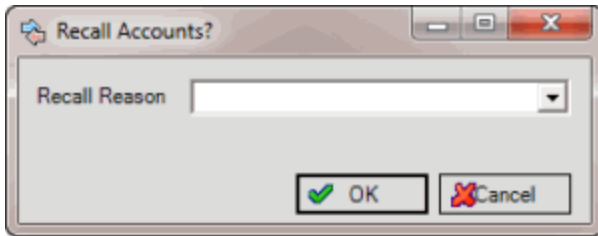
11. In the **Recall Reason** list box, click the reason for recalling the accounts and then click **OK**. AIM shows the progress in the **Execution Window**.

12. Click **OK**. AIM creates a pending recall file and saves it to the folder specified in global settings. If your organization configured FTP in global settings, AIM places a copy of the file in the agency's or attorney's AIM folder on the FTP site. If your organization configured email messaging in global settings, AIM sends an email message to the agencies and attorneys indicating that a pending recall file is available. For more information, see Specify General Global Settings.

> **Note:** If the **Auto Recall** check box was selected when AIM created the placement file and the recall date is on or before the current date, AIM includes those accounts in the pending recall file. In this case, the number of accounts included in the recall file exceeds the original count.

Create a Final Recall File

Use the **Recall Accounts** window to create a final recall file for a single agency or attorney for accounts not necessarily scheduled for recall. AIM ignores constraints associated to the agency or attorney when recalling accounts from this window. To create final recall files for multiple agencies and attorneys, see Export Data to a File.

To create a final recall file

1. In the menu bar, click **Actions**, click **Create**, and then click **Final Recalls**. The **Recall Accounts** window appears. The "Account is Placed" and "Account is Not Currently Objected to Recall" conditions appear by default. You cannot delete the "Account is Placed" condition.

2. To exclude duplicate records from the results, select **Exclude Duplicate Records**. For example, if you created a condition for a specific SSN, AIM only includes one account with that SSN in the results.

3. To limit the results to a specific number of records, select **Maximum Records** and then type or select the maximum number of records to include in the results.

4. In the **Select Columns** pane, add, modify, or delete columns as necessary. For more information, see Query Columns.

5. In the **Conditions** pane, add, modify, or delete conditions as necessary. For more information, see Query Conditions.

6. In the **Order** pane, set up and arrange the sort order as necessary. For more information, see Query Order.

7. To count the number of records that match the specified criteria, in the toolbar, click **Count**. The results appear in the **Query Designer** dialog box. Click **OK**.

8. To view the accounts that match the specified criteria, in the toolbar, click **Run**. The query results appear on the **Results** tab. For more information about working with query results, see Query Results.

9. To save the query, do the following:

1. In the toolbar, click **Save**. The **Save Query Dialog** box appears.

b. In the **Query Name** box, type a name for the query and then click **Save**.

> **Tip**: To overwrite an existing query, in the **Name** column, click the query to overwrite and then click **Save**.

10. To recall the accounts, click **Recall Accounts**.
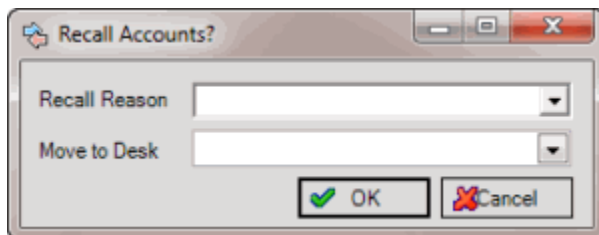
11. In the **Recall Reason** list box, click the reason for recalling the accounts.

12. To assign the accounts to a specific desk after AIM recalls them, in the **Move to Desk** list box, click the desk.

13. Click **OK**. AIM shows the progress in the **Execution Window**.

14. Click **OK**. AIM creates a final recall file and saves it to the folder specified in global settings. If your organization configured FTP in global settings, AIM places a copy of the file in the agency's or attorney's AIM folder on the FTP site. If your organization configured email messaging in global settings, AIM sends an email message to the agencies and attorneys indicating that a final recall file is available.

> **Note:** If the **Auto Recall** check box was selected when AIM created the placement file and the recall is on or before the current date, AIM includes those accounts in the final recall file. In this case, the number of accounts included in the recall file exceeds the original count.

View Scheduled Recalls

Use the **Agency/Attorney Calendar** window to view scheduled pending and final recalls. AIM includes accounts scheduled for recall the next time AIM generates files for the corresponding recall type (for example, pending or final).

To view scheduled recalls

1. In the menu bar, click **Tools** and then click **Agency/Attorney Calendar**. The **Agency/Attorney Calendar** window appears.
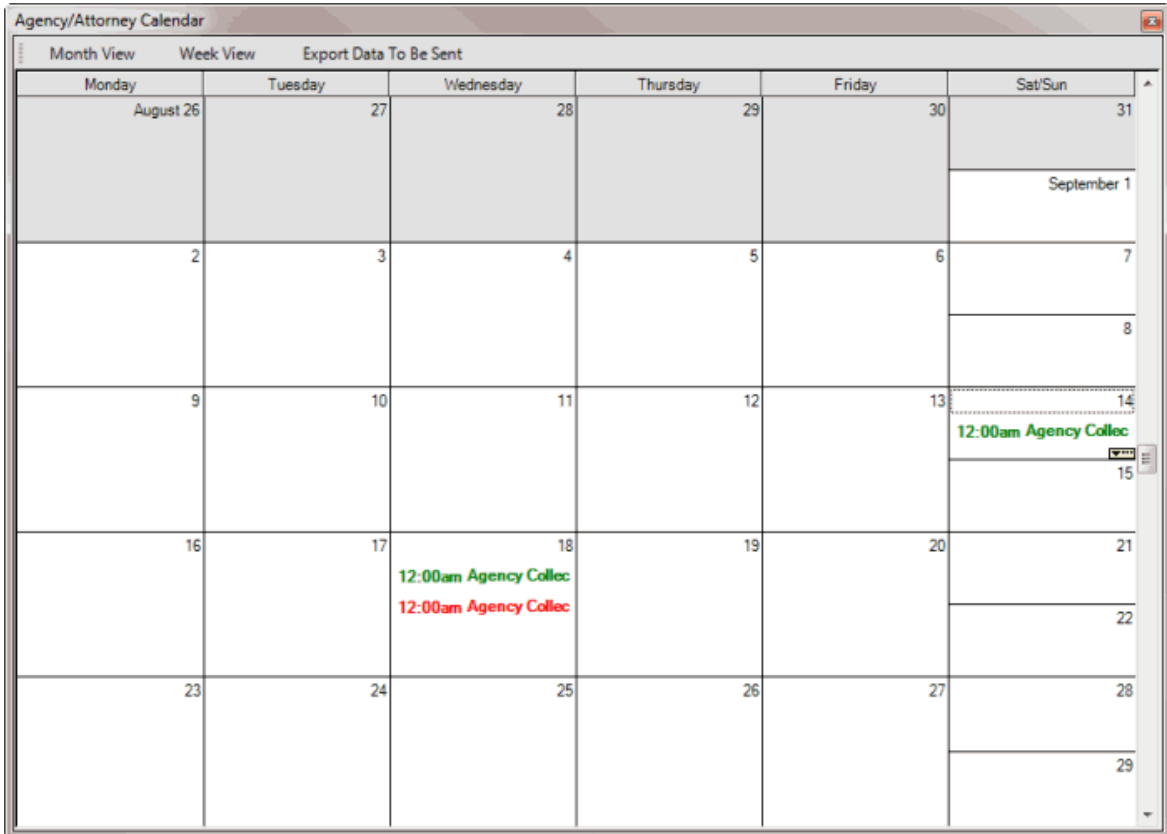
Pending recalls appear in green and final recalls appear in red. A rectangular box (see the 14th) marks the current date.

2. To change the view, in the toolbar, click **Month View** or **Week View**.

3. To view detail for a recall item, move the pointer over the item.

4. To view information regarding the number of records scheduled for export for the current date, in the toolbar, click **Export Data To Be Sent**.
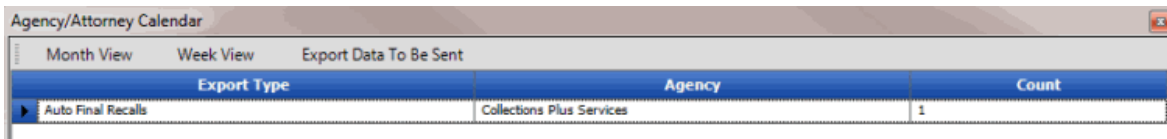
Exports

Exports

The export functionality allows you to export data to an outside agency or attorney. You can export files to place accounts with agencies and attorneys, issue account recalls, and send account updates to the agencies and attorneys who hold the accounts. You can only export one file at a time.

Export Process

Export Process

When you export information from AIM, AIM notifies the appropriate outside collection agencies and attorneys. The agencies and attorneys use the export files to import information into their system.

You can export the following information from AIM:

- Account placements

- Account recalls (manual and automatic)

- Account updates such as assets, bankruptcy, demographics, notes, and payment transactions.

Placement Export Process

The placement export process creates a file that contains accounts to place with an outside collection agency or attorney. The record types included in a placement export file are based on the global settings for exporting files. For more information, see Specify Global Settings for Exporting Files.

You can create a placement file using the following methods:

- To create a placement file for a single agency or attorney, do the steps to Create a Placement File.

- To create placement files for multiple agencies and attorneys using a business rule, do the steps to Create a Placement File Using Business Rules.

- To create placement files for placement requests that users generated in Latitude, do the steps to Export Data to a File, selecting **Placement Files (CPLC)** as the file type.

AIM saves the export files to the folder specified in global settings. If your organization configured FTP in global settings, AIM saves each agency's and attorney's file to their folder on the FTP site. If your organization configured email messaging in global settings, AIM sends an email message to the agencies and attorneys indicating that an export file is available. For more information, see Specify General Global Settings.

Recall Export Process

The recall export process creates a file that contains accounts to recall from an outside collection agency or attorney. The file includes accounts that users recalled manually and accounts that AIM flagged for automatic recall. For more information about automatic recall, see Automatic Recall.

You can create a recall file using the following methods:

- To create a pending recall file for a single agency or attorney, do the steps to Create a Pending Recall File.

- To create a final recall file for a single agency or attorney, do the steps to Create a Final Recall File.

- To create recall files for recall requests that users generated in Latitude, do the steps to Export Data to a File, selecting **Recall Files (CRCL)** as the file type.

AIM saves the export files to the folder specified in global settings. If your organization configured FTP in global settings, AIM saves each agency's and attorney's file to their folder on the FTP site. If your organization configured email messaging in global settings, AIM sends an email message to the agencies and attorneys indicating that an export file is available. For more information, see Specify General Global Settings.

Automatic Recall

AIM can flag accounts that are due for recall based on the automatic recall dates specified when you created placements. AIM flags an account only when no objection exists on the account and the recall date falls on or before the current date. When you generate a recall export file, AIM includes in the file accounts that are due (or past due) for automatic recall. If the accounts in the recall file have previous recall objections, AIM deletes them. If an agency or attorney objects to the recall, the agency or attorney must submit another recall objection.

If you receive a payment on an account while it's placed and the **Extend Placement if Payment is Received** check box is selected, AIM extends the pending and final recall dates. For more information about the check box, see Add an Agency or Attorney or Modify an Agency or Attorney.

Account Update Export Process

The account update export process creates a file that contains accounts that users updated in Latitude. The type of information included in an account update export file includes: demographics, bankruptcy, deceased, miscellaneous extra data, notes, equipment, and assets.

To create account update files, do the steps to Export Data to a File, selecting the update file type (for example, Demographic Files (CDEM), Bankruptcy Files (CBKP)). AIM saves the export files to the folder specified in global settings. If your organization configured FTP in global settings, AIM saves each agency's and attorney's file to their folder on the FTP site. If your organization configured email messaging in global settings, AIM sends an email message to the agencies and attorneys indicating that an export file is available. For more information, see Specify General Global Settings.

Export File Layouts

Export File Layouts

Use the **Export** feature to export files to agencies or attorneys to use to update accounts. If records exist that are ready for export for the specified file type, you can create the export files.

Note the following:

- Export files use the letter "C" as the first character in the export file name to indicate that the file originated in AIM. For example, CXXX. AIM uses this same format in the record type name in delimited and fixed files.

- ASCII flat files are fixed length or delimited (comma, tab, or pipe).

- Excel file names have the ".xls" extension.

- If a date field contains "19000101," interpret it as NULL.

- Dates must be blank or contain a valid date; AIM doesn't allow zero-filled date fields.

- AIM formats date fields for delimited and fixed-length files as CCYYMMDD and for Excel and XML files as MMDDCCYY.

- AIM expects a decimal point before the last two digits for monetary fields.

- For agencies and attorneys that use the YGC file format, see YGC Export File Layouts.

Assets Export File Layout

Assets Export File Layout

The assets export file contains asset information that users updated in Latitude after AIM placed the accounts. Agencies and attorneys can use these files to update account information in their system. Fixed files contain a trailer record that indicates the total number of records in the file.

Assets Export File Naming Convention

Fixed: AIMYYYYMMDDHHMMSS_####.CAST

Where #### represents the ID assigned to the agency to receive the business.

Assets Export File Record

Fixed record type = CAST

Excel worksheet name = Assets

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = CAST
Debtor ID	5-13	2	debtor_number	Integer (9)	Unique number assigned to each debtor record.
File Number	14-22	3	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.

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Asset ID	23-31	4	asset_id	Integer (9)	Code that identifies the asset.
Asset Type ID	32-40	5	asset_type_id	Integer (9)	Code that identifies the asset type.
Asset Name	41-90	6	asset_name	String (50)	Name of the asset.
Asset Description	91-290	7	asset_description	String (200)	Description of the asset.
Asset Value	291-302	8	asset_value	Decimal (12)	Value of the asset.
Asset Lien Value	303-314	9	asset_lien_value	Decimal (12)	Lien value of the asset.
Asset Value Verified Flag	315	10	asset_value_verified_flag	String (1)	Indicates whether a user verified the asset value.
Asset Lien Value Verified Flag	316	11	asset_lien_value_verified_flag	String (1)	Indicates whether a user verified the lien value.

Assets Export File Trailer Record

Fixed record type = CTRL

Excel is not used.

Latitude	Position	Format	Comment
Record Type	1-4	String (4)	Value = CTRL
Agency	5-34	String (30)	Your unique agency number.
Agency Name	35-84	String (50)	Your agency name.

Records	85-94	Integer (10)	Number of records in this file, excluding the trailer record.
Created Date	95-102	DateTime (CCYYMMDD)	File creation date.
Filler	103-418	String (316)	Filler for fixed file layout.

Bankruptcy Export File Layout

Bankruptcy Export File Layout

The bankruptcy export file contains bankruptcy information that users updated in Latitude after AIM placed the accounts. Agencies and attorneys can use these files to update account information in their system. Fixed files contain a trailer record that indicates the total number of records in the file.

Bankruptcy Export File Naming Convention

Fixed: AIMYYYYMMDDHHMMSS_####.CBKP

Where #### represents the agency code assigned to the agency to receive the business.

Bankruptcy Export File Record

Fixed record type = CBKP

Excel worksheet name = Bankruptcy

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = CBKP
Debtor ID	5-13	2	debtor_number	Integer (9)	Unique number assigned to each debtor record.
File Number	14-22	3	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Chapter	23-24	4	chapter	String (2)	Bankruptcy Chapter. Valid

					values are 7, 11, and 13.
Date Filed	25-32	5	date_filed	DateTime (CCYYMMDD)	Date the debtor filed bankruptcy.
Case Number	33-52	6	case_number	String (20)	Court case number.
Court District	53-132	7	court_district	String (80)	Court district where the debtor filed bankruptcy.
Court Division	133-212	8	court_division	String (80)	Division of the court where the debtor filed bankruptcy.
Court Phone	213-242	9	court_phone	String (30)	Court clerk's phone number
Court Street 1	243-370	10	court_street1	String (128)	Court's street line 1.
Court Street 2	371-498	11	court_street2	String 128	Court's street line 2.
Court City	499-548	12	court_city	String (50)	Court's city.
Court State	549-551	13	court_state	String (3)	Court's state.
Court ZIP Code	552-561	14	court_zipcode	String (10)	Court's postal code.
Trustee	562-611	15	trustee	String (50)	Trustee's name.
Trustee Street Address 1	612-739	16	trustee_street1	String (128)	Trustee's street line 1.

Trustee Street Address 2	740-867	17	trustee_street2	String (128)	Trustee's street line 2.
Trustee City	868-917	18	trustee_city	String (50)	Trustee's city.
Trustee State	918-920	19	trustee_state	String (3)	Trustee's state.
Trustee ZIP Code	921-930	20	trustee_zipcode	String (10)	Trustee's postal code.
Trustee Phone	931-960	21	trustee_phone	String (30)	Trustee's phone number.
Has341Info	961	22	three_forty_one_info_flag	String (1)	341 indicator (90 or 1).
DateTime341	962-969	23	three_forty_one_date	DateTime (CCYYMMDD)	341 date.
Location341	970-1049	24	three_forty_one_location	String (80)	341 location.
Comments	1050-1349	25	comments	String (300)	Bankruptcy comments.
Status	1350-1449	26	status	String (100)	Description of the account status.
Transmitted Date	1450-1457	27	transmit_date	DateTime (CCYYMMDD)	Date AIM transmitted the information.
Notice Received	1458-1465	28	notice_date	DateTime (CCYYMMDD)	Date the client received a notice that the customer filed for bankruptcy.
Proof of Claim	1466-1473	29	proof_filed_date	DateTime (CCYYMMDD)	Date the client sent a proof of

					claim to the court.
Discharge Date	1474-1481	30	discharge_date	DateTime (CCYYMMDD)	Date the court discharged the bankruptcy.
Dismissal Date	1482-1489	31	dismissal_date	DateTime (CCYYMMDD)	Date the court dismissed the bankruptcy.
Confirm Hearing	1490-1497	32	confirmation_hearing_date	DateTime (CCYYMMDD)	Date the court set the confirmation hearing.
Reaffirmation Filed Date	1498-1505	33	reaffirm_filed_date	DateTime (CCYYMMDD)	Date the customer filed the reaffirmation with the court.
Voluntary Date	1506-1513	34	voluntary_date	DateTime (CCYYMMDD)	Date the customer volunteered to pay off the debt.
Surrender Date	1514-1521	35	surrender_date	DateTime (CCYYMMDD)	Date the customer surrendered the item.
Auction Date	1522-1529	36	auction_date	DateTime (CCYYMMDD)	Date the auction house auctioned the surrendered item.
Reaffirmation Amount	1530-1541	37	reaffirm_amount	Decimal (12)	Amount that the customer reaffirmed to pay.

Voluntary Amount	1542-1553	38	voluntary_amount	Decimal (12)	Amount the customer volunteered to pay.
Auction Amount	1554-1565	39	auction_amount	Decimal (12)	Amount the auction house received for the surrendered item.
Auction Fee Amount	1566-1577	40	auction_fee_amount	Decimal (12)	Fee the auction house charged for auctioning the surrendered item.
Auction Amount Applied	1578-1589	41	auction_applied_amount	Decimal (12)	Amount of the auction funds applied to the account.
Secured amount	1590-1601	42	secured_amount	Decimal (12)	Amount of the debt that is secured. Chapters 11, 12, and 13 only.
Secured Plan Percent	1602-1613	43	secured_percentage	Decimal (12)	Percentage of the secured amount for which the customer remains responsible. Chapters 11, 12, and 13 only.
Unsecured Amount	1614-1625	44	unsecured_amount	Decimal (12)	Amount of the debt that is unsecured. Chapters 11, 12, and 13 only.

Unsecured Plan Percent	1626-1637	45	unsecured_percentage	Decimal (12)	Percentage of the unsecured amount for which the customer remains responsible. Chapters 11, 12, and 13 only.
Converted Chapter	1638-1639	46	converted_from_chapter	String (2)	Original bankruptcy chapter number.
Has Asset	1640	47	has_asset	String (1)	Customer has assets to secure the debt. Chapter 7 only.
Reaffirmation	1641	48	reaffirm_flag	String (1)	Indicates whether the customer reaffirmed the debt under new terms.
Reaffirmation Terms	1642-1691	49	reaffirm_terms	String (50)	Agreed upon terms of the reaffirmation.
Terms	1692-1741	50	voluntary_terms	String (50)	Terms of payment.
Surrender Method	1742-1791	51	surrender_method	String (50)	How the customer surrendered the item (for example, shipped or picked up).
Auction House	1792-1841	52	auction_house	String (50)	Name of the auction house that auctioned

					the surrendered item.
Country	1842-1969	53	country	String (128)	Country where the customer filed bankruptcy.
County	1970-2097	54	county	String (128)	County where the customer filed bankruptcy.

Bankruptcy Export File Trailer Record

Fixed record type = CTRL

Excel and XML are not used.

Latitude	Position	Format	Comment
Record Type	1-4	String (4)	Value = CTRL
Agency	5-34	String (30)	Your unique agency number.
Agency Name	35-84	String (50)	Your agency name.
Records	85-94	Integer (10)	Number of records in this file, excluding the trailer record.
Created Date	95-102	DateTime (CCYYMMDD)	File creation date.
Filler	103-2097	String (963)	Filler for fixed file layout.

Complaints Export File Layout

Complaints Export File Layout

The complaints export file contains complaint information that users updated in Latitude after AIM placed the accounts. Agencies and attorneys can use these files to update account information in their system. Fixed files contain a trailer record that indicates the total number of records in the file.

| Note: The complaints export feature is not available for AIM versions earlier than version 12.0. |

Complaints Export File Naming Convention

Fixed: AIMYYYYMMDDHHMMSS_####.CCPT

Where #### represents the agency code assigned to the agency to receive the business.

Complaints Export File Record

Fixed record type = CCPT

Excel worksheet name = Complaint

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = ACPT
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Debtor Number	14-22	3	debtor_number	Integer (9)	Unique number assigned to each debtor record.
Source	23-42	4	source	String (20)	
ID	43-51	5	id	Integer (9)	
Receiver Complaint ID	52-60	6	receiver_complaint_id	Integer (9)	
Against Code	61-70	7	against_code	String (10)	Category for who or what the complaint is against, such as third party, branch,

						department, or user.
Against	71-120	8	against		String (50)	Who or what the complaint is against.
Against Entity	121-375	9	against_entity		String (255)	User who specified who or what the complaint is against.
Category	376-395	10	category		String (20)	Complaint category, such as branch or department.
Compensation Amount	396-407	11	compensation_amount		Decimal (12)	Amount of compensation the debtor received.
Conclusion	408-907	12	conclusion		String (500)	Based on the investigation, the conclusion regarding the complaint.
Date Closed	908-916	13	date_closed		DateTime (CCYYMMDD)	Date your organization closed the complaint.
Date in Admin	917-925	14	date_in_admin		DateTime (CCYYMMDD)	
Date Received	926-934	15	date_received		DateTime (CCYYMMDD)	Date your organization received the complaint.
Deleted	935-935	16	deleted		String (1)	Indicates whether a

					user deleted the complaint.
Details	936-1435	17	details	String (500)	Details regarding the complaint.
Dissatisfaction	1436-1436	18	dissatisfaction	String (1)	Indicates whether the debtor is dissatisfied.
Dissatisfaction Date	1437-1445	19	dissatisfaction_date	DateTime (CCYYMMDD)	Date the debtor indicated dissatisfaction.
Grievances	1446-1945	20	grievances	String (500)	List of the debtor's grievances.
Investigation Comments to Date	1946-2445	21	investigation_comments_to_date	String (500)	Details regarding the complaint investigation.
Justified Code	2446-2455	22	justified_code	String (10)	Code that identifies the complaint justification type.
Justified	2456-2505	23	justified	String (50)	Indicates whether the complaint is justified.
Outcome Code	2506-2515	24	outcome_code	String (10)	Code that identifies the complaint outcome type.
Outcome	2516-2565	25	outcome	String (50)	Outcome of the complaint, such as

					training required or disciplinary action. Selecting an outcome closes the complaint.
Owner	2566-2575	26	owner	String (10)	
Recourse Date	2576-2583	27	recourse_date	DateTime (CCYYMMDD)	Recourse approval date.
Referred by	2584-2593	28	referred_by	String (10)	Person who referred the complaint, such as third party, customer, or user.
Root Cause Code	2594-2603	29	root_cause_code	String (10)	Code that identifies the root cause type.
Root Cause	2604-2653	30	root_cause	String (50)	Root cause of the complaint.
SLA Days	2654-2662	31	sla_days	Integer (9)	Number of days after receiving the complaint that you have to resolve it before breaching the SLA.
Status Code	2663-2672	32	status_code	String (10)	Code that identifies the complaint status type.

Status	2673-2722	33	status		String (50)	Status of the complaint.
Type Code	2723-2732	34	type_code		String (10)	Code that identifies the complaint type.
Type	2733-2782	35	type		String (50)	Type of complaint, such as human or system error.
Filler	2783-2784	36	filler		String (2)	Filler for fixed file layout.

Complaints Export File Trailer Record

Fixed record type = CTRL

Excel and XML are not used.

Latitude	Position	Format	Comment
Record Type	1-4	String (4)	Value = CTRL
Agency	5-34	String (30)	Your unique agency number.
Agency Name	35-84	String (50)	Your agency name.
Records	85-94	Integer (10)	Number of records in this file, excluding the trailer record.
Created Date	95-102	DateTime (CCYYMMDD)	File creation date.
Filler	103-2779	String (2678)	Filler for fixed file layout.

Deceased Export File Layout

Deceased Export File Layout

The deceased export file contains deceased information that users updated in Latitude after AIM placed the accounts. Agencies and attorneys can use these files to update account information in their system. Fixed files contain a trailer record that indicates the total number of records in the file.

Deceased Export File Naming Convention

Fixed: AIMYYYYMMDDHHMMSS_####.CDEC

Where #### represents the agency code assigned to the agency to receive the business.

Deceased Export File Record

Fixed record type = CDEC

Excel worksheet name = Deceased

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = CDEC
Debtor ID	5-13	2	debtor_number	Integer (9)	Unique number assigned to each debtor record.
File Number	14-22	3	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
SSN	23-31	4	ssn	String (9)	Deceased person's SSN.
First Name	32-61	5	first_name	String (30)	Deceased person's first name.
Last Name	62-91	6	last_name	String (30)	Deceased person's last name.
State	92-94	7	state	String (3)	State where deceased person resided.
Postal Code	95-104	8	postal_code	String (10)	Deceased person's postal code.

Date of Birth	105-112	9	date_of_birth	DateTime (CCYYMMDD)	Deceased person's date of birth.
Date of Death	113-120	10	date_of_death	DateTime (CCYYMMDD)	Deceased person's date of death.
Match Code	121-125	11	match_code	String (5)	Match code.
Transmitted Date	126-133	12	transmitted_date	DateTime (CCYYMMDD)	Date AIM transmitted the information.
Claim Deadline	134-141	13	claim_deadline_date	DateTime (CCYYMMDD)	Deadline for filing a claim against the customer's estate.
Date Filed	142-149	14	filed_date	DateTime (CCYYMMDD)	Date the client filed a claim against the customer's estate.
Case Number	150-169	15	case_number	String (20)	Claim case number.
Executor	170-219	16	executor	String (50)	Name of the executor of the customer's estate.
Executor Phone	220-269	17	executor_phone	String (50)	Executor's phone number.
Executor Fax	270-319	18	executor_fax	String (50)	Executor's fax number.
Executor Street1	320-447	19	executor_street1	String (128)	Executor's street address line 1.
Executor Street2	448-575	20	executor_street2	String (128)	Executor's street address line 2.
Executor State	576-578	21	executor_state	String (3)	Executor's state.
Executor City	579-678	22	executor_city	String (100)	Executor's city.

Executor Postal Code	679-688	23	executor_zipcode	String (10)	Executor's postal code.
Court City	689-738	24	court_city	String (50)	Court's city.
Court District	739-938	25	court_district	String (200)	Court district handling the customer's estate.
Court Division	939-1038	26	court_division	String (100)	Court division handling the customer's estate.
Court Phone	1039-1088	27	court_phone	String (50)	Court's phone number.
Court Street1	1089-1216	28	court_street1	String (128)	Court's street address line 1.
Court Street2	1217-1344	29	court_street2	String (128)	Court's street address line 2.
Court State	1345-1347	30	court_state	String (3)	Court's state.
Court Postal Code	1348-1362	31	court_zipcode	String (15)	Court's postal code.
Country	1363-1490	32	country	String (128)	Executor's country.
County	1491-1618	33	county	String (128)	Executor's county.

Deceased Export File Trailer Record

Fixed record type = CTRL

Excel and XML are not used.

Latitude	Position	Format	Comment
Record Type	1-4	String (4)	Value = CTRL

Agency	5-34	String (30)	Your unique agency number.
Agency Name	35-84	String (50)	Your agency name.
Records	85-94	Integer (10)	Number of records in this file, excluding the trailer record.
Created Date	95-102	DateTime (CCYYMMDD)	File creation date.
Filler	103-1618	String (1516)	Filler for fixed file layout.

Demographic Export File Layout

Demographic Export File Layout

The demographic export file contains demographic information that users updated in Latitude after AIM placed the accounts. Agencies and attorneys can use these files to update account information in their system.

Delimited or fixed file record types

Delimited and fixed files contain the following record types:

- **CUAD:** Address update records.
- **CUPH:** Phone update records.
- **CUPP:** Phone panel update records.
- **CTRL:** Trailer record that indicates the total number of records in the file.

Microsoft Excel file

Excel files contain a separate worksheet for each record type included. Excel formats the columns using the general format type. The worksheets include:

- **AddressRecord:** Address update records.
- **PhoneRecord:** Phone update records. This worksheet lists previous phone numbers flagged as bad that have a blank new number.
- **PhonePanelRecord:** Phone panel update records. This worksheet lists all newly added numbers.

Demographics Export File Naming Convention

Delimited or Fixed: AIMYYYYMMDDHHMMSS_####.CDEM

Excel: AIMYYYYMMDDHHMMSS_####.CDEM.XLS

Where #### represents the Agency code assigned to the agency to receive the business.

Demographics Export File Phone Panel Record

Delimited/fixed record type = CUPP

Excel worksheet name = PhonePanelRecord

Latitude	Position	Col	Column Name	Format	Com
Record Type	1-4	1	record_type	String (4)	Valu
Debtor ID	5-13	2	debtor_number	Integer (9)	Unic each valu
File Number	14-22	3	file_number	Integer (9)	Unic each padc data
Relationship	23-72	4	relationship	String (50)	Deb acco
Phone Type ID	73	5	phone_type_id	Integer (1)	1 = I 2 = V 3 = C 4 = I 5 = S 6 = S
Phone Status ID	74	6	phone_status_id	Integer (1)	0 = U 1 = I 2 = C AIM with pho pho doe: dem send a 'bl CUP
On Hold	75	7	on_hold	Integer (1)	0 = I 1 = C
Phone Number	76-105	8	phone_number	String (30)	Deb

Phone Extension	106-115	9	phone_ext	String (10)	Pho
Phone Name	116-145	10	phone_name	String (30)	Nam
Source	146-175	11	source	String (30)	Sour USE CON from SYN anot
Consent to Call	176-176	12	AllowManualCall	String (1)	Indic on t perr the
Consent to Auto Dial	177-177	13	AllowAutoDialer	String (1)	Indic on t perr the diale
Consent to Fax	178-178	14	AllowFax	String (1)	Indic on t perr faxe
Consent to SMS	179-179	15	AllowText	String (1)	Indic on t perr text
Method	180-180	16	WrittenConsent	String (1)	Indic on t perr
Obtained From	181-280	17	ObtainedFrom	String (100)	Part grar to cc
Effective Date	280-287	18	EffectiveDate	DateTime (MMDDYYYY)	Date grar to cc

Comment	288-407	19	Comment	String (120)	Deta contr
Filler	408-628	20	filler	String (221)	Fille layo refe
Monday Never Call	409-410	20	MondayNeverCall	String (1)	Y if
Monday Call Window Start	411-415	21	MondayCallWindowStart	Time (HHMM)	24 h
Monday Call Window End	416-420	22	MondayCallWindowEnd	Time (HHMM)	24 h
Monday No Call Window Start	421-425	23	MondayNoCallWindowStart	Time (HHMM)	24 h
Monday No Call Window End	426-430	24	MondayNoCallWindowEnd	Time (HHMM)	24 h
Tuesday Never Call	431-432	25	TuesdayNeverCall	String (1)	Y if
Tuesday Call Window Start	433-437	26	TuesdayCallWindowStart	Time (HHMM)	24 h
Tuesday Call Window End	438-442	27	TuesdayCallWindowEnd	Time (HHMM)	24 h
Tuesday No Call Window Start	443-447	28	TuesdayNoCallWindowStart	Time (HHMM)	24 h
Tuesday No Call Window End	448-452	29	TuesdayNoCallWindowEnd	Time (HHMM)	24 h
Wednesday Never Call	453-454	30	WednesdayNeverCall	String (1)	Y if
Wednesday Call Window Start	455-459	31	WednesdayCallWindowStart	Time (HHMM)	24 h
Wednesday Call Window End	460-464	32	WednesdayCallWindowEnd	Time (HHMM)	24 h
Wednesday No Call Window Start	465-469	33	WednesdayNoCallWindowStart	Time (HHMM)	24 h
Wednesday No Call Window End	470-474	34	WednesdayNoCallWindowEnd	Time (HHMM)	24 h
Thursday Never Call	475-476	35	ThursdayNeverCall	String (1)	Y if
Thursday Call Window Start	477-481	36	ThursdayCallWindowStart	Time (HHMM)	24 h
Thursday Call Window End	482-486	37	ThursdayCallWindowEnd	Time (HHMM)	24 h

Thursday No Call Window Start	487-491	38	ThursdayNoCallWindowStart	Time (HHMM)	24 h
Thursday No Call Window End	492-496	39	ThursdayNoCallWindowEnd	Time (HHMM)	24 h
Friday Never Call	497-498	40	FridayNeverCall	String (1)	Y if
Friday Call Window Start	499-503	41	FridayCallWindowStart	Time (HHMM)	24 h
Friday Call Window End	504-508	42	FridayCallWindowEnd	Time (HHMM)	24 h
Friday No Call Window Start	509-513	43	FridayNoCallWindowStart	Time (HHMM)	24 h
Friday No Call Window End	514-518	44	FridayNoCallWindowEnd	Time (HHMM)	24 h
Saturday Never Call	519-520	45	SaturdayNeverCall	String (1)	Y if
Saturday Call Window Start	521-525	46	SaturdayCallWindowStart	Time (HHMM)	24 h
Saturday Call Window End	526-530	47	SaturdayCallWindowEnd	Time (HHMM)	24 h
Saturday No Call Window Start	531-535	48	SaturdayNoCallWindowStart	Time (HHMM)	24 h
Saturday No Call Window End	536-540	49	SaturdayNoCallWindowEnd	Time (HHMM)	24 h
Sunday Never Call	541-542	50	SundayNeverCall	String (1)	Y if
Sunday Call Window Start	543-547	51	SundayCallWindowStart	Time (HHMM)	24 h
Sunday Call Window End	548-552	52	SundayCallWindowEnd	Time (HHMM)	24 h
Sunday No Call Window Start	553-557	53	SundayNoCallWindowStart	Time (HHMM)	24 h
Sunday No Call Window End	558-562	54	SundayNoCallWindowEnd	Time (HHMM)	24 h
Filler	563-3000	55	Filler	String (2438)	

Demographics Export File Phone Record

The CUPH records send a blank old number to indicate bad phone numbers.

Delimited/fixed = CUPH

Excel worksheet name = PhoneRecord

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Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = CUPH
Debtor ID	5–13	2	debtor_number	Integer (9)	Unique number assigned to each debtor record. Use this value for all data sent to AIM to identify the debtor.
File Number	14–22	3	file_number	Integer (9)	Unique number assigned to each account placed (zero padded). Use this value for all data sent to AIM.
Phone Type	23	4	phone_type	String (1)	1 = Home 2 = Work
New Number	24–53	5	new_number	String (30)	New phone number. AIM sends bad phone numbers as a 'blank' new number.
Old Number	54–83	6	old_number	String (30)	Old phone number.
Date Changed	84–91	7	date_changed	DateTime (CCYYMMDD)	Debtor phone number.
Filler	92–628	8	Filler	String (537)	Filler for fixed file layout.

Demographics Export File Address Record

Delimited/fixed record type = CUAD

Excel worksheet name = AddressRecord

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = CUAD
Debtor ID	5–13	2	debtor_number	Integer (9)	Unique number assigned to each debtor record.

Account ID	14–22	3	file_number	Integer (9)	Unique number assigned to each account placed in Latitude. Use this value for all data sent to AIM.
New Street1	23-150	4	new_street1	String (128)	Debtor's new street address line 1.
New Street2	151-278	5	new_street2	String (128)	Debtor's new street address line 2.
New City	279-308	6	new_city	String (30)	Debtor's new city.
New State	309-311	7	new_state	String (3)	Debtor's new state.
New ZIP Code	312-321	8	new_zipcode	String (10)	Debtor's new postal code.
Old Street1	322-449	9	old_street1	String (128)	Debtor's previous street address line 1.
Old Street2	450-577	10	old_street2	String (128)	Debtor's previous street address line 2.
Old City	578-607	11	old_city	String (30)	Debtor's previous city.
Old State	608-610	12	old_state	String (3)	Debtor's previous state.
Old ZIP Code	611-620	13	old_zipcode	String (10)	Debtor's previous postal code.
Date Changed	621-628	14	date_updated	DateTime (CCYYMMDD)	Date the address changed.

Demographics Export File Trailer Record

Fixed record type = CTRL

Excel and XML are not used.

Latitude	Position	Format	Comment

Record Type	1-4	String (4)	Value = CTRL
Agency	5-34	String (30)	Your unique agency number.
Agency Name	35-84	String (50)	Your agency name.
Records	85-94	Integer (10)	Number of records in this file, excluding the trailer record.
Created Date	95-102	DateTime (CCYYMMDD)	File creation date.
Filler	103-628	String (526)	Filler for fixed file layout.

Disputes Export File Layout

Disputes Export File Layout

The disputes export file contains dispute information that users updated in Latitude after AIM placed the accounts. Agencies and attorneys can use these files to update account information in their system. Fixed files contain a trailer record that indicates the total number of records in the file.

Note: The disputes export feature is not available for AIM versions earlier than version 12.0.

Disputes Export File Naming Convention

Fixed: AIMYYYYMMDDHHMMSS_####.CDIS

Where #### represents the agency code assigned to the agency to receive the business.

Disputes Export File Record

Fixed record type = CDIS

Excel worksheet name = Dispute

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = ADIS
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for

					all data sent to AIM.
Debtor Number	14-22	3	debtor_number	Integer (9)	Unique number assigned to each debtor record.
Source	23-42	4	source	String (20)	
ID	43-51	5	id	Integer (9)	
Receiver Dispute ID	52-60	6	receiver_dispute_id	Integer (9)	
Type Code	61-70	7	type_code	String (10)	Code that identifies the dispute type.
Type	71-120	8	type	String (50)	Type of dispute, such as possible fraud or incorrect trace.
Date Received	121-128	9	date_received	DateTime (CCYYMMDD)	Dispute received date.
Referred by Code	129-138	10	referred_by_code	String (10)	Code that identifies the person who referred the dispute.
Referred by	139-188	11	referred_by	String (50)	Person who referred the dispute, such as a third party or the customer.
Details	189-688	12	details	String (500)	Details regarding the dispute.
Category Code	689-698	13	category_code	String (10)	Code that identifies the dispute category.

Category	699-748	14	category	String (50)	Dispute category, such as fraud or wrong trace.
Against Code	749-758	15	against_code	String (10)	Code that identifies the person that the dispute is against.
Against	759-808	16	against	String (50)	Person that the dispute is against, such as customer or third party.
Date Closed	809-816	17	date_closed	DateTime (CCYYMMDD)	Date your organization closed the dispute. When you close the dispute or specify an outcome, Latitude populates this box with the current date.
Recourse Date	817-824	18	recourse_date	DateTime (CCYYMMDD)	Recourse approval date.
Justified	825-834	19	justified	String (10)	Indicates whether the dispute is justified.
Outcome Code	835-844	20	outcome_code	String (10)	Code that identifies the dispute outcome type.
Outcome	845-894	21	outcome	String (50)	Outcome of the dispute, such as unable to resolve. Selecting an outcome closes the dispute.

Deleted	895-895	22	deleted	String (1)	Indicates whether a user deleted the dispute.
Proof Required	896-896	23	proof_required	String (1)	Indicates whether your organization requires proof of the dispute.
Proof Requested	897-897	24	proof_requested	String (1)	Indicates whether your organization requested proof of the dispute.
Insufficient Proof Received	898-898	25	insufficient_proof_received	String (1)	Indicates whether your organization received proof that is insufficient.
Proof Received	899-899	26	proof_received	String (1)	Indicates whether your organization received proof of the dispute.

Disputes Export File Trailer Record

Fixed record type = CTRL

Excel and XML are not used.

Latitude	Position	Format	Comment
Record Type	1-4	String (4)	Value = CTRL
Agency	5-34	String (30)	Your unique agency number.
Agency Name	35-84	String (50)	Your agency name.
Records	85-94	Integer (10)	Number of records in this file, excluding the trailer record.

Created Date	95-102	DateTime (CCYYMMDD)	File creation date.
Filler	103-900	String (798)	Filler for fixed file layout.

Equipment Export File Layout

Equipment Export File Layout

The equipment export file contains equipment (physical assets) information that users updated in Latitude after AIM placed the accounts. Agencies and attorneys can use these files to update account information in their system.

Equipment Export File Naming Convention

Fixed: AIMYYYYMMDDHHMMSS_####.CEQP

Where #### represents the agency code assigned to the agency to receive the business.

Equipment Export File Record

Fixed record type = CEQP

Excel worksheet name = Equipment

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = CEQP
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Act#	14-33	3	Act#	String (20)	Account number that the creditor assigned to this account.
Collat_desc	34-83	4	Collat_desc	String (50)	Description of the collateral item.
Lic#	84-113	5	Lic#	String (30)	License number.
Vin#	114-143	6	Vin#	String (30)	Vehicle identification number.

Yr	144-153	7	Yr	String (10)	Vehicle model year.
Mk	154-183	8	Mk	String (30)	Maker of the vehicle.
Mdl	184-203	9	Mdl	String (20)	Vehicle model.
Ser	204-223	10	Ser	String (20)	Series code that identifies the vehicle.
Color	224-243	11	Color	String (20)	Color of the vehicle.
Key_CD	244-263	12	Key_CD	String (20)	Ignition key number.
Cond	264-293	13	Cond	String (30)	Condition of the vehicle.
Loc	294-323	14	Loc	String (30)	Location of the vehicle.
Tag#	324-353	15	Tag#	String (30)	License plate number.
Dlr#	354-383	16	Dlr#	String (30)	Dealer number.
PLN_CD	384-413	17	PLN_CD	String (30)	
Repo_DT	414-428	18	Repo_DT	String (15)	Date the vehicle was repossessed.
DSP_DT	429-443	19	DSP_DT	String (15)	Disposition date.
Ins	444-473	20	Ins	String (30)	Inspection results.
Prd_Cmplt#	474-503	21	Prd_Cmplt#	String (30)	
Val	504-515	22	Val	Decimal (12)	Vehicle's fair market value.
UCC_CD	516-525	23	UCC_CD	String (10)	Uniform Commercial Code.
Fil_Dt	526-540	24	Fil_Dt	String (15)	
Fil_Loc	541-570	25	Fil_Loc	String (30)	

X_Coll	571-600	26	X_Coll	String (30)	
LN#	601-630	27	LN#	String (30)	Loan number.
Rec_Mthd_CD	631-650	28	Rec_Mthd_CD	String (20)	Code that identifies the method of recovery.
Reas_CD	651-680	29	Reas_CD	String (30)	Code that identifies the reason for recovery.
Typ_CO_CD	681-710	30	Typ_CO_CD	String (30)	
DSP_CD	711-740	31	DSP_CD	String (30)	Disposition code.
DSP_ANAL	741-770	32	DSP_ANAL	String (30)	
Recovered	771	33	Recovered	String (1)	Indicates whether the client recovered the equipment.
RecoveredDate	772-779	34	RecoveredDate	DateTime (CCYYMMDD)	Date the client recovered the equipment.
Commissionable	780	35	Commissionable	String (1)	Indicates whether the equipment is commissionable.
WhenLoaded	781-788	36	WhenLoaded	DateTime (CCYYMMDD)	Date a user added the equipment to Latitude.
equipment_id	789-797	37	equipment_id	Integer (9)	Code that identifies the equipment in Latitude.

Equipment Export File Trailer Record

Fixed record type = CTRL

Excel and XML are not used.

Latitude	Position	Format	Comment

Record Type	1-4	String (4)	Value = CTRL
Agency	5-34	String (30)	Your unique agency number.
Agency Name	35-84	String (50)	Your agency name.
Records	85-94	Integer (10)	Number of records in this file, excluding the trailer record.
Created Date	95-102	DateTime (CCYYMMDD)	File creation date.
Filler	103-797	String (695)	Filler for fixed file layout.

Judgments Export File Layout

Judgments Export File Layout

The equipment export file contains equipment (physical assets) information that users updated in Latitude after AIM placed the accounts. Agencies and attorneys can use these files to update account information in their system.

Judgments Export File Naming Convention

Fixed: AIMYYYYMMDDHHMMSS_####.CJDG

Where #### represents the agency code assigned to the agency to receive the business.

Judgments Export File Record

Delimited/fixed record type = CJDG

Excel worksheet name = Judgments

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = CJDG
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for

					all data sent to AIM.
Judgment Flag	14	3	JudgmentFlag	String (1)	Contains the value "U" for update.
Case Number	15-64	4	CaseNumber	String (50)	Court case number.
Judgment Amt	65-76	5	JudgmentAmt	Decimal (12)	Principal amount awarded in the judgment.
Judgment Int Award	77-88	6	JudgmentIntAward	Decimal (12)	Interest amount awarded in the judgment.
Judgment Cost Award	89-100	7	JudgmentCostAward	Decimal (12)	Costs and fees awarded in the judgment.
Judgment Attorney Cost Award	101-112	8	JudgmentAttorneyCostAward	Decimal (12)	Attorney costs awarded in the judgment.
Judgment Other Award	113-124	9	JudgmentOtherAward	Decimal (12)	Other dollar amount awarded in the judgment.
Judgment Int Rate	125-129	10	JudgmentIntRate	Decimal (5)	New interest rate awarded in the judgment.
Int From Date	130-137	11	IntFromDate	Date (CCYYMMDD)	Date the new interest rate takes effect.
Attorney Ack Date	138-145	12	AttorneyAckDate	Date (CCYYMMDD)	Date the attorney acknowledged placement of the account.

Date Filed	146-153	13	DateFiled	Date (CCYYMMDD)	Date the creditor filed the suit against the debtor.
Service Date	154-161	14	ServiceDate	Date (CCYYMMDD)	Date the court served the debtor.
Judgment Date	162-169	15	JudgmentDate	Date (CCYYMMDD)	Date the court awarded judgment.
Judgment Recorded Date	170-177	16	JudgmentRecordedDate	Date (CCYYMMDD)	Date the clerk recorded the judgment.
Date Answered	178-185	17	DateAnswered	Date (CCYYMMDD)	Date the debtor answered the judgment.
Statute Deadline	186-193	18	StatuteDeadline	Date (CCYYMMDD)	Statute of limitations deadline.
Court Date	194-201	19	CourtDate	Date (CCYYMMDD)	Court date.
Discovery Cutoff	202-209	20	DiscoveryCutoff	Date (CCYYMMDD)	Cutoff date for discovery.
Discovery Reply Date	210-217	21	DiscoveryReplyDate	Date (CCYYMMDD)	Discovery reply date.
Motion Cutoff	218-225	22	MotionCutoff	Date (CCYYMMDD)	Cutoff date for filing motions.
Arbitration Date	226-233	23	ArbitrationDate	Date (CCYYMMDD)	Arbitration date.
Last Summary	234-241	24	LastSummaryJudgmentDate	Date (CCYYMMDD)	Last summary judgment date.

Judgment Date					
Status	242-291	25	Status	String (50)	Status of the court case.
Service Type	292-311	26	ServiceType	String (20)	Type of service performed.
Misc Info 1	312-411	27	MiscInfo1	String (100)	Miscellaneous information.
Misc Info 2	412-511	28	MiscInfo2	String (100)	Miscellaneous information.
Remarks	512-611	29	Remarks	String (100)	Comments regarding the judgment.
Plaintiff	612-711	30	Plaintiff	String (100)	Plaintiff in the case.
Defendant	712-811	31	Defendant	String (100)	Defendant in the case.
Judgment Book	812-831	32	JudgmentBook	String (20)	Number of the local records book where the clerk recorded the judgment.
Judgment Page	832-851	33	JudgmentPage	String (20)	Page in the local records book where the clerk recorded the judgment.
Judge	852-951	34	Judge	String (100)	Judge who is presiding over the case.
Court Room	952-966	35	CourtRoom	String (15)	Court room for hearing the case.

Court Name	967-1016	36	CourtName	String (50)	Name of the court.
Court County	1017-1066	37	CourtCounty	String (50)	Court's county.
Court Street 1	1067-1194	38	CourtStreet1	String (128)	Court's street address line 1.
Court Street 2	1195-1322	39	CourtStreet2	String (128)	Court's street address line 2.
Court City	1323-1372	40	CourtCity	String (50)	Court's city.
Court State	1373-1377	41	CourtState	String (5)	Court's state.
Court Zipcode	1378-1387	42	CourtZipcode	String (10)	Court's postal code.
Court Phone	1388-1437	43	CourtPhone	String (50)	Court's phone number.
Court Fax	1438-1487	44	CourtFax	String (50)	Court's fax number.
Court Salutation	1488-1537	45	CourtSalutation	String (50)	Court's salutation.
Court Clerk First Name	1538-1587	46	CourtClerkFirstName	String (50)	Court clerk's first name.
Court Clerk Middle Name	1588-1637	47	CourtClerkMiddleName	String (50)	Court clerk's middle name.
Court Clerk Last Name	1638-1687	48	CourtClerkLastName	String (50)	Court clerk's last name.

Court Notes	1688-1937	49	CourtNotes		String (250)	Court notes.

Judgments Export File Trailer Record

Fixed record type = CTRL

Excel and XML are not used.

Latitude	Position	Format	Comment
Record Type	1-4	String (4)	Value = CTRL
Agency	5-34	String (30)	Your unique agency number.
Agency Name	35-84	String (50)	Your agency name.
Records	85-94	Integer (10)	Number of records in this file, excluding the trailer record.
Created Date	95-102	DateTime (CCYYMMDD)	File creation date.
Filler	103-1781	String (1679)	Filler for fixed file layout.

Miscellaneous Extra Data Export File Layout

Miscellaneous Extra Data Export File Layout

The miscellaneous extra data export file contains miscellaneous extra data information that users updated in Latitude after AIM placed the accounts. Agencies and attorneys can use these files to update account information in their system. Fixed files contain a trailer record that indicates the total number of records in the file.

Miscellaneous Extra Data Export File Naming Convention

Fixed: AIMYYYYMMDDHHMMSS_####.CMIS

Where #### represents the agency code assigned to the agency to receive the business.

Miscellaneous Extra Data Export File Record

Fixed record type = CMIS

Excel worksheet name = MiscExtra

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Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = CMIS
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Account	14-43	3	account	String (30)	Account number that the creditor assigned to this account.
Title	44-73	4	title	String (30)	Title that describes the data.
The Data	74-173	5	thedata	String (100)	Miscellaneous data.

Miscellaneous Extra Data Export File Trailer Record

Fixed record type = CTRL

Excel and XML are not used.

Latitude	Position	Format	Comment
Record Type	1-4	String (4)	Value = CTRL
Agency	5-34	String (30)	Your unique agency number.
Agency Name	35-84	String (50)	Your agency name.
Records	85-94	Integer (10)	Number of records in this file, excluding the trailer record.
Created Date	95-102	DateTime (CCYYMMDD)	File creation date.
Filler	103-173	String (71)	Filler for fixed file layout.

Notes Export File Layout

Notes Export File Layout

The notes export file contains notes that users added or events that occurred in Latitude after account placement. The system doesn't include system-generated notes or events in the export file. Agencies and attorneys can use these files to update account information in their system. Fixed files contain a trailer record that indicates the total number of records in the file.

Notes Export File Naming Convention

Fixed: AIMYYYYMMDDHHMMSS_####.CNOT

Where #### represents the agency code assigned to the agency to receive the business.

Notes Export File Record

Fixed record type = CNOT

Excel worksheet name = Note

Latitude	Position	Col	Column Name	Format	Comment
Notes Table	1-4	1	record_type	String (4)	Value = CNOT
Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed (zero padded). Use this value for all data sent to AIM.
Created	14-27	3	created_datetime	DateTime (CCYYMMDDHHMMSS)	Date and time a user or Latitude created the note.
Action	28-33	4	note_action	String (6)	Action code assigned to the note.
Result	34-39	5	note_result	String (6)	Result code assigned to the note.
Comment	40-339	6	note_comment	String (300)	Comment regarding the note.

Notes Export File Trailer Record

Fixed record type = CTRL

Excel and XML are not used.

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Latitude	Position	Format	Comment
Record Type	1-4	String (4)	Value = CTRL
Agency	5-34	String (30)	Your unique agency number.
Agency Name	35-84	String (50)	Your agency name.
Records	85-94	Integer (10)	Number of records in this file, excluding the trailer record.
Created Date	95-102	DateTime (CCYYMMDD)	File creation date.
Filler	103-339	String (237)	Filler for fixed file layout.

Payments Export File Layout

Payments Export File Layout

The payments export file contains payments and adjustments that users added in Latitude after AIM placed the accounts. Agencies and attorneys can use these files to update account balance information in their system. Delimited and fixed files contain a trailer record that indicates the total number of payments reported and the total dollars for each account item adjusted. If the number and value of accounts in the trailer file doesn't match the data in the payment and adjustment file, the agency or attorney shouldn't process the file.

Payments Export File Naming Convention

Delimited or Fixed: AIMYYYYMMDDHHMMSS_####.CPAY

Excel: AIMYYYYMMDDHHMMSS_####.CPAY.XLS

Where #### represents the agency code assigned to the agency to receive the business.

Payments Export File Record

Fixed record type = CPAY

Excel worksheet name = PayHistory

> **Note:** For more information about the Paid3 through Paid9 fields, see your agency coordinator.

Latitude	Position	Col	Column Name	Format	Comment

PayHistory Record	1-4	1	record_type	String (4)	Value = CPAY
Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Master.Account	14-43	3	account	String (30)	Account number that the creditor assigned to this account.
Paid1	44-55	4	principal	Decimal (12)	Amount of principal included in the payment.
Paid2	56-67	5	interest	Decimal (12)	Amount of interest included in the payment.
Paid3	68-79	6	other3	Decimal (12)	Other amounts included in the payment.
Paid4	80-91	7	other4	Decimal (12)	Other amounts included in the payment.
Paid5	92-103	8	other5	Decimal (12)	Other amounts included in the payment.
Paid6	104-115	9	other6	Decimal (12)	Other amounts included in the payment.
Paid7	116-127	10	other7	Decimal (12)	Other amounts included in the payment.
Paid8	128-139	11	other8	Decimal (12)	Other amounts included in the payment.

Paid9	140-151	12	other9	Decimal (12)	Other amounts included in the payment.
DatePaid	152-159	13	payment_date	DateTime (CCYYMMDD)	Date AIM processed the payment.
BatchType	160-162	14	batch_type	String (3)	Type of payment batch.
Payhistory.UID	163-192	15	payment_identifier	String (30)	Unique code that identifies the payment.
Comment	193-222	16	comment	String (30)	Description of the payment transaction.

Payments Export File Trailer Record

Fixed record type = CTRL

Excel and XML are not used.

Latitude	Position	Format	Comment
Record Type	1-4	String (4)	Value = CTRL
Agency	5-34	String (30)	Your unique agency number.
Agency Name	35-84	String (50)	Your agency name.
Records	85-94	Integer (10)	Number of records in this file, excluding the trailer record.
Principal	95-106	Decimal (12)	Principal payment amount.
Interest	107-118	Decimal (12)	Interest payment amount.
Paid3	119-130	Decimal (12)	Other monies paid.

Paid4	131-142	Decimal (12)	Other monies paid.
Paid5	143-154	Decimal (12)	Other monies paid.
Paid6	155-166	Decimal (12)	Other monies paid.
Paid7	167-178	Decimal (12)	Other monies paid.
Paid8	179-190	Decimal (12)	Other monies paid.
Paid9	191-202	Decimal (12)	Other monies paid.
Created Date	203-210	DateTime (CCYYMMDD)	File creation date.
Filler	211-222	String (12)	Filler for fixed file layout.

Placements Export File Layout

Placements Export File Layout

The placement export file contains new accounts to place with the agency or attorney. Delimited and fixed files contain a trailer record that indicates the total number of accounts placed and the dollar value of the accounts. If the number and value of accounts in the trailer file don't match the data in the placement file, the agency or attorney shouldn't process the file.

The following table lists the delimited and fixed file record types, and the Microsoft Excel file names. Microsoft Excel files contain a separate worksheet for each record type included. Excel formats all columns using the general format type.

Record Type	Excel File	Description
CACT	Master	Account record. Contains financial information for the account.
CAAA	AutoAuctionAppraisal	Auto auction appraisal record. Contains vehicle auction appraisal information for a debtor on the account.
CAAB	AutoAuctionBid	Auto auction bid record. Contains vehicle auction bid information for a debtor on the account.

CAAU	AutoAuction	Auto auction record. Contains vehicle auction information for a debtor on the account.
CACO	AutoCollateral	Auto collateral record. Contains vehicle collateral information for a debtor on the account.
CALS	AutoLease	Auto lease record. Contains vehicle lease information for a debtor on the account.
CARB	AutoAuctionRepairBid	Auto auction repair bid record. Contains vehicle auction repair bid information for a debtor on the account.
CARH	AutoRepossessionHistory	Auto repossession history record. Contains vehicle repossession history information for a debtor on the account.
CARP	AutoRepossession	Auto repossession record. Contains vehicle repossession information for a debtor on the account.
CAST	Assets	Assets record. Contains asset information for a debtor on the account.
CCPT	Complaint	Complaint record. Contains complaint information for the account.
CBKP	Bankruptcy	Debtor bankruptcy record. Contains bankruptcy information for a debtor on the account.
CD## (00-99)	Debtor	Debtor record. Contains the debtor records that exist for the account. AIM numbers each debtor record, starting with 00 for the primary debtor.
CDEC	Deceased	Debtor deceased record. Contains deceased information for a debtor on the account.
CDIS	Dispute	Dispute record. Contains dispute information for the account.

CEQP	Equipment	Equipment record. Contains equipment information for the account.
CINS	Insurance	Insurance record. Contains medical insurance information for a debtor on the account.
CJDG	Judgments	Judgment record. Contains judgment information for the account.
CMIS	MiscExtra	Miscellaneous extra data record. Contains user-defined data associated to the account. An unlimited number of these records can exist in the placement file.
CNOT	Notes	Note record. Contains notes associated to the account.
CPAT	PatientInfo	Patient record. Contains medical patient information for a debtor on the account.
CTRL	No Excel or XML	Trailer record. Contains the total number of records in the file.
CUPP	Phones	Phone record: Contains phone information for the account. An unlimited number of these records can exist in the placement file.

Placement Export File Naming Convention

Delimited or Fixed: AIMYYYYMMDDHHMMSS_####.CPLC

Excel: AIMYYYYMMDDHHMMSS_####.CPLC.XLS

Where #### represents the agency code assigned to the agency to receive the business.

Placement Export File Account Record

Fixed record type = CACT

Excel worksheet name = Master

Notes:

- For more information about the Current3 through Current9 fields, see your agency coordinator.

- * Add these amounts to calculate the total amount due on an account.

Latitude	Position	Col	Column Name	Format	Co...
Record Type	1-4	1	record_type	String (4)	Val...
Number	5-13	2	file_number	Integer (9)	Uni... acc... val...
Account	14-43	3	account	String (30)	Acc... ass...
Current1	44-55	4	principal*	Decimal (12)	Prir... age...
Current2	56-67	5	interest*	Decimal (12)	Inte... age...
Current3	68-79	6	other3*	Decimal (12)	Oth...
Current4	80-91	7	other4*	Decimal (12)	Oth...
Current5	92-103	8	other5*	Decimal (12)	Oth...
Current6	104-115	9	other6*	Decimal (12)	Oth...
Current7	116-127	10	other7*	Decimal (12)	Oth...
Current8	128-139	11	other8*	Decimal (12)	Oth...
Current9	140-151	12	other9*	Decimal (12)	Oth...
CLIDLC	152-159	13	last_charge	DateTime (CCYYMMDD)	Las... pos...
CLIDLP	160-167	14	last_paid	DateTime (CCYYMMDD)	Las... pos...
UserDate1	168-175	15	userdate1	DateTime (CCYYMMDD)	Use... info... coo...

UserDate2	176-183	16	userdate2	DateTime (CCYYMMDD)	Use info coc
UserDate3	184-191	17	userdate3	DateTime (CCYYMMDD)	Use info coc
OriginalCreditor	192-221	18	original_creditor	String (30)	Ori
LastInterest	222-229-	19	last_interest	DateTime (CCYYMMDD)	Dat this
LastInterestRate	230-241	20	interest_rate	Decimal (12)	Inte
CustDivision	242-271	21	customer_division	String (30)	Age
CustDistrict	272-301	22	customer_district	String (30)	Age
CustBranch	302-331	23	customer-branch	String (30)	Age
ID1	332-361	24	id1	String (30)	Use
ID2	362-391	25	id2	String (30)	Use
DeskID	392-401	26	desk	String (10)	Des
CustomerID	402-408	27	customer	String (7)	Coc
ChargeOffDate	409-416	28	chargeoffdate	DateTime (CCYYMMDD)	Dat
DelinquencyDate	417-424	29	delinquencydate	DateTime (CCYYMMDD)	Dat
Lastpaidamt	425-436	30	last_paid_amount	Decimal (12)	Las
ContractDate	437-444	31	contractdate	DateTime (CCYYMMDD)	Dat
clidlp	445-452	32	clidlp	DateTime (CCYYMMDD)	Las
clidlc	453-460	33	clidlc	DateTime (CCYYMMDD)	Las acc

clialp	461-472	34	clialp	Decimal (12)	Las rec
clialc	473-484	35	clialc	Decimal (12)	Las
Previous Creditor	485-534	36	previous_creditor	String (50)	Pre
Purchased Date	535-542	37	purchaseddate	DateTime (CCYYMMDD)	Dat
Customer ID	543-552	38	customer_alphacode	String (10)	Cod
Customer Company	553-602	39	customer_company	String (50)	Nar
Customer Name	603-652	40	customer_name	String (50)	Nar
AIM Investor Group Name	653-702	41	AIM_InvestorGroupName	String (50)	Nar
AIM Seller Group Name	703-752	42	AIM_SellerGroupName	String (50)	Nar
Filler	753-3000	36	Filler	String (2248)	Fill
Itemization Date	753-762	43	ItemizationDate	DateTime (CCYYMMDD)	Effe
Itemization Date Type	763-788	44	ItemizationDateType	String (25)	Des
Itemization Balance	789-801	45	ItemizationBalance	Decimal (12)	Tot
Itemization Principal	802-814	46	ItemizationPrincipal	Decimal (12)	Prir
Itemization Interest	815-827	47	ItemizationInterest	Decimal (12)	Inte
Itemization Fees / Charges	828-840	48	ItemizationFeesCharges	Decimal (12)	Fee
Itemization Payments / Credits	841-853	49	ItemizationPaymentsCredits	Decimal (12)	Pay
Itemization Other	854-866	50	ItemizationOther	Decimal (12)	Oth
Filler	867-3000	51	Filler	String (2134)	

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Placement Export File Assets Record

Fixed record type = CAST

Excel worksheet name = Assets

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = CAST
Debtor ID	5-13	2	debtor_number	Integer (9)	Unique number assigned to each debtor record.
File Number	14-22	3	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Asset ID	23-31	4	asset_id	Integer (9)	Code that identifies the asset.
Asset Type ID	32-40	5	asset_type_id	Integer (9)	Code that identifies the asset type.
Asset Name	41-90	6	asset_name	String (50)	Name of the asset.
Asset Description	91-290	7	asset_description	String (200)	Description of the asset.
Asset Value	291-302	8	asset_value	Decimal (12)	Value of the asset.
Asset Lien Value	303-314	9	asset_lien_value	Decimal (12)	Lien value of the asset.
Asset Value Verified Flag	315	10	asset_value_verified_flag	String (1)	Indicates whether a user verified the asset value.

Latitude	Position	Col	Column Name	Format	Comment
Asset Lien Value Verified Flag	316	11	asset_lien_value_verified_flag	String (1)	Indicates whether a user verified the lien value.
Filler	317-3000	12	Filler	String (2684)	Filler for fixed file layout.

Placement Export File Auto Auction Record

Fixed record type = CAAU

Excel worksheet name = AutoAuction

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = CAAU
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Bid Close Date	14-21	4	BidCloseDate	DateTime (CCYYMMDD)	Date bidding on the vehicle closed.
Collateral Appraiser Code	22-26	5	CollateralAppraiserCode	String (5)	Code that identifies the appraiser.
Buyer PO Number	27-36	6	BuyerPONumber	String (10)	Buyer's purchase order number.

Date Collateral Available for Sale	37-44	7	DateCollateralAvailableforSale	DateTime (CCYYMMDD)	Date the vehicle became available for sale.
Date Appraisal Received	45-52	8	DateAppraisalReceived	DateTime (CCYYMMDD)	Date your organization received the appraisal.
Inspection Date	53-60	9	InspectionDate	DateTime (CCYYMMDD)	Date the appraiser inspected the vehicle.
Date of Letter to Lien Holder1	61-68	10	DateofLettertoLienHolder1	DateTime (CCYYMMDD)	Date your organization sent a letter to the first lien holder regarding auctioning of the vehicle.
Date of Letter to Lien Holder2	69-76	11	DateofLettertoLienHolder2	DateTime (CCYYMMDD)	Date your organization sent a letter to the second lien holder regarding auctioning of the vehicle.
Date Repairs Completed	77-84	12	DateRepairsCompleted	DateTime (CCYYMMDD)	Repair completion date.
Date Repairs Ordered	85-92	13	DateRepairsOrdered	DateTime (CCYYMMDD)	Repair order date.

Date Repairs Approved	93-100	14	DateRepairsApproved	DateTime (CCYYMMDD)	Repair approval date.
Title Ordered Date	101-108	15	TitleOrderedDate	DateTime (CCYYMMDD)	Date your organization ordered the vehicle title.
Title Sent to Auction	109-116	16	TitleSenttoAuction	DateTime (CCYYMMDD)	Date your organization sent the vehicle title to the auction house.
Date Payment Received for Collateral	117-124	17	DatePaymentReceivedforCollateral	DateTime (CCYYMMDD)	Date your organization received the payment from the auction house.
Title Received Date	125-132	18	TitleReceivedDate	DateTime (CCYYMMDD)	Date the auction house received the vehicle title.
Date Collateral Sold	133-140	19	DateCollateralSold	DateTime (CCYYMMDD)	Date the vehicle sold at auction.
Date Appraisal Verified	141-148	20	DateAppraisalVerified	DateTime (CCYYMMDD)	Appraisal verification date.
Date Notice Sent to Guarantor	149-156	21	DateNoticeSenttoGuarantor	DateTime (CCYYMMDD)	Date your organization sent a notice to the guarantor

					regarding auctioning of the vehicle.
Date Notice Sent to Maker	157-164	22	DateNoticeSenttoMaker	DateTime (CCYYMMDD)	Date your organization sent a notice to the lender regarding auctioning of the vehicle.
Date Notice Sent to Other	165-172	23	DateNoticeSenttoOther	DateTime (CCYYMMDD)	Date your organization sent a notice to another party regarding auctioning of the vehicle.
Repair Description	173-472	24	RepairDescription	String (300)	Description of the needed repairs.
Collateral Repairs Needed	473	25	CollateralRepairsNeeded	String (1)	Indicates whether the vehicle needs repair.
Sell As Is or Repaired	474	26	SellAsIsorRepaired	String (1)	Indicates whether the vehicle is selling in "as is" or "repaired" condition.

Collateral Sale Price	475-486	27	CollateralSalePrice	Decimal (12)	Amount the vehicle sold for.
Collateral Stock Number	487-506	28	CollateralStockNumber	String (20)	Stock number the auction house assigned to the vehicle.
Repaired Value	507-518	29	RepairedValue	Decimal (12)	Monetary value of the vehicle after repairs.
Repair Comments	519-818	30	RepairComments	String (300)	Comments regarding the repairs.
Location	819-918	31	Location	String (100)	Location of the auction house.
Auction Expense	919-930	32	AuctionExpense	Decimal (12)	Fees associated with auctioning the vehicle.
Filler	931-3000	33	Filler	String (2684)	Filler for fixed file layout.

Placement Export File Auto Auction Appraisal Record

Fixed record type = CAAA

Excel worksheet name = AutoAuctionAppraisal

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = CAAA

Latitude	Position	Col	Column Name	Format	Comment
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
ID	14-22	3	ID	Integer (9)	Code that identifies the vehicle.
Appraiser Code	23-32	4	AppraiserCode	String (10)	Code that identifies the appraiser.
Average Value	33-44	5	AverageValue	Decimal (12)	Average value of the vehicle.
Retail Value	45-56	6	RetailValue	Decimal (12)	Retail value of the vehicle.
Source Publication	57-86	7	AppraisalSourcePublication	String (30)	Source from which your organization obtained the appraisal (for example, Kelley Blue Book).
Appraisal Received	87-94	8	AppraisalReceivedDate	DateTime (CCYYMMDD)	Date your organization received the appraisal.
Filler	95-3000	9	Filler	String (2906)	Filler for fixed file layout.

Placement Export File Auto Auction Bid Record

Fixed record type = CAAB

Excel worksheet name = AutoAuctionBid

Latitude	Position	Col	Column Name	Format	Comment

Record Type	1-4	1	record_type	String (4)	Value = CAAB
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
ID	14-22	3	ID	Integer (9)	Code that identifies the vehicle.
Bidder Code	23-32	4	BidderCode	String (10)	Code that identifies the bidder.
Bid Amount	33-44	5	BidAmount	Decimal (12)	Amount of the bid.
Accept Bid	45	6	AcceptBid	String (1)	Indicates whether your organization accepted the bid.
Bid Date	46-53	7	BidDate	DateTime (CCYYMMDD)	Date the buyer placed the bid.
Filler	54-3000	8	Filler	String (2947)	Filler for fixed file layout.

Placement Export File Auto Auction Repair Bid Record

Fixed record type = CARB

Excel worksheet name = AutoAuctionRepairBid

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = CARB
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
ID	14-22	3	ID	Integer (9)	Code that identifies the vehicle.
Repair Code	23-32	4	RepairCode	String (10)	Code that identifies the type of repair.

Repair Estimate	33-44	5	RepairEstimate	Decimal (12)	Estimated cost of repair.
Accept Estimate	45	6	AcceptEstimate	String (1)	Indicates whether your organization accepted the repair estimate.
Filler	46-3000	7	Filler	String (2955)	Filler for fixed file layout.

Placement Export File Auto Collateral Record

Fixed record type = CACO

Excel worksheet name = AutoCollateral

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = CACO
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Collateral Year	14-22	3	CollateralYear	Integer (9)	Vehicle model year.
Make	23-50	4	Make	String (28)	Vehicle manufacturer.
Model	51-78	5	Model	String (28)	Vehicle model.
VIN	79-108	6	VIN	String (30)	Vehicle Identification Number.
Addons	109-308	7	Addons	String (200)	Optional features on the vehicle.

Color	309-328	8	Color	String (20)	Color of the vehicle.
Collateral Miles Hours	329-338	9	CollateralMilesHours	String (10)	Number of miles or hours on the vehicle.
Miles Hours	339-347	10	MilesHours	Integer (9)	Number of miles or hours on the vehicle.
Collateral Damaged	348	11	CollateralDamaged	String (1)	Lien holder considers the vehicle damaged.
Collateral Totaled	349	12	CollateralTotaled	String (1)	Lien holder considers the vehicle totalled.
Condition Description	350-649	13	ConditionDescription	String (300)	Description of the condition of the vehicle.
Sell Collateral	650	14	SellCollateral	String (1)	Lien holder intends to sell the vehicle for collateral.
Ignition Key Number	651-660	15	IgnitionKeyNumber	String (10)	Number that identifies the ignition key.
Other Key Number	661-670	16	OtherKeyNumber	String (10)	Number that identifies an extra vehicle key, such as the valet key.
Tag Decal State	671-672	17	TagDecalState	String (2)	State listed on the vehicle's license plate.

Tag Decal Number	673-682	18	TagDecalNumber	String (10)	Vehicle's license plate number.
Tag Decal Year	683-691	19	TagDecalYear	Integer (9)	Vehicle's license plate year.
Title Position	692-700	20	TitlePosition	Integer (9)	Position of the title (for example, original, duplicate).
Title State	701-702	21	TitleState	String (2)	State listed on the vehicle's titled.
Have Title	703	22	HaveTitle	String (1)	Indicates whether your organization has the title.
Dealer Code	704-733	23	DealerCode	String (30)	Dealer's license number.
Legal Code	734-743	24	LegalCode	String (10)	Legal code that grants the lien holder or credit agency the right to repossess the vehicle when the borrower defaults on the loan or lease agreement.
Volume Date	744-751	25	VolumeDate	DateTime (CCYYMMDD)	
Finance Charge Due	752-763	26	FinanceChargeDue	Decimal (12)	Finance charge due on the loan.

Late Charge Due	764-775	27	LateChargeDue	Decimal (12)	Late charge due on the loan.
Dealer Endorsement Code	776-785	28	DealerEndorsementCode	String (10)	Code that identifies the dealer's auto-broker endorsement.
Dealer Reserve Charge Back	786-797	29	DealerReserveChargeback	Decimal (12)	Amount the finance company charged back to the dealer for early payoff of a loan.
Termination Date	798-805	30	TerminationDate	DateTime (CCYYMMDD)	Termination date of the loan contract.
Termination Effective Date	806-813	31	TerminationEffectiveDate	DateTime (CCYYMMDD)	Date the termination of the loan contract became effective.
Fair Market Value	814-825	32	FairMarketValue	Decimal (12)	Amount the vehicle would sell for on the open market.
Purchase Amount	826-837	33	PurchaseAmount	Decimal (12)	Purchase amount the vehicle.
Manufacturing Code	838-846	34	ManufacturingCode	Integer (9)	Code that identifies the vehicle manufacturer.

MSRP	847-858	35	MSRP	Decimal (12)	Manufacturer Suggested Retail Price.
Series Identifier	859-867	36	SeriesIdentifier	Integer (9)	Series code that identifies the vehicle.
Title Status	868-876	37	TitleStatus	Integer (9)	Status of the vehicle's title (for example, salvage, rebuilt, junk).
Filler	877-3000	38	Filler	String (2124)	Filler for fixed file layout.

Placement Export File Auto Lease Record

Fixed record type = CALS

Excel worksheet name = AutoLease

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = CALS
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Term Months	14-23	3	TermMonths	String (10)	Length of the lease, in months.
Maturity Date	24-31	4	MaturityDate	DateTime (CCYYMMDD)	Date the lease matured.
Effective Date	32-39	5	EffectiveDate	DateTime (CCYYMMDD)	Date the lease became effective.

Original Miles	40-48	6	OriginalMiles	Integer (9)	Original mileage on the leased vehicle.
Contract Miles	49-57	7	ContractMiles	Integer (9)	Mileage allowed under the leasing contract.
Purchase Miles	58-66	8	PurchaseMiles	Integer (9)	Number of extra miles purchased.
End of Term Miles	67-75	9	EndofTermMiles	Integer (9)	Mileage at the end of the lease term.
Residual	76-87	10	Residual	Decimal (12)	Lease-end value of the vehicle.
Contract Obligation	88-99	11	ContractObligation	Decimal (12)	Total amount due under the lease agreement. This amount excludes the security deposit, sales tax, and any other fees and taxes paid to a third party.
Security Deposit	100-111	12	SecurityDeposit	Decimal (12)	Amount the lessee paid as a security deposit.
Unpaid Months Payment	112-123	13	UnpaidMonthsPayment	Decimal (12)	Number of months during the lease term that the lessee did not make a payment.
Unpaid Tax	124-135	14	UnpaidTax	Decimal (12)	Amount in unpaid taxes that the lessee owes.
Excess Mileage	136-147	15	ExcessMileage	Decimal (12)	Amount charged for each mile in excess of the mileage limit.

Wear and Tear	148-159	16	WearandTear	Decimal (12)	Total amount charged for wear and tear on the vehicle.
Return Date	160-167	17	ReturnDate	DateTime (CCYYMMDD)	Date the leasing agency received the vehicle.
Excess Miles	168-176	18	ExcessMiles	Integer (9)	Amount charged for each mile in excess of the mileage limit.
Unused Miles	177-185	19	UnusedMiles	Integer (9)	Number of unused contract and purchased miles.
Inception Miles	186-194	20	InceptionMiles	Integer (9)	Mileage at the beginning of the lease term.
Mileage Credit	195-206	21	MileageCredit	Decimal (12)	Amount credited for unused mileage.
Minor Wear Charge	207-218	22	MinorWearCharge	Decimal (12)	Amount charged for minor wear on the vehicle.
Major Wear Charge	219-230	23	MajorWearCharge	Decimal (12)	Amount charged for major wear on the vehicle.
Disposal Assessed Amount	231-242	24	DisposalAssessedAmount	Decimal (12)	Amount charged to dispose of the vehicle.
Residual Gain Loss	243-254	25	ResidualGainLoss	Decimal (12)	Difference between the residual value and the end-of-lease purchase price.

Latitude	Position	Col	Column Name	Format	Comment
End of Term Tax Assessed	255-266	26	EndofTermTaxAssessed	Decimal (12)	Tax assessed at the end of the lease.
Other Tax Assessed	267-278	27	OtherTaxAssessed	Decimal (12)	Amount charged for other taxes (for example, property tax).
Disposition Date	279-286	28	DispositionDate	DateTime (CCYYMMDD)	Date the leasing agency determined the status of the returned vehicle.
Inspection Received Date	287-294	29	InspectionReceivedDate	DateTime (CCYYMMDD)	Date the leasing agency inspected the vehicle.
Filler	295-3000	30	Filler	String (2706)	Filler for fixed file layout.

Placement Export File Auto Repossession Record

Fixed record type = CARP

Excel worksheet name = AutoRepossession

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = CARP
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Status	14-43	3	Status	String (30)	Status of the vehicle repossession.

Date Repo Assigned	44-51	4	DateRepoAssigned	DateTime (CCYYMMDD)	Repossession agency assignment date.
Date into Storage	52-59	5	DateintoStorage	DateTime (CCYYMMDD)	Repossessed vehicle's storage date.
Collateral Condition	60-89	6	CollateralCondition	String (30)	Condition of the vehicle when the agency repossessed it.
Collateral Drivable	90	7	CollateralDrivable	String (1)	Indicates whether the vehicle was drivable when the agency repossessed it.
Collateral Lease End Repo	91-120	8	CollateralLeaseEndRepo	String (30)	Indicates whether the lease ended or the agency repossessed the vehicle.
Collateral Redeemed by	121-160	9	CollateralRedeemedby	String (40)	Person who redeemed the vehicle.
Collateral Repo Code	161-190	10	CollateralRepoCode	String (30)	Vehicle factory key code that allows the repossession agency to drive the vehicle away rather than tow it.

Collateral Storage Location	191-290	11	CollateralStorageLocation	String (100)	Storage location of the repossessed vehicle.
Date Collateral Released to Buyer	291-298	12	DateCollateralReleasedtoBuyer	DateTime (CCYYMMDD)	Vehicle release date to customer.
Collateral Released	299-328	13	CollateralReleased	String (30)	Method of release of vehicle to customer.
Repo Address1	329-358	14	RepoAddress1	String (30)	Street address line 1 where the vehicle is located.
Repo Address2	359-388	15	RepoAddress2	String (30)	Street address line 1 where the vehicle is located.
Repo City	389-438	16	RepoCity	String (50)	City where the vehicle is located.
Repo State	439-440	17	RepoState	String (2)	State where the vehicle is located.
Repo ZIP Code	441-449	18	RepoZIP Code	String (9)	Postal Code where the vehicle is located.
Date Repo Completed	450-457	19	DateRepoCompleted	DateTime (CCYYMMDD)	Date the agency

					repossessed the vehicle.
Redemption Date	458-465	20	RedemptionDate	DateTime (CCYYMMDD)	Last date the customer has to redeem the vehicle.
Redemption Amount	466-477	21	RedemptionAmount	Decimal (12)	Amount the customer must remit to redeem the vehicle. This amount can include past due amounts, total remainder of the debt, and any fees incurred from the repossession.
Storage Comments	478-777	22	StorageComments	String (300)	Comments regarding storage of the repossessed vehicle.
Agency Name	778-807	23	AgencyName	String (30)	Name of the repossession agency.
Agency Phone	808-857	24	AgencyPhone	String (50)	Repossession agency's phone number.
Balance at Repo	858-869	25	BalanceatRepo	Decimal (12)	Balance due on the loan or lease when the vehicle was repossessed.

Repo Fees	870-881	26	RepoFees	Decimal (12)	Repossession fees incurred.
Property Storage Fee	882-893	27	PropertyStorageFee	Decimal (12)	Storage fees incurred.
Key Cut Fee	894-905	28	KeyCutFee	Decimal (12)	Fee for having a key made.
Misc Fees	906-917	29	MiscFees	Decimal (12)	Miscellaneous fees related to the repossession.
Impound Fee	918-929	30	ImpoundFee	Decimal (12)	Impound fee incurred.
Repo Expenses	930-941	31	RepoExpenses	Decimal (12)	Cost of repossessing the vehicle.
Policy Entity	942-1041	32	PolicyEntity	String (100)	Insurance agency where the repossession company has an insurance policy.
Filler	1042-3000	33	Filler	String (1959)	Filler for fixed file layout.

Placement Export File Auto Repossession History Record

Fixed record type = CARH

Excel worksheet name = AutoRepossessionHistory

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = CARH

File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
ID	14-22	3	ID	Integer (9)	Code that identifies the vehicle.
Logon Name	23-52	4	LoginName	String (30)	User's logon name.
Status	53-82	5	Status	String (30)	Status of the vehicle repossession.
Agency Name	83-112	6	AgencyName	String (30)	Name of the repossession agency.
Date	113-120	7	DateTimeStamp	DateTime (CCYYMMDD)	Date the vehicle was repossessed.
Comment	121-620	8	Comment	String (500)	Comment regarding the repossession.
Filler	621-3000	9	Filler	String (2380)	Filler for fixed file layout.

Placement Export File Complaints Record

Fixed record type = CCPT

Excel worksheet name = Complaint

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = ACPT
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.

Debtor Number	14-22	3	debtor_number	Integer (9)	Unique number assigned to each debtor record.
ID	23-31	4	id	Integer (9)	
Against Code	32-41	5	against_code	String (10)	Category for who or what the complaint is against, such as third party, branch, department, or user.
Against	42-91	6	against	String (50)	Who or what the complaint is against.
Against Entity	92-346	7	against_entity	String (255)	User who specified who or what the complaint is against.
Category	347-366	8	category	String (20)	Complaint category, such as branch or department.
Compensation Amount	367-378	9	compensation_amount	Decimal (12)	Amount of compensation the debtor received.
Conclusion	379-878	10	conclusion	String (500)	Based on the investigation, the conclusion regarding the complaint.

Date Closed	879-886	11	date_closed	DateTime (CCYYMMDD)	Date your organization closed the complaint.
Date in Admin	887-994	12	date_in_admin	DateTime (CCYYMMDD)	
Date Received	995-1002	13	date_received	DateTime (CCYYMMDD)	Date your organization received the complaint.
Deleted	1003-1003	14	deleted	String (1)	Indicates whether a user deleted the complaint.
Details	1004-1503	15	details	String (500)	Details regarding the complaint.
Dissatisfaction	1504-1504	16	dissatisfaction	String (1)	Indicates whether the debtor is dissatisfied.
Dissatisfaction Date	1505-1512	17	dissatisfaction_date	DateTime (CCYYMMDD)	Date the debtor indicated dissatisfaction.
Grievances	1513-2012	18	grievances	String (500)	List of the debtor's grievances.
Investigation Comments to Date	2013-2512	19	investigation_comments_to_date	String (500)	Details regarding the complaint investigation.
Justified Code	2513-2522	20	justified_code	String (10)	Code that identifies the complaint

					justification type.
Justified	2523-2572	21	justified	String (50)	Indicates whether the complaint is justified.
Outcome Code	2573-2582	22	outcome_code	String (10)	Code that identifies the complaint outcome type.
Outcome	2583-2632	23	outcome	String (50)	Outcome of the complaint, such as training required or disciplinary action. Selecting an outcome closes the complaint.
Owner	2633-2642	24	owner	String (10)	
Recourse Date	2643-2650	25	recourse_date	DateTime (CCYYMMDD)	Recourse approval date.
Referred by	2651-2660	26	referred_by	String (10)	Person who referred the complaint, such as third party, customer, or user.
Root Cause Code	2661-2670	27	root_cause_code	String (10)	Code that identifies the root cause type.
Root Cause	2671-2720	28	root_cause	String (50)	Root cause of the complaint.

					Number of days after receiving the complaint that you have to resolve it before breaching the SLA.
SLA Days	2721-2729	29	sla_days	Integer (9)	
Status Code	2730-2739	30	status_code	String (10)	Code that identifies the complaint status type.
Status	2740-2789	31	status	String (50)	Status of the complaint.
Type Code	2790-2799	32	type_code	String (10)	Code that identifies the complaint type.
Type	2800-2849	33	type	String (50)	Type of complaint, such as human or system error.
Filler	2850-2850	34	filler	String (1)	Filler for fixed file layout.

Placement Export File Debtor Record

Fixed record type = CD##

Excel worksheet name = Debtor

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = CD00 - CD99

File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Account	14-43	3	account	String (30)	Unique number the creditor assigned to this account.
Name	44-73	4	name	String (30)	Customer name or business name. AIM formats customer names as last name, first name, middle initial. Business names use standard formatting.
Street 1	74-201	5	street1	String (128)	Debtor's street address line 1.
Street 2	202-329	6	street2	String (128)	Debtor's street address line 2.
City	330-349	7	city	String (20)	Debtor's city.
State	350-352	8	state	String (3)	Debtor's state.
Postal Code	353-362	9	zipcode	String (10)	Debtor's postal code.
Home Phone	363-392	10	home_phone	String (30)	Debtor's home phone.
Work Phone	393-422	11	work_phone	String (30)	Debtor's work phone.
SSN	423-431	12	ssn	String (9)	Debtor's SSN.

Mail Return	432	13	mail_return	String (1)	Y = Bad address N = Good address
Other Name	433-462	14	other_name	String (30)	Debtor's other (or alias) name.
Date of Birth	463-470	15	date_of_birth	DateTime (CCYYMMDD)	Debtor's date of birth.
Job Name	471-500	16	job_name	String (30)	Name of debtor's employer.
Job Street1	501-628	17	job_street1	String (128)	Street address line 1 for debtor's employer.
Job Street2	629-756	18	job_street2	String (128)	Street address line 2 for debtor's employer
Job City, State, Postal Code	757-786	19	job_city_state_zipcode	String (30)	City, state, and postal code for debtor's employer
Spouse Name	787-816	20	spouse_name	String (30)	Name of debtor's spouse.
Spouse Job Name	817-846	21	spouse_job_name	String (30)	Name of spouse's employer.
Spouse Job Street1	847-974	22	spouse_job_street1	String (128)	Street address line 1 for spouse's employer.

Spouse Job Street2	975-1102	23	spouse_job_street2	String (128)	Street address line 2 for spouse's employer.
Spouse Job City, State, Postal Code	1103-1132	24	spouse_job_city_state_zipcode	String (30)	City, state, and postal code for spouse's employer.
Spouse Home Phone	1133-1162	25	spouse_home_phone	String (30)	Spouse's home phone.
Spouse Work Phone	1163-1192	26	spouse_work_phone	String (30)	Spouse's work phone.
Debtor ID	1193-1201	27	debtor_number	Integer (9)	Unique code that identifies the debtor.
County	1202-1251	28	county	String (50)	Debtor's county of residence.
Country	1252-1301	29	country	String (50)	Debtor's country of residence.
Attorney Name	1302-1351	30	attorney_name	String (50)	Attorney's name.
Attorney Firm	1352-1451	31	attorney_firm	String (100)	Name of attorney's firm.
Attorney Street1	1452-1579	32	attorney_street1	String (128)	Attorney's street address line 1.
Attorney Street2	1580-1707	33	attorney_street2	String (128)	Attorney's street address line 2.
Attorney City	1708-1757	34	attorney_city	String (50)	Attorney's city.

Attorney State	1758-1762	35	attorney_state	String (5)	Attorney's state
Attorney Postal Code	1763-1782	36	attorney_zipcode	String (20)	Attorney's postal code.
Attorney Phone	1783-1802	37	attorney_phone	String (20)	Attorney's phone number.
Attorney Fax	1803-1822	38	attorney_fax	String (20)	Attorney's fax number.
Attorney Notes	1823-2322	39	attorney_notes	String (500)	Attorney's notes.
ID 1	2323-2372	40	id1	String (50)	Identification number associated to a party on an account.
ID 2	2373-2422	41	id2	String (50)	Identification number associated to a party on an account.
PURN	2423-2472	42	purn	String (50)	Personal Unique Record Number. Alphanumeric code that an outside provider such as a credit bureau assigns to uniquely identify a person.
Attorney County	2473-2600	43	attorney_county	String (128)	Attorney's county.
Attorney Country	2601-2728	44	attorney_country	String (128)	Attorney's country.

Job County	2729-2778	45	job_county	String (50)	County for debtor's employer.
Job Country	2779-2828	46	job_country	String (50)	Country for debtor's employer.
Spouse Job County	2829-2878	47	spouse_job_county	String (50)	County for spouse's employer.
Spouse Job Country	2879-2928	48	spouse_job_country	String (50)	Country for spouse's employer.
Filler	2929-3000	49	Filler	String (72)	Filler for fixed file layout. Delimited expects reference.

Placement Export File Debtor Bankruptcy Record

Fixed record type = CBKP

Excel worksheet name = Bankruptcy

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = CBKP
Debtor ID	5-13	2	debtor_number	Integer (9)	Unique number assigned to each debtor record.
File Number	14-22	3	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.

Chapter	23-24	4	chapter	String (2)	Bankruptcy Chapter. Valid values are 7, 11, and 13.
Date Filed	25-32	5	date_filed	DateTime (CCYYMMDD)	Date the debtor filed bankruptcy.
Case Number	33-52	6	case_number	String (20)	Court case number.
Court District	53-132	7	court_district	String (80)	Court district where the debtor filed bankruptcy.
Court Division	133-212	8	court_division	String (80)	Division of the court where the debtor filed bankruptcy.
Court Phone	213-242	9	court_phone	String (30)	Court clerk's phone number
Court Street 1	243-370	10	court_street1	String (128)	Court's street line 1.
Court Street 2	371-498	11	court_street2	String 128	Court's street line 2.
Court City	499-548	12	court_city	String (50)	Court's city.
Court State	549-551	13	court_state	String (3)	Court's state.
Court ZIP Code	552-561	14	court_zipcode	String (10)	Court's postal code.
Trustee	562-611	15	trustee	String (50)	Trustee's name.
Trustee Street Address 1	612-739	16	trustee_street1	String (128)	Trustee's street line 1.

Trustee Street Address 2	740-867	17	trustee_street2	String (128)	Trustee's street line 2.
Trustee City	868-917	18	trustee_city	String (50)	Trustee's city.
Trustee State	918-920	19	trustee_state	String (3)	Trustee's state.
Trustee ZIP Code	921-930	20	trustee_zipcode	String (10)	Trustee's postal code.
Trustee Phone	931-960	21	trustee_phone	String (30)	Trustee's phone number.
Has341Info	961	22	three_forty_one_info_flag	String (1)	341 indicator (90 or 1).
DateTime341	962-969	23	three_forty_one_date	DateTime (CCYYMMDD)	341 date.
Location341	970-1049	24	three_forty_one_location	String (80)	341 location.
Comments	1050-1349	25	comments	String (300)	Bankruptcy comments.
Status	1350-1449	26	status	String (100)	Description of the account status.
Transmitted Date	1450-1457	27	transmit_date	DateTime (CCYYMMDD)	Date AIM transmitted the information.
Notice Received	1458-1465	28	notice_date	DateTime (CCYYMMDD)	Date the client received a notice that the customer filed for bankruptcy.
Proof of Claim	1466-1473	29	proof_filed_date	DateTime (CCYYMMDD)	Date the client sent a proof of

					claim to the court.
Discharge Date	1474-1481	30	discharge_date	DateTime (CCYYMMDD)	Date the court discharged the bankruptcy.
Dismissal Date	1482-1489	31	dismissal_date	DateTime (CCYYMMDD)	Date the court dismissed the bankruptcy.
Confirm Hearing	1490-1497	32	confirmation_hearing_date	DateTime (CCYYMMDD)	Date the court set the confirmation hearing.
Reaffirmation Filed Date	1498-1505	33	reaffirm_filed_date	DateTime (CCYYMMDD)	Date the customer filed the reaffirmation with the court.
Voluntary Date	1506-1513	34	voluntary_date	DateTime (CCYYMMDD)	Date the customer volunteered to pay off the debt.
Surrender Date	1514-1521	35	surrender_date	DateTime (CCYYMMDD)	Date the customer surrendered the item.
Auction Date	1522-1529	36	auction_date	DateTime (CCYYMMDD)	Date the auction house auctioned the surrendered item.
Reaffirmation Amount	1530-1541	37	reaffirm_amount	Decimal (12)	Amount that the customer reaffirmed to pay.

Voluntary Amount	1542-1553	38	voluntary_amount	Decimal (12)	Amount the customer volunteered to pay.
Auction Amount	1554-1565	39	auction_amount	Decimal (12)	Amount the auction house received for the surrendered item.
Auction Fee Amount	1566-1577	40	auction_fee_amount	Decimal (12)	Fee the auction house charged for auctioning the surrendered item.
Auction Amount Applied	1578-1589	41	auction_applied_amount	Decimal (12)	Amount of the auction funds applied to the account.
Secured amount	1590-1601	42	secured_amount	Decimal (12)	Amount of the debt that is secured. Chapters 11, 12, and 13 only.
Secured Plan Percent	1602-1613	43	secured_percentage	Decimal (12)	Percentage of the secured amount for which the customer remains responsible. Chapters 11, 12, and 13 only.
Unsecured Amount	1614-1625	44	unsecured_amount	Decimal (12)	Amount of the debt that is unsecured. Chapters 11, 12, and 13 only.

Unsecured Plan Percent	1626-1637	45	unsecured_percentage	Decimal (12)	Percentage of the unsecured amount for which the customer remains responsible. Chapters 11, 12, and 13 only.
Converted Chapter	1638-1639	46	converted_from_chapter	String (2)	Original bankruptcy chapter number.
Has Asset	1640	47	has_asset	String (1)	Customer has assets to secure the debt. Chapter 7 only.
Reaffirmation	1641	48	reaffirm_flag	String (1)	Indicates whether the customer reaffirmed the debt under new terms.
Reaffirmation Terms	1642-1691	49	reaffirm_terms	String (50)	Agreed upon terms of the reaffirmation.
Terms	1692-1741	50	voluntary_terms	String (50)	Terms of payment.
Surrender Method	1742-1791	51	surrender_method	String (50)	How the customer surrendered the item (for example, shipped or picked up).
Auction House	1792-1841	52	auction_house	String (50)	Name of the auction house that auctioned

					the surrendered item.
Country	1842-1969	53	country	String (128)	Country where the customer filed bankruptcy.
County	1970-2097	54	county	String (128)	County where the customer filed bankruptcy.
Filler	2098-3000	55	filler	String (903)	Filler for fixed file layout.

Placement Export File Debtor Deceased Record

Fixed record type = CDEC

Excel worksheet name = Deceased

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = CDEC
Debtor ID	5-13	2	debtor_number	Integer (9)	Unique number assigned to each debtor record.
File Number	14-22	3	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
SSN	23-31	4	ssn	String (9)	Deceased person's SSN.
First Name	32-61	5	first_name	String (30)	Deceased person's first name.
Last Name	62-91	6	last_name	String (30)	Deceased person's last name.

State	92-94	7	state	String (3)	State where deceased person resided.
Postal Code	95-104	8	postal_code	String (10)	Deceased person's postal code.
Date of Birth	105-112	9	date_of_birth	DateTime (CCYYMMDD)	Deceased person's date of birth.
Date of Death	113-120	10	date_of_death	DateTime (CCYYMMDD)	Deceased person's date of death.
Match Code	121-125	11	match_code	String (5)	Match code.
Transmitted Date	126-133	12	transmitted_date	DateTime (CCYYMMDD)	Date AIM transmitted the information.
Claim Deadline	134-141	13	claim_deadline_date	DateTime (CCYYMMDD)	Deadline for filing a claim against the customer's estate.
Date Filed	142-149	14	filed_date	DateTime (CCYYMMDD)	Date the client filed a claim against the customer's estate.
Case Number	150-169	15	case_number	String (20)	Claim case number.
Executor	170-219	16	executor	String (50)	Name of the executor of the customer's estate.
Executor Phone	220-269	17	executor_phone	String (50)	Executor's phone number.
Executor Fax	270-319	18	executor_fax	String (50)	Executor's fax number.
Executor Street1	320-447	19	executor_street1	String (128)	Executor's street address line 1.
Executor Street2	448-575	20	executor_street2	String (128)	Executor's street address line 2.

Executor State	576-578	21	executor_state	String (3)	Executor's state.
Executor City	579-678	22	executor_city	String (100)	Executor's city.
Executor Postal Code	679-688	23	executor_zipcode	String (10)	Executor's postal code.
Court City	689-738	24	court_city	String (50)	Court's city.
Court District	739-938	25	court_district	String (200)	Court district handling the customer's estate.
Court Division	939-1038	26	court_division	String (100)	Court division handling the customer's estate.
Court Phone	1039-1088	27	court_phone	String (50)	Court's phone number.
Court Street1	1089-1216	28	court_street1	String (128)	Court's street address line 1.
Court Street2	1217-1344	29	court_street2	String (128)	Court's street address line 2.
Court State	1345-1347	30	court_state	String (3)	Court's state.
Court Postal Code	1348-1362	31	court_zipcode	String (15)	Court's postal code.
Country	1363-1490	32	country	String (128)	Executor's country.
County	1491-1618	33	county	String (128)	Executor's county.
Filler	1619-3000	34	filler	String (1382)	Filler for fixed file layout.

Placement Export File Disputes Record

Fixed record type = CDIS

Excel worksheet name = Dispute

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = ADIS
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Debtor Number	14-22	3	debtor_number	Integer (9)	Unique number assigned to each debtor record.
ID	23-31	4	id	Integer (9)	
Type Code	32-41	5	type_code	String (10)	Code that identifies the dispute type.
Type	42-91	6	type	String (50)	Type of dispute, such as possible fraud or incorrect trace.
Date Received	92-99	7	date_received	DateTime (CCYYMMDD)	Dispute received date.
Referred by Code	100-109	8	referred_by_code	String (10)	Code that identifies the person who referred the dispute.
Referred by	110-159	9	referred_by	String (50)	Person who referred the dispute, such as a third party or the customer.

Details	160-659	10	details	String (500)	Details regarding the dispute.
Category Code	660-669	11	category_code	String (10)	Code that identifies the dispute category.
Category	670-719	12	category	String (50)	Dispute category, such as fraud or wrong trace.
Against Code	720-729	13	against_code	String (10)	Code that identifies the person that the dispute is against.
Against	730-779	14	against	String (50)	Person that the dispute is against, such as customer or third party.
Date Closed	780-787	15	date_closed	DateTime (CCYYMMDD)	Date your organization closed the dispute. When you close the dispute or specify an outcome, Latitude populates this box with the current date.
Recourse Date	788-795	16	recourse_date	DateTime (CCYYMMDD)	Recourse approval date.
Justified	796-805	17	justified	String (10)	Indicates whether the dispute is justified.
Outcome Code	806-815	18	outcome_code	String (10)	Code that identifies the dispute outcome type.

Outcome	816-865	19	outcome	String (50)	Outcome of the dispute, such as unable to resolve. Selecting an outcome closes the dispute.
Deleted	866-866	20	deleted	String (1)	Indicates whether a user deleted the dispute.
Proof Required	867-867	21	proof_required	String (1)	Indicates whether your organization requires proof of the dispute.
Proof Requested	868-868	22	proof_requested	String (1)	Indicates whether your organization requested proof of the dispute.
Insufficient Proof Received	869-869	23	insufficient_proof_received	String (1)	Indicates whether your organization received proof that is insufficient.
Proof Received	870-870	24	proof_received	String (1)	Indicates whether your organization received proof of the dispute.
Filler	871-1779	25	filler	String (910)	Filler for fixed file layout.

Placement Export File Equipment Record

Fixed record type = CEQP

Excel worksheet name = Equipment

Not used for AIM Receiver.

Latitude	Position	Col	Column Name	Format	Comment

Record Type	1-4	1	record_type	String (4)	Value = CEQP
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Act#	14-33	3	Act#	String (20)	Account number that the creditor assigned to this account.
Collat_desc	34-83	4	Collat_desc	String (50)	Description of the collateral item.
Lic#	84-113	5	Lic#	String (30)	License number.
Vin#	114-143	6	Vin#	String (30)	Vehicle identification number.
Yr	144-153	7	Yr	String (10)	Vehicle model year.
Mk	154-183	8	Mk	String (30)	Maker of the vehicle.
Mdl	184-203	9	Mdl	String (20)	Vehicle model.
Ser	204-223	10	Ser	String (20)	Series code that identifies the vehicle.
Color	224-243	11	Color	String (20)	Color of the vehicle.
Key_CD	244-263	12	Key_CD	String (20)	Ignition key number.
Cond	264-293	13	Cond	String (30)	Condition of the vehicle.
Loc	294-323	14	Loc	String (30)	Location of the vehicle.
Tag#	324-353	15	Tag#	String (30)	License plate number.
Dlr#	354-383	16	Dlr#	String (30)	Dealer number.

PLN_CD	384-413	17	PLN_CD	String (30)	
Repo_DT	414-428	18	Repo_DT	String (15)	Date the vehicle was repossessed.
DSP_DT	429-443	19	DSP_DT	String (15)	Disposition date.
Ins	444-473	20	Ins	String (30)	Inspection results.
Prd_Cmplt#	474-503	21	Prd_Cmplt#	String (30)	
Val	504-515	22	Val	Decimal (12)	Vehicle's fair market value.
UCC_CD	516-525	23	UCC_CD	String (10)	Uniform Commercial Code.
Fil_Dt	526-540	24	Fil_Dt	String (15)	
Fil_Loc	541-570	25	Fil_Loc	String (30)	
X_Coll	571-600	26	X_Coll	String (30)	
LN#	601-630	27	LN#	String (30)	Loan number.
Rec_Mthd_CD	631-650	28	Rec_Mthd_CD	String (20)	Code that identifies the method of recovery.
Reas_CD	651-680	29	Reas_CD	String (30)	Code that identifies the reason for recovery.
Typ_CO_CD	681-710	30	Typ_CO_CD	String (30)	
DSP_CD	711-740	31	DSP_CD	String (30)	Disposition code.
DSP_ANAL	741-770	32	DSP_ANAL	String (30)	
Recovered	771	33	Recovered	String (1)	Indicates whether the client recovered the equipment.

RecoveredDate	772-779	34	RecoveredDate	DateTime (CCYYMMDD)	Date the client recovered the equipment.
Commissionable	780	35	Commissionable	String (1)	Indicates whether the equipment is commissionable.
WhenLoaded	781-788	36	WhenLoaded	DateTime (CCYYMMDD)	Date a user added the equipment to Latitude.
equipment_id	789-797	37	equipment_id	Integer (9)	Code that identifies the equipment in Latitude.
Filler	798-3000	38	Filler	String (2203)	Filler for fixed file layout.

Placement Export File Insurance Record

Medical accounts only! You can transmit the CINS record multiple times.

Fixed record type = CINS

Excel worksheet name = Insurance

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = CINS
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Insurance ID	14-22	3	insurance_id	Integer (9)	Unique number that identifies this insurance record.

Insured Name	23-72	4	InsuredName	String (50)	Insured person's name.
Insured Street1	73-200	5	InsuredStreet1	String (128)	Insured person's street address line 1.
Insured Street2	201-328	6	InsuredStreet2	String (128)	Insured person's street address line 2.
Insured City	329-378	7	InsuredCity	String (50)	Insured person's city.
Insured State	379-381	8	InsuredState	String (3)	Insured person's state.
Insured ZIP Code	382-391	9	InsuredZip	String (10)	Insured person's postal code.
Insured Phone	392-411	10	InsuredPhone	String (20)	Insured person's phone number.
Insured Birthday	412-419	11	InsuredBirthday	DateTime (CCYYMMDD)	Insured person's birthday.
Insured Sex	420	12	InsuredSex	String (1)	Insured person's gender (M or F).
Insured Employer	421-470	13	InsuredEmployer	String (50)	Name of Insured person's employer.

Auth Pmt to Provider	471	14	AuthPmtToProvider	String (1)	Indicates whether the insurance company authorized payments to the provider.
Accept Assignment	472	15	AcceptAssignment	String (1)	Indicates whether the insurance company accepts assignments.
Employer Health Plan	473-522	16	EmployerHealthPlan	String (50)	Description of employer's health plan.
Policy Number	523-572	17	PolicyNumber	String (50)	Insurance policy number.
Patient Relation to Insured	573-622	18	PatientRelationToInsured	String (50)	Insured's relationship to the patient.
Program	623-672	19	Program	String (50)	Insurance program name.
Group Number	673-722	20	GroupNumber	String (50)	Insurance group number.
Group Name	723-772	21	GroupName	String (50)	Insurance group name.
Carrier Name	773-872	22	CarrierName	String (100)	Insurance carrier's name.

Carrier Street1	873-1000	23	CarrierStreet1	String (128)	Insurance carrier's street address line 1.
Carrier Street2	1001-1128	24	CarrierStreet2	String (128)	Insurance carrier's street address line 2.
Carrier City	1129-1178	25	CarrierCity	String (50)	Insurance carrier's city.
Carrier State	1179-1181	26	CarrierState	String (3)	Insurance carrier's state.
Carrier ZIP Code	1182-1191	27	CarrierZip	String (10)	Insurance carrier's postal code.
Carrier Doc Provider Number	1192-1221	28	CarrierDocProviderNumber	String (30)	Insurance carrier's document provider number.
Carrier Ref Doc Provider Number	1222-1251	29	CarrierRefDocProviderNumber	String (30)	Insurance carrier's reference document provider number.
Country	1252-1379	30	Country	String (128)	Insured's person's country.
County	1380-1507	31	County	String (128)	Insured's person's county.
Filler	1508-3000	32	Filler	String (1493)	Filler for fixed file layout.

Placement Export File Judgments Record

Delimited/fixed record type = CJDG

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Excel worksheet name = Judgments

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = CJDG
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Judgment Flag	14	3	JudgmentFlag	String (1)	Contains the value "U" for update.
Case Number	15-64	4	CaseNumber	String (50)	Court case number.
Judgment Amt	65-76	5	JudgmentAmt	Decimal (12)	Principal amount awarded in the judgment.
Judgment Int Award	77-88	6	JudgmentIntAward	Decimal (12)	Interest amount awarded in the judgment.
Judgment Cost Award	89-100	7	JudgmentCostAward	Decimal (12)	Costs and fees awarded in the judgment.
Judgment Attorney Cost Award	101-112	8	JudgmentAttorneyCostAward	Decimal (12)	Attorney costs awarded in the judgment.
Judgment Other Award	113-124	9	JudgmentOtherAward	Decimal (12)	Other dollar amount awarded in the judgment.

Judgment Int Rate	125-129	10	JudgmentIntRate	Decimal (5)	New interest rate awarded in the judgment.
Int From Date	130-137	11	IntFromDate	Date (CCYYMMDD)	Date the new interest rate takes effect.
Attorney Ack Date	138-145	12	AttorneyAckDate	Date (CCYYMMDD)	Date the attorney acknowledged placement of the account.
Date Filed	146-153	13	DateFiled	Date (CCYYMMDD)	Date the creditor filed the suit against the debtor.
Service Date	154-161	14	ServiceDate	Date (CCYYMMDD)	Date the court served the debtor.
Judgment Date	162-169	15	JudgmentDate	Date (CCYYMMDD)	Date the court awarded judgment.
Judgment Recorded Date	170-177	16	JudgmentRecordedDate	Date (CCYYMMDD)	Date the clerk recorded the judgment.
Date Answered	178-185	17	DateAnswered	Date (CCYYMMDD)	Date the debtor answered the judgment.
Statute Deadline	186-193	18	StatuteDeadline	Date (CCYYMMDD)	Statute of limitations deadline.
Court Date	194-201	19	CourtDate	Date (CCYYMMDD)	Court date.
Discovery Cutoff	202-209	20	DiscoveryCutoff	Date (CCYYMMDD)	Cutoff date for discovery.

Discovery Reply Date	210-217	21	DiscoveryReplyDate	Date (CCYYMMDD)	Discovery reply date.
Motion Cutoff	218-225	22	MotionCutoff	Date (CCYYMMDD)	Cutoff date for filing motions.
Arbitration Date	226-233	23	ArbitrationDate	Date (CCYYMMDD)	Arbitration date.
Last Summary Judgment Date	234-241	24	LastSummaryJudgmentDate	Date (CCYYMMDD)	Last summary judgment date.
Status	242-291	25	Status	String (50)	Status of the court case.
Service Type	292-311	26	ServiceType	String (20)	Type of service performed.
Misc Info 1	312-411	27	MiscInfo1	String (100)	Miscellaneous information.
Misc Info 2	412-511	28	MiscInfo2	String (100)	Miscellaneous information.
Remarks	512-611	29	Remarks	String (100)	Comments regarding the judgment.
Plaintiff	612-711	30	Plaintiff	String (100)	Plaintiff in the case.
Defendant	712-811	31	Defendant	String (100)	Defendant in the case.
Judgment Book	812-831	32	JudgmentBook	String (20)	Number of the local records book where the clerk recorded the judgment.

Judgment Page	832-851	33	JudgmentPage	String (20)	Page in the local records book where the clerk recorded the judgment.
Judge	852-951	34	Judge	String (100)	Judge who is presiding over the case.
Court Room	952-966	35	CourtRoom	String (15)	Court room for hearing the case.
Court Name	967-1016	36	CourtName	String (50)	Name of the court.
Court County	1017-1066	37	CourtCounty	String (50)	Court's county.
Court Street 1	1067-1194	38	CourtStreet1	String (128)	Court's street address line 1.
Court Street 2	1195-1322	39	CourtStreet2	String (128)	Court's street address line 2.
Court City	1323-1372	40	CourtCity	String (50)	Court's city.
Court State	1373-1377	41	CourtState	String (5)	Court's state.
Court Zipcode	1378-1387	42	CourtZipcode	String (10)	Court's postal code.
Court Phone	1388-1437	43	CourtPhone	String (50)	Court's phone number.
Court Fax	1438-1487	44	CourtFax	String (50)	Court's fax number.
Court Salutation	1488-1537	45	CourtSalutation	String (50)	Court's salutation.

Court Clerk First Name	1538-1587	46	CourtClerkFirstName	String (50)	Court clerk's first name.
Court Clerk Middle Name	1588-1637	47	CourtClerkMiddleName	String (50)	Court clerk's middle name.
Court Clerk Last Name	1638-1687	48	CourtClerkLastName	String (50)	Court clerk's last name.
Court Notes	1688-1937	49	CourtNotes	String (250)	Court notes.
Filler	1938-3000	50	Filler	String (1063)	Filler for fixed file layout.

Placement Export File Miscellaneous Record

Fixed record type = CMIS

Excel worksheet name = Mis

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = CMIS
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed (zero padded). Use this value for all data sent to AIM.
Account	14-43	3	account	String (30)	Account number that the creditor assigned to this account.
Title	44-73	4	title	String (30)	Title that describes the data.
The Data	74-173	5	misc_date	String (100)	Miscellaneous data.

	174-3000	6	Filler	String (2827)	Filler for fixed file layout. Delimited expects reference.
Filler					

Placement Export File Note Record

Fixed record type = CNOT

Excel worksheet name = Notes

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = CNOT
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed (zero padded). Use this value for all data sent to AIM.
Created Date	14-27	3	created_datetime	DateTime (CCYYMMDD)	Date and time a user or Latitude created the note.
Note Action	28-33	4	note_action	String (6)	Action code assigned to the note.
Note Result	34-39	5	note_result	String (6)	Result code assigned to the note.
Note Comment	40-339	6	note_comment	String (300)	Note text.
Filler	340-3000	7	Filler	String (2661)	Filler. Delimited expects reference.

Placement Export File Patient Record

Medical accounts only!

Fixed record type = CPAT

Excel worksheet name = PatientInfo

Latitude	Position	Col	Column Name	Format	Comment

Record Type	1-4	1	record_type	String (4)	Value = CPAT
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Name	14-88	3	Name	String (75)	Name of the patient.
Street1	89-216	4	Street1	String (128)	Patient's street address line 1.
Street2	217-344	5	Street2	String (128)	Patient's street address line 2.
City	345-379	6	City	String (35)	Patient's city.
State	380-381	7	State	String (2)	Patient's state.
Zip code	382-396	8	ZipCode	String (15)	Patient's postal code.
Country	397-421	9	Country	String (25)	Patient's country.
Phone	422-441	10	Phone	String (20)	Patient's phone number.
SSN	442-456	11	SSN	String (15)	Patient's social security number.
Sex	457	12	Sex	String (1)	Patient's gender.
Age	458-466	13	Age	Integer (9)	Patient's age.
Date of Birth	467-474	14	DOB	DateTime (CCYYMMDD)	Patient's date of birth.
Marital Status	475	15	MaritalStatus	String (1)	Patient's marital status.
Employer Name	476-550	16	EmployerName	String (75)	Patient's employer's name.
Work Phone	551-570	17	WorkPhone	String (20)	Patient's work phone number.
Patient Rec Number	571-600	18	PatientRecNumber	String (30)	Patient's receiving number.
Guarantor Rec Number	601-630	19	GuarantorRecNumber	String (30)	Guarantor's receiving number.

Admission Date	631-638	20	AdmissionDate	DateTime (CCYYMMDD)	Patient's admission date.
Service Date	639-646	21	ServiceDate	DateTime (CCYYMMDD)	Patient's service date.
Discharge Date	647-654	22	DischargeDate	DateTime (CCYYMMDD)	Patient's discharge date.
Facility Name	655-729	23	FacilityName	String (75)	Medical facility name.
Facility Street1	730-857	24	FacilityStreet1	String (128)	Medical facility street address line 1.
Facility Street2	858-985	25	FacilityStreet2	String (128)	Medical facility street address line 2.
Facility City	986-1020	26	FacilityCity	String (35)	Medical facility city.
Facility State	1021-1025	27	FacilityState	String (5)	Medical facility state.
Facility Zip code	1026-1040	28	FacilityZipCode	String (15)	Medical facility postal code.
Facility Country	1041-1065	29	FacilityCountry	String (25)	Medical facility country.
Facility Phone	1066-1085	30	FacilityPhone	String (20)	Medical facility phone number.
Facility Fax	1086-1105	31	FacilityFax	String (20)	Medical facility fax number.
Doctor Name	1106-1180	32	DoctorName	String (75)	Doctor's name.
Doctor Phone	1181-1200	33	DoctorPhone	String (20)	Doctor's phone number.
Doctor Fax	1201-1220	34	DoctorFax	String (20)	Doctor's fax number.
Kin Name	1221-1295	35	KinName	String (75)	Next of kin's name.

Kin Street1	1296-1423	36	KinStreet1	String (128)	Next of kin's street address line 1.
Kin Street2	1424-1551	37	KinStreet2	String (128)	Next of kin's street address line 2.
Kin City	1552-1586	38	KinCity	String (35)	Next of kin's city.
Kin State	1587-1591	39	KinState	String (5)	Next of kin's state.
Kin Zip code	1592-1606	40	KinZipCode	String (15)	Next of kin's postal code.
Kin Country	1607-1631	41	KinCountry	String (25)	Next of kin's country.
Kin Phone	1632-1651	42	KinPhone	String (20)	Next of kin's phone number.
Filler	1652-3000	43	Filler	String (1349)	Filler for fixed file layout.

Placement Export File Phone Record

Fixed record type = CUPP

Excel worksheet name = Phones

Latitude	Position	Col	Column Name	Format	Comment	
Record Type	1-4	1	record_type	String (4)	Value = CUPP	
Debtor ID	5-13	2	debtor_number	Integer (9)	Unique number assigned to each de... this value for all data sent to AIM.	
File Number	14-22	3	file_number	Integer (9)	Unique number assigned to each ac... padded). Use this value for all data ...	
Relationship	23-72	4	relationship	String (50)	Debtor's relationship to the accoun...	
Phone Type ID	73	5	phone_type_id	Integer (1)	1 = Home 2 = Work 3 = Cell	4 = Fax 5 = Spouse home 6 = Spouse work

Phone Status ID	74	6	phone_status_id	Integer (1)	0 = Unknown (blank for Excel) 1 = Bad 2 = Good AIM sends the initial status with the phone record. If only the phone sta doesn't send the status in a demogr sends bad phone numbers as a 'blar the CUPH record.
On Hold	75	7	on_hold	Integer (1)	Indicates whether phone is on hold 0 = Not on hold 1 = On hold
Phone Number	76-105	8	phone_number	String (30)	Debtor phone number.
Phone Extension	106-115	9	phone_ext	String (10)	Phone extension.
Phone Name	116-145	10	phone_name	String (30)	Name for phone record.
Source	146-175	11	source	String (30)	Source for phone information: USER = User added manually CONVERSION = Converted from old SYNC = Matched from another linke
Filler	176-3000	12	filler	String (2825)	Filler for fixed file layout. Delimited

Placement Export File Trailer Record

Fixed record type = CTRL

Excel and XML are not used.

Latitude	Position	Format	Comment
Record Type	1-4	String (4)	Value = CTRL
Agency	5-34	String (30)	Your unique agency number or alpha code.
Agency Name	35-84	String (50)	Your agency name.

Records	85-94	Integer (10)	Number of records in this file, excluding the trailer record.
Placement Total	95-106	Decimal (12)	Aggregate total of all money columns for all CACT records.
Created Date	107-114	Date (CCYYMMDD)	File creation date.
Filler	115-3000	String (2886)	Filler for fixed file layout.

Recalls Export File Layout

Recalls Export File Layout

The recall export file contains recall information to notify agencies and attorneys that AIM is recalling the accounts.

Recall types

Recall files can contain the following recall types:

- **Pending:** Pending recalls allow the outside agency time to generate objections before AIM issues a final recall.

- **Final:** AIM recalls accounts included in final recall files immediately.

Record types

Delimited and fixed files contain the following record types:

- **CPEN:** Pending recall record.

- **CFIN:** Final recall record.

- **CTRL:** Trailer record that indicates the total number of accounts AIM is recalling

Recalls Export File Naming Convention

Delimited or Fixed: AIMYYYYMMDDHHMMSS_####.CRCL

Excel: AIMYYYYMMDDHHMMSS_####.CRCL.XLS

Where #### represents the agency code assigned to the agency to receive the business.

Recalls Export File Record

Fixed record type = CPEN or CFIN

Excel worksheet name = Recall

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Values: CPEN = Pending recall CFIN = Final recall
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Account	14-43	3	account	String (30)	Account number that the creditor assigned to this account.
Recall Reason	44-46	4	recall_reason	String (3)	Recall reason code.
Objection Date	47-54	5	objection_date	DateTime (CCYYMMDD)	Last date the agency or attorney objected the account recall. If none, the value is "19000101."
Filler	55-102	6	filler	String (48)	Filler for fixed file layout.

Recalls Export File Trailer Record

Fixed record type = CTRL

Excel and XML are not used.

Latitude	Position	Format	Comment
Record Type	1-4	String (4)	Value = CTRL
Agency	5-34	String (30)	Your unique agency number.
Agency Name	35-84	String (50)	Your agency name.
Records	85-94	Integer (10)	Number of records in this file, excluding the trailer record.

Created Date	95-102	DateTime (CCYYMMDD)	File creation date.

Request and Response Export File Layout

Request and Response Export File Layout

The request and response export file contains requests for account placements and recalls created in Latitude, and responses to those requests.

Request and Response Export File Naming Convention

Fixed: AIMYYYYMMDDHHMMSS_####.CRAR

Where #### represents the ID assigned to the agency to receive the business.

Request and Response Export File Record

Fixed record type = CRAR

Excel worksheet name = Request and Response

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = CRAR
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Request Code	14-18	3	request_code	String (5)	Code that identifies the type of request.
Response Code	19-23	4	response_code	String (5)	Code that identifies the type of response.
Request ID	24-32	5	request_id	Integer (9)	Unique identifier of the request.
Text	33-532	6	text	String (500)	If needed, extra space to describe the request. Otherwise, filler for fixed file layout.

Request and Response Export File Trailer Record

Fixed record type = CTRL

Excel and XML are not used.

Latitude	Position	Format	Comment
Record Type	1-4	String (4)	Value = CTRL
Agency	5-34	String (30)	Your unique agency number.
Agency Name	35-84	String (50)	Your agency name.
Records	85-94	Integer (10)	Number of records in this file, excluding the trailer record.
Created Date	95-102	DateTime (CCYYMMDD)	File creation date.
Filler	103 - 532	String (430)	Filler for fixed file layout.

YGC Export File Layouts

YGC Export File Layouts

YGC export files contain information for attorneys that use the You've Got Claims (YGC) file format.

YGC Export Record Types

The following records types are available for export from AIM. AIM includes them in separate lines within each YGC export file. The first two characters of each line indicate the record type. AIM only supports the primary debtor and the first two co-debtors for debtor information records 04, 05, 06, 07, 08, 09, 15, 16, and 19.

AIM doesn't include the following record types as part of the AIM YGC export process:

- 11 (Invoices)
- 17 (Arbitration)
- 18 (Reconciliation)
- 20 (Balance/Interest Update)
- 21 (Financial Discrepancy)

Record Type	Description	File Type

01	New Account Information	Placement (CPLC)
02	Primary Debtor Information	Placement (CPLC), Demographic CDEM
03	Alternate Debtor Information	Placement (CPLC), Demographic CDEM
04	Employment Information	Placement (CPLC)
05	Asset Information	Placement (CPLC)
06	Miscellaneous Information	Placement (CPLC)
07	Legal Information	Placement (CPLC)
08	Caption	Placement (CPLC)
09	Message (Notes)	Placement (CPLC), Recall (CRCL), Miscellaneous (CMIS), Notes (CNOT)
12	Direct Payments	Payment (CPAY)
15	Probate (Deceased Info)	Placement (CPLC), Deceased (CDEC)
16	Asset Information	Placement (CPLC)
19	Bankruptcy Information	Placement (CPLC), Bankruptcy (CBKP)
22	Historical Address	Placement (CPLC)
23	Historical Phone	Placement (CPLC)
24	Historical Payment Info	Placement (CPLC)

YGC Assets Export File Layout

YGC Assets Export File Layout

The YGC asset export file contains asset information that users updated in Latitude after AIM placed the accounts. Attorneys can use these files to update account information in their system.

YGC Asset Export File Naming Convention

Fixed: AIMYYYYMMDDHHMMSS_####.CAST

Where #### represents the ID or YGC ID assigned to the attorney holding the accounts.

YGC Export Record Type 05 - Assets

This record contains debtor bank account information and non-auto or non-real estate asset information for a previous post-dated transaction (ACH or paper draft) that users added in Latitude. You can submit a record for each of the first three debtors on the account (the primary and the first two co-debtors). AIM only supports the primary debtor and the first two co-debtors for this information.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 05.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Blank	Char	15	33	47
FORW_ID	You've Got Claims ID in Latitude.	Char	10	48	57
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	58	67
FILLER	Currently a free field	Char	20	68	87
BANK_NAME	Name of the debtor's bank.	Char	30	88	117
BANK_STREET	Bank's street address.	Char	30	118	147
BANK_CSZ	Bank's city, state, and postal code, formatted as City ST Zip or City,ST Zip. For example, Linden NJ 07036 or Linden,NJ 07036.	Char	30	148	177
BANK_ATTN	Contact name for the bank.	Char	30	178	207
BANK_PHONE	Bank's phone number. It can accommodate separators for the area code and exchange.	Char	15	208	222
BANK_FAX	Bank's fax number. It can accommodate separators for the area code and exchange.	Char	15	223	237

BANK_ACCT	Debtor's bank account number.	Char	34	238	271
MISC_ASSET1	Non-land or non-automobile asset like a stock portfolio. A receiver can send a Record 46 to supply physical asset information. If this field contains a value, set BANK_NO to 1.	Char	25	272	296
MISC_ASSET2	Non-land or non-automobile asset like a stock portfolio. A receiver can send a Record 46 to supply physical asset information. If this field contains a value, set BANK_NO to 1.	Char	25	297	321
MISC_ASSET3	Non-land or non-automobile asset like a stock portfolio. A receiver can send a Record 46 to supply physical asset information. If this field contains a value, set BANK_NO to 1.	Char	25	322	346
MISC_PHONE	Phone number relating to the miscellaneous asset. If this field contains a value, set BANK_NO to 1.	Char	15	347	361
BANK_NO	Debtor's bank number. It can contain up to three bank records. Valid values are: 1, 2, or 3. For example, Record 05 for the debtor's checking account can have BANK_NO = 1 and Record 05 for the debtor's savings account can have BANK_NO = 2. If you send a record 05 with the same BANK_NO as a previous record 05 for the same account, the second record overwrites the first. If you have a miscellaneous asset described in this record, this value must be 1.	Numeric	3	362	364
BANK_CNTRY	Standard code for the bank's country.	Char	3	365	367

YGC Bankruptcy Export File Layout

YGC Bankruptcy Export File Layout

The YGC bankruptcy export file contains bankruptcy information that users updated in Latitude after AIM placed the accounts. Attorneys can use these files to update account information in their system.

YGC Bankruptcy Export File Naming Convention

Fixed: AIMYYYYMMDDHHMMSS_####.CBKP

Where #### represents the ID or YGC ID assigned to the attorney holding the accounts.

YGC Export Record Type 19 - Bankruptcy

This record contains bankruptcy information. AIM only supports the primary debtor and the first two co-debtors for this information.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 19.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Blank.	Char	15	33	47
FORW_ID	You've Got Claims ID.	Char	10	48	57
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	58	67
DBTR_NUM	Identifies which debtor on the account is filing for bankruptcy. Valid values are: 1 = Primary debtor 2 = Second debtor 3 = Third debtor The last record (02 or 31) determines the primary debtor. The last record (03 or 33) determines the second and third debtors.	Numeric	3	68	70
CHAPTER	Chapter within the bankruptcy code, typically 7 or 13 for individuals.	Char	3	71	73
BK_FILENO	Court-issued case number for the bankruptcy.	Char	15	74	88
LOC	Location where the debtor filed bankruptcy. You can use this field for the court jurisdiction. There is no format restriction.	Char	40	89	128
FILED_DATE	Date the debtor filed bankruptcy.	Date	8	129	136
DSMIS_DATE	Date the court dismissed the bankruptcy.	Date	8	137	144
DSCHG_DATE	Date the court issued a discharge for the bankruptcy. The discharge relieves the	Date	8	145	152

	debtor of personal liability aside from the collateral.				
CLOSE_DATE	Date the court adjudicated the case.	Date	8	153	160
CNVRT_DATE	Date the court converted the bankruptcy from one Chapter to another, typically from 13 to 7.	Date	8	161	168
MTG341_DATE	Date the initial meeting took place between creditors and debtors, typically 30 days after the filed date.	Date	8	169	176
MTG341_TIME	Time of day the initial meeting took place between creditors and debtors.	Char	8	177	184
MTG341_LOC	Location where the initial meeting took place between creditors and debtors.	Char	40	185	224
JUDGE_INIT	Bankruptcy judge's initials.	Char	3	225	227
REAF_AMT	Amount the debtor agrees to pay in full; the reaffirmation survives the bankruptcy.	Numeric	14.2	225	241
REAF_DATE	Date the debtor signed the reaffirmation.	Date	8	242	249
PAY_AMT	Periodic payment in a Chapter 11 or 13 bankruptcy, or a lump sum payment of a Chapter 7 bankruptcy.	Numeric	14.2	250	263
PAY_DATE	Date the creditor and debtor agreed on the payment arrangement.	Date	8	264	271
CONF_DATE	Date the judge approved the payment plan.	Date	8	272	279
CURE_DATE	Date the debtor paid all arrearages, fees, and interest.	Date	8	280	287

YGC Deceased Export File Layout

YGC Deceased Export File Layout

The YGC deceased export file contains bankruptcy information that users updated in Latitude after AIM placed the accounts. Attorneys can use these files to update account information in their system.

YGC Deceased Export File Naming Convention

Fixed: AIMYYYYMMDDHHMMSS_####.CDEC

Where #### represents the ID or YGC ID assigned to the attorney holding the accounts.

YGC Export Record Type 15 - Deceased

This record reports that the deceased debtor has an estate from which the client can collect debt. AIM only supports the primary debtor and the first two co-debtors for this information.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 15.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Blank.	Char	15	33	47
FORW_ID	You've Got Claims ID.	Char	10	48	57
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	58	67
DBTR_NUM	Identifies which debtor on the account is filing for bankruptcy. Valid values are: 1 = Primary debtor 2 = Second debtor 3 = Third debtor The last record (02 or 31) determines the primary debtor. The last record (03 or 33) determines the second and third debtors.	Numeric	3	68	70
DOD	Date the debtor died.	Date	8	71	78
PRB_CASE_NO	Court-issued case number.	Char	15	79	93
PRB_ST	State abbreviation of the debtor's residence.	Char	2	94	95
PRB_CTY	County name of the debtor's residence.	Char	20	96	115
PRB_CRT	Name of the court where the person handling the estate filed the probate. There is no format restriction.	Char	30	116	145

PRB_DATE	Date the person handling the estate filed the probate.	Date	8	146	153
PRB_EXP	Last date on which the client can file claims against the estate.	Date	8	154	161
REP_NAME	Cull name of the person handling the estate.	Char	40	162	201
REP_STRT1	Personal representative's street address line 1.	Char	40	202	241
REP_STRT2	Overflow field for REP_STRT1.	Char	40	242	281
REP_CITY	Personal representative's city.	Char	30	282	311
REP_ST	Personal representative's state.	Char	2	312	313
REP_ZIP	Personal representative's postal code, which can include the four-digit extension.	Char	10	314	323
REP_PHONE	Personal representative's phone number.	Char	20	324	343
ATTY_NAME	Estate attorney's full name.	Char	40	344	383
ATTY_FIRM	Estate attorney's law firm.	Char	40	384	423
ATTY_STRT1	Estate attorney's street address line 1.	Char	40	424	463
ATTY_STRT2	Overflow field for ATTY_STRT1.	Char	40	464	503
ATTY_CITY	Estate attorney's city.	Char	30	504	533
ATTY_ST	Estate attorney's state.	Char	2	534	535
ATTY_ZIP	Estate attorney's postal code, which can include the four-digit extension.	Char	10	536	545
ATTY_PHONE	Estate attorney's phone number.	Char	20	546	565
REP_CNTRY	Personal representative's country.	Char	3	566	568
ATTY_CNTRY	Estate attorney's country.	Char	3	569	571

YGC Demographics Export File Layout

YGC Demographics Export File Layout

The YGC demographic export file contains demographic information that users updated in Latitude after AIM placed the accounts. Attorneys can use these files to update account information in their system.

YGC Demographics Export File Naming Convention

Fixed: AIMYYYYMMDDHHMMSS_####.CDEM

Where #### represents the ID or YGC ID assigned to the attorney holding the accounts.

YGC Export Record Type 02 - Demographics (Primary Debtor)

This record identifies the primary debtor on the account (debtor 0) and significant legal events.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 02.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Blank	Char	15	33	47
FORW_ID	You've Got Claims ID in Latitude.	Char	10	48	57
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	58	67
D1_NAME	Primary debtor's name. The format is Lastname/Firstname.	Char	30	68	97
D1_SALUT	Code for the salutation. Valid values are: 1 = Mr. 2 = Mrs. 3 = Ms. 4 = Mr. & Mrs. 5 = Dr. 6 = Capt. 7 - 9 = Gentlemen	Numeric	1	98	98
D1_ALIAS	Primary debtor's alias name. The format is Lastname/Firstname.	Char	25	99	123
D1_STREET	Primary debtor's street address.	Char	25	124	148

D1_CS	Primary debtor's city and state, formatted as City ST or City,ST. For example, Linden NJ or Linden,NJ. This field must contain a value to display the city and state in the account detail page in DataLink.	Char	23	149	171
D1_ZIP	Primary debtor's postal code, which can include the four-digit extension without the hyphen.	Char	9	172	180
D1_PHONE	Primary debtor's phone number. It can accommodate separators for the area code and exchange.	Char	12	181	192
D1_FAX	Primary debtor's fax number. It can accommodate separators for the area code and exchange.	Char	12	193	204
D1_SSN	Primary debtor's social security number. It can accommodate hyphens.	Char	15	205	219
RFILE	Code common to a set of accounts for the same debtor. It allows you to work a parent account instead of each individual account.	Char	8	220	227
D1_DOB	Primary debtor's date of birth.	Date	8	228	235
D1_DL	Primary debtor's driver's license number.	Char	17	236	252
D1_STATE	Primary debtor's state abbreviation, which should match the one in D1_CS. If this field contains a value, the D1_CITY and D1_CS fields must contain a value also in order to display the city and state in the account detail page in DataLink.	Char	3	253	255
D1_MAIL	If the delivery service returned the suit papers, this value is "Y."	Char	1	256	256
SERVICE_D	Date court served the suit.	Date	8	257	264
ANSWER_DUE_D	Date the debtor's response to the suit is due, typically 30 days after the service date.	Date	8	265	272
ANSWER_FILE_D	Date the clerk filed the debtor's response.	Date	8	273	280

DEFAULT_D	Date the creditor requests a default judgment for a debtor who doesn't appear in court by ANSWER_DUE_D.	Date	8	281	288
TRIAL_D	Court-assigned date for the debtor to stand trial. For small-claims court, this date is the same as ANSWER_DUE_D.	Date	8	289	296
HEARING_D	Date of the latest hearing on a motion filed by either party.	Date	8	297	304
LIEN_D	Date the creditor filed a lien against a debtor's property.	Date	8	305	312
GARN_D	Date the court established garnishment against the debtor's wages.	Date	8	313	320
SERVICE_TYPE	Method used to serve the papers. Valid values are: PER = Personal CER = Certified Mail SUB = Sub-service POS = Posting (left at door) FIR = First Class Mail	Char	4	321	324
D1_STRT2	Overflow field for D1_STREET.	Char	25	325	349
D1_CITY	Primary debtor's city. If this field contains a value, the D1_CS and D1_STATE fields must contain a value in order to display the city and state in the account detail page in DataLink.	Char	30	350	379
D1_CELL	Primary debtor's cell phone number. It can accommodate separators for the area code and exchange.	Char	12	380	391
SCORE_FICO	Fair Isaac credit score.	Numeric	3	392	394
SCORE_COLLECT	Creditor-calculated score.	Numeric	3	395	397
SCORE_OTHER	Creditor-calculated score.	Numeric	3	398	400
D1_CNTRY	Standard code for the debtor's country.	Char	3	401	403

D1_STREET_LONG	Primary debtor's full street address line 1. It's used for systems that can hold longer values. It should be the same value as D1_STREET + D1_STRT2. Use this field with D1_STREET in case your receivers cannot yet accept this field.	Char	50	404	453
D1_STREET2_LONG	Overflow field for D1_STREET_LONG.	Char	50	454	503

YGC Export Record Type 03 - Demographics (Alternate Debtor)

This record identifies alternate debtors on the account (debtors 1 and 2), such as a co-signer. AIM only supports the first two co-debtors for this information.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 03	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Blank	Char	15	33	47
FORW_ID	You've Got Claims ID in Latitude.	Char	10	48	57
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	58	67
D2_NAME	Name of the second debtor or co-signer. The format is Lastname/Firstname.	Char	25	68	92
D2_STREET	Second debtor's street address.	Char	25	93	117
D2_CSZ	Second debtor's city, state, and postal code. The format is City ST Zip or City,ST Zip. For example, Linden NJ 07036 or Linden,NJ 07036.	Char	25	118	142
D2_PHONE	Second debtor's phone number. It can accommodate separators for the area code and exchange.	Char	15	143	157
D2_SSN	Second debtor's social security number. It can accommodate hyphens.	Char	15	158	172
D3_NAME	Name of the third debtor or co-signer. The format is Lastname/Firstname.	Char	25	173	197

D3_STREET	Third debtor's street address.	Char	25	198	222
D3_CSZ	Third debtor's city, state, and postal code. The format is City ST Zip or City,ST Zip. For example, Linden NJ 07036 or Linden,NJ 07036.	Char	25	223	247
D3_PHONE	Third debtor's phone number. It can accommodate separators for the area code and exchange.	Char	15	248	262
D3_SSN	Third debtor's social security number. It can accommodate hyphens.	Char	15	263	277
D2_DOB	Second debtor's date of birth.	Date	8	278	285
D3_DOB	Third debtor's date of birth.	Date	8	286	293
D2_DL	Second debtor's driver's license number.	Char	17	294	310
D3_DL	Third debtor's driver's license number.	Char	17	311	327
D2_CNTRY	Standard code for the second debtor's country.	Char	3	328	330
D3_CNTRY	Standard code for the third debtor's country.	Char	3	331	333
D2_STREET_LONG	Second debtor's full street address line 1. It's used for systems that can hold longer values. Use this field with D2_STREET in case your receivers cannot yet accept this field.	Char	50	334	383
D2_STREET2_LONG	Overflow field for D2_STREET_LONG.	Char	50	384	433
D3_STREET_LONG	Third debtor's full street address line 1. It's used for systems that can hold longer values. Use this field with D3_STREET in case your receivers cannot yet accept this field.	Char	50	434	483
D3_STREET2_LONG	Overflow field for D3_STREET_LONG.	Char	50	484	533

YGC Judgments Export File Layout

YGC Judgments Export File Layout

The YGC judgment export file contains judgment information that users updated in Latitude after AIM placed the accounts. Attorneys can use these files to update account information in their system.

YGC Judgments Export File Naming Convention

Fixed: AIMYYYYMMDDHHMMSS_####.CJDG

Where #### represents the YGC ID assigned to the attorney holding the accounts.

YGC Export Record Type 07 - Judgments

This record reports a suit filed against a debtor, including the post-judgment interest rate. If the JUDG_PRIN field has a value, it indicates that the court awarded a judgment.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 07.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Internal file number of the receiver (agency or law firm) working the account.	Char	15	33	47
FORW_ID	You've Got Claims ID in Latitude.	Char	10	48	57
FIRM_ID	Contains the YGC ID for the attorney record in AIM (aim_agency.alphacode)	Char	10	58	67
CRT_COUNTY	County where the creditor filed the suit against the debtor.		20	68	87
CRT_DESIG	Full name of the court (for example, Gwinnett County State Court, THE NINTH JUDICIAL CIRCUIT).	Char	30	88	117
CRT_TYPE	Brief description of the court (for example, Superior, Supreme, Circuit).	Char	15	118	132
SHER_NAME	Sheriff's name.	Char	25	133	157
SHER_NAME2	Sheriff's name.	Char	25	158	182
SHER_STREET	Sheriff's street address.	Char	25	183	207
SHER_CSZ	Sheriff's city, state, and postal code.	Char	25	208	221
SUIT_AMT	Dollar amount requested in the suit.	Numeric	14.2	222	235

CNTRCT_FEE	Contract fee. It's dictated in the credit contract up front and added to the principal from which the receiving attorney can take a commission.	Numeric	14.2	236	249
STAT_FEE	Statutory fee awarded to the attorney only, as determined by the debtor state.	Numeric	14.2	250	264
DOCKET_NO	Initial number assigned to the suit.	Char	15	265	276
JDGMNT_NO	Judgment number. Depending on the state where the creditor filed the suit, the court may assign a new number upon judgment.	Char	12	277	288
BKCY_NO	Court-issued case number for the bankruptcy.	Char	12	289	296
SUIT_DATE	Date the creditor filed the suit.	Date	8	297	304
JDGMNT_DATE	Date the clerk recorded the judgment.	Date	8	305	318
JDGMNT_AMT	Dollar amount awarded in the judgment.	Numeric	14.2	319	332
JUDG_PRIN	Principal amount of the judgment.	Numeric	14.2	333	346
PREJ_INT	Dollar amount of the interest due before the court rendered judgment.	Numeric	14.2	347	360
JDG_COSTS	Sum of the costs to the sender to carry the suit forward, such as attorney fees.	Numeric	14.2	361	374
ADJUSTMENT	Difference between what the creditor requested in the suit and the judgment amount.	Numeric	14.2	375	377
SHER_CNTRY	Sheriff's country.	Char	3	378	380

YGC Miscellaneous Extra Data Export File Layout

YGC Miscellaneous Extra Data Export File Layout

The YGC miscellaneous extra data export file contains miscellaneous data that users updated in Latitude after AIM placed the accounts. Attorneys can use these files to update account information in their system.

YGC Miscellaneous Extra Data Export File Naming Convention

Fixed: AIMYYYYMMDDHHMMSS_####.CMIS

Where #### represents the ID or YGC ID assigned to the attorney holding the accounts.

YGC Export Record Type 06 - Miscellaneous Extra Data

This record reports miscellaneous extra data. AIM only supports the primary debtor and the first two co-debtors for this information.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 09.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Blank.	Char	15	33	47
FORW_ID	You've Got Claims ID in Latitude.	Char	10	48	57
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	58	67
PDATE	Message sent date.	Date	8	68	75
PCODE	Value = *CC:W122	Char	8	76	83
PCMT	Value = Miscellaneous Extra Data: TITLE=####|DATA=#### (where #### represents the new miscellaneous extra data information).	Char	1024	84	1107

YGC Notes Export File Layout

YGC Notes Export File Layout

The YGC notes export file contains notes that users updated in Latitude after AIM placed the accounts. System notes don't generate note export files. Attorneys can use these files to update account information in their system.

YGC Notes Export File Naming Convention

Fixed: AIMYYYYMMDDHHMMSS_####.CNOT

Where #### represents the ID or YGC ID assigned to the attorney holding the accounts.

YGC Export Record Type 09 - Notes

This record reports status updates and notes to attorneys. Include a PCODE to identify the update. Examples of status updates are direct payment, suit filed, account refused, judgment issued, and account closed.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 09.	Char	2	1	2

FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Blank.	Char	15	33	47
FORW_ID	You've Got Claims ID in Latitude.	Char	10	48	57
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	58	67
PDATE	Message sent date.	Date	8	68	75
PCODE	Type of status update. Some codes trigger changes to the account in the DataLink.	Char	8	76	83
PCMT	Comment or description. Include a CLRF after the last character so you don't have to right-pad with spaces to fill 1024 characters.	Char	1024	84	1107

YGC Payments Export File Layout

YGC Payments Export File Layout

The YGC payment export file contains payments and adjustments that users updated in Latitude after AIM placed the accounts. Attorneys can use these files to update account balance information in their system.

YGC Payments Export File Naming Convention

Fixed: AIMYYYYMMDDHHMMSS_####.CPAY

Where #### represents the ID or YGC ID assigned to the attorney holding the accounts.

YGC Export Record Type 12 - Payments

This record reports a direct payment to the sender instead of the firm listed in Latitude.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 12	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Blank	Char	15	33	47
FORW_ID	You've Got Claims ID in Latitude.	Char	10	48	57

FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	58	67
DP_DATE	Date the debtor made a direct payment.	Date	8	68	75
DP_CMT	Comment describing the payment, such as "REVERSAL/NSF" or "Payment."	Char	20	76	95
DP_MERCH	Payment in the form of returned merchandise.	Numeric	14.2	96	109
DP_CASH	Cash payment made directly to the sender or creditor.	Numeric	14.2	110	123
DP_NOFEE	Payment amount received before sending a demand letter; thus the agency doesn't owe the firm a fee.	Numeric	14.2	124	137

YGC Placements Export File Layout

YGC Placements Export File Layout

The YGC placement export file contains new accounts to place with attorneys. This file contains records that pertain to account placement information.

YGC Placements Export File Naming Convention

Fixed: AIMYYYYMMDDHHMMSS_####.CPLC

Where #### represents the ID or YGC ID assigned to the attorney to receive the accounts.

YGC Export Record Type 01 - New Account

This record identifies the creditor and current owner of the debt and establishes the current financial state of the debt. AIM requires it to create an account.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 01.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Blank	Char	15	33	47
FORW_ID	You've Got Claims ID in Latitude. Identification code of the sender (client) placing the account. ACC assigns this ID. Typically, it's a 2-character state code followed by a 1- to 3-digit number (for example, NJ750). It can also end with a subaccount extension to distinguish accounts by	Char	10	48	57

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	type or portfolio (for example, OZ12.MED and OZ12.AUTO).				
FIRM_ID	YGC ID for the attorney record in AIM. Identification code of the receiver (agency/law firm) working the account. ACC assigns this ID to the receiver; however, the sender determines who is to receive the account. Typically, it's a 2-character state code followed by a 1-to 3-digit number (for example, NJ750). It can also end with a subaccount extension to distinguish accounts by type or portfolio (for example, OZ12.MED and OZ12.AUTO).	Char	10	58	67
DATE_FORW	Date AIM sent the account to the receiver to work, regardless of when the attorney uploaded the account to You've Got Claims.	Date	8	68	75
LAW_LIST	Previous bonding information - Blank.	Char	4	76	79
COMM	Commission percentage that the sender determined the receiver earns. AIM doesn't format this field.	Char	4	80	83
SFEE	If a creditor files a suit against the debtor, the percentage the receiver earns. AIM doesn't format this field.	Char	4	84	87
ORIG_CLAIM	Dollar amount of principal due.	Numeric	14.2	88	101
ORIG_INT	Dollar amount of accrued interest.	Numeric	14.2	102	115
ORIG_INT_D	Last day of the accrual period.	Date	8	116	123
RATES_PRE	Interest rate defined in the contract between the creditor and debtor, in decimal form. For example, if the interest rate is 19.5 percent, this value is ".1950."	Numeric	5.4	124	128
RATES_POST	Upon judgment, the interest rate applied as dictated by the debtor state, in decimal form. For example, if the interest rate is 19.5 percent, this value is ".1950."	Numeric	5.4	129	133
CRED_NAME	Company name of either the original creditor, debt purchaser, or collection agency.	Char	25	134	158

CRED_NAME2	Overflow field for CRED_NAME.	Char	25	159	183
CRED_STREET	Street address of company in CRED_NAME.	Char	25	184	208
CRED_CS	City and state of company in CRED_NAME. Format this field as City ST or City,ST. For example, Linden NJ or Linden,NJ.	Char	15	209	223
CRED_ZIP	Creditor's postal code. It can accommodate the four-digit extension without the hyphen.	Char	9	224	232
DEBT_BAL	Total amount the debtor owes, excluding interest. It equals ORIG_CLAIM + CNTRCT_FEE + STAT_FEE + JDG_COSTS, where the last three fields are from a previous legal action defined in Record 07.	Numeric	14.2	233	246
CTYPE	User-defined. Suggested codes are: ARB = Arbitration MED = Medical CARD = Credit Card LOAN = loan	Char	4	247	250
DATE_LPAY	Date the creditor received the last payment.	Date	8	251	258
AMT_LPAY	Dollar amount of the last payment to the creditor.	Numeric	14.2	259	272
DATE_OPEN	Typically, the date the debtor opened the credit card account.	Date	8	273	280
CHRG_OFF_D	Date the creditor writes the uncollectible debt off its books.	Date	8	281	288
CHRG_OFF_A	Typically, the same as ORIG_CLAIM.	Numeric	14.2	289	302
PURCHASE_D	If an agency purchased this debt, the date of purchase.	Date	8	303	310
ORIG_CRED	If an agency purchased this debt or the sender is a collection agency, the name of the original creditor company.	Char	30	311	340
ORIG_CRED2	Overflow field for ORIG_CRED.	Char	30	341	370

PORT_ID	Typically, pertains to purchased debt and holds the number assigned to the batch of accounts purchased. Customer code in Latitude.	Char	20	371	390
CRED_CNTRY	Standard code for the creditor's country.	Char	3	391	393
LPAY_ISS_D	Date the issuer received the last payment.	Date	8	394	401
LPAY_ISS_AMT	Amount of the last payment the issuer received.	Numeric	14.2	402	415
MEDIA	Indicates whether the sender has media to support a lawsuit. It is up to the receiver to determine the type of media required, at which time they send a request. Valid values are: Y = Yes N = No	Char	1	416	416
DELINQ_D	Date of delinquency.	Date	8	417	424
ACCEL_D	Date of acceleration.	Date	8	425	432
REPO_D	Date of repossession.	Date	8	433	440
SALE_D	Sale date.	Date	8	441	448
MATUR_D	Maturity date.	Date	8	449	456
SOL_START_D	Statutes of limitations start date that the sender calculated.	Date	8	457	464
SOL_END_D	Statutes of limitations end date that the sender calculated.	Date	8	465	472

YGC Export Record Type 02 - Demographics (Primary Debtor)

This record identifies the primary debtor on the account (debtor 0) and significant legal events.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 02.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32

MASCO_FILE	Blank	Char	15	33	47
FORW_ID	You've Got Claims ID in Latitude.	Char	10	48	57
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	58	67
D1_NAME	Primary debtor's name. The format is Lastname/Firstname.	Char	30	68	97
D1_SALUT	Code for the salutation. Valid values are: 1 = Mr. 2 = Mrs. 3 = Ms. 4 = Mr. & Mrs. 5 = Dr. 6 = Capt. 7 - 9 = Gentlemen	Numeric	1	98	98
D1_ALIAS	Primary debtor's alias name. The format is Lastname/Firstname.	Char	25	99	123
D1_STREET	Primary debtor's street address.	Char	25	124	148
D1_CS	Primary debtor's city and state, formatted as City ST or City,ST. For example, Linden NJ or Linden,NJ. This field must contain a value to display the city and state in the account detail page in DataLink.	Char	23	149	171
D1_ZIP	Primary debtor's postal code, which can include the four-digit extension without the hyphen.	Char	9	172	180
D1_PHONE	Primary debtor's phone number. It can accommodate separators for the area code and exchange.	Char	12	181	192
D1_FAX	Primary debtor's fax number. It can accommodate separators for the area code and exchange.	Char	12	193	204
D1_SSN	Primary debtor's social security number. It can accommodate hyphens.	Char	15	205	219

RFILE	Code common to a set of accounts for the same debtor. It allows you to work a parent account instead of each individual account.	Char	8	220	227
D1_DOB	Primary debtor's date of birth.	Date	8	228	235
D1_DL	Primary debtor's driver's license number.	Char	17	236	252
D1_STATE	Primary debtor's state abbreviation, which should match the one in D1_CS. If this field contains a value, the D1_CITY and D1_CS fields must contain a value also in order to display the city and state in the account detail page in DataLink.	Char	3	253	255
D1_MAIL	If the delivery service returned the suit papers, this value is "Y."	Char	1	256	256
SERVICE_D	Date court served the suit.	Date	8	257	264
ANSWER_DUE_D	Date the debtor's response to the suit is due, typically 30 days after the service date.	Date	8	265	272
ANSWER_FILE_D	Date the clerk filed the debtor's response.	Date	8	273	280
DEFAULT_D	Date the creditor requests a default judgment for a debtor who doesn't appear in court by ANSWER_DUE_D.	Date	8	281	288
TRIAL_D	Court-assigned date for the debtor to stand trial. For small-claims court, this date is the same as ANSWER_DUE_D.	Date	8	289	296
HEARING_D	Date of the latest hearing on a motion filed by either party.	Date	8	297	304
LIEN_D	Date the creditor filed a lien against a debtor's property.	Date	8	305	312
GARN_D	Date the court established garnishment against the debtor's wages.	Date	8	313	320
SERVICE_TYPE	Method used to serve the papers. Valid values are: PER = Personal	Char	4	321	324

	CER = Certified Mail			
	SUB = Sub-service			
	POS = Posting (left at door)			
	FIR = First Class Mail			
D1_STRT2	Overflow field for D1_STREET.	Char	25	325	349
D1_CITY	Primary debtor's city. If this field contains a value, the D1_CS and D1_STATE fields must contain a value in order to display the city and state in the account detail page in DataLink.	Char	30	350	379
D1_CELL	Primary debtor's cell phone number. It can accommodate separators for the area code and exchange.	Char	12	380	391
SCORE_FICO	Fair Isaac credit score.	Numeric	3	392	394
SCORE_COLLECT	Creditor-calculated score.	Numeric	3	395	397
SCORE_OTHER	Creditor-calculated score.	Numeric	3	398	400
D1_CNTRY	Standard code for the debtor's country.	Char	3	401	403
D1_STREET_LONG	Primary debtor's full street address line 1. It's used for systems that can hold longer values. It should be the same value as D1_STREET + D1_STRT2. Use this field with D1_STREET in case your receivers cannot yet accept this field.	Char	50	404	453
D1_STREET2_LONG	Overflow field for D1_STREET_LONG.	Char	50	454	503

YGC Export Record Type 03 - Demographics (Alternate Debtor)

This record identifies alternate debtors on the account (debtors 1 and 2), such as a co-signer. AIM only supports the first two co-debtors for this information.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 03	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32

MASCO_FILE	Blank	Char	15	33	47
FORW_ID	You've Got Claims ID in Latitude.	Char	10	48	57
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	58	67
D2_NAME	Name of the second debtor or co-signer. The format is Lastname/Firstname.	Char	25	68	92
D2_STREET	Second debtor's street address.	Char	25	93	117
D2_CSZ	Second debtor's city, state, and postal code. The format is City ST Zip or City,ST Zip. For example, Linden NJ 07036 or Linden,NJ 07036.	Char	25	118	142
D2_PHONE	Second debtor's phone number. It can accommodate separators for the area code and exchange.	Char	15	143	157
D2_SSN	Second debtor's social security number. It can accommodate hyphens.	Char	15	158	172
D3_NAME	Name of the third debtor or co-signer. The format is Lastname/Firstname.	Char	25	173	197
D3_STREET	Third debtor's street address.	Char	25	198	222
D3_CSZ	Third debtor's city, state, and postal code. The format is City ST Zip or City,ST Zip. For example, Linden NJ 07036 or Linden,NJ 07036.	Char	25	223	247
D3_PHONE	Third debtor's phone number. It can accommodate separators for the area code and exchange.	Char	15	248	262
D3_SSN	Third debtor's social security number. It can accommodate hyphens.	Char	15	263	277
D2_DOB	Second debtor's date of birth.	Date	8	278	285
D3_DOB	Third debtor's date of birth.	Date	8	286	293
D2_DL	Second debtor's driver's license number.	Char	17	294	310
D3_DL	Third debtor's driver's license number.	Char	17	311	327

D2_CNTRY	Standard code for the second debtor's country.	Char	3	328	330
D3_CNTRY	Standard code for the third debtor's country.	Char	3	331	333
D2_STREET_LONG	Second debtor's full street address line 1. It's used for systems that can hold longer values. Use this field with D2_STREET in case your receivers cannot yet accept this field.	Char	50	334	383
D2_STREET2_LONG	Overflow field for D2_STREET_LONG.	Char	50	384	433
D3_STREET_LONG	Third debtor's full street address line 1. It's used for systems that can hold longer values. Use this field with D3_STREET in case your receivers cannot yet accept this field.	Char	50	434	483
D3_STREET2_LONG	Overflow field for D3_STREET_LONG.	Char	50	484	533

YGC Export Record Type 04 - Employment

This record identifies the debtor's employment information. You can submit a record for each of the first three debtors on the account (the primary and the first two co-debtors). AIM only supports the primary debtor and the first two co-debtors for this information.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 04.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Blank	Char	15	33	47
FORW_ID	You've Got Claims ID in Latitude.	Char	10	48	57
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	58	67
EMP_NAME	Company name of debtor's employer.	Char	40	68	107
EMP_STREET	Employer's street address.	Char	40	108	147
EMP_PO	Employer's P.O. box number.	Char	40	148	187

EMP_CS	Employer's city and state, formatted as City ST or City,ST. For example, Linden NJ or Linden,NJ.	Char	30	188	217
EMP_ZO	Employer's postal code. It can accommodate the four-digit extension with the hyphen.	Char	10	218	227
EMP_PHONE	Employer's phone number. It can accommodate separators for the area code and exchange.	Char	15	228	242
EMP_FAX	Employer's fax number. It can accommodate separators for the area code and exchange.	Char	15	243	257
EMP_ATTN	Department or personnel to whom to direct correspondence.	Char	40	258	297
EMP_PAYR	Contact person in the payroll department.	Char	40	298	337
EMP_NO *required field	Number the debtor's employer assigned to identify the debtor. It can contain up to three employment records. Valid values are:1, 2, or 3. For example, the record 04 for the primary debtor can have EMP_NO = 1 and the record 04 for the co-signer can have EMP_NO = 2) If AIM sends a record 04 with the same EMP_NO as a previous record 04 for the same account, the second record overwrites the first.	Numeric	3	338	340
EMPLOYEE_NAME	Debtor's name. There is no format restriction.	Char	30	341	370
EMP_INCOME	Debtor's gross annual income from this employer.	Numeric	14.2	371	384
EMP_FREQ	Debtor's pay rate basis. Valid values are: H = Hourly A = Annual W = Weekly M = Monthly B = Bi-monthly S = Semi-monthly	Char	1	385	385
EMP_POS	Debtor's title at the place of employment.	Char	20	386	405
EMP_TENURE	Debtor's length of service in months.	Numeric	3	406	408

EMP_CNTRY	Standard code for the debtor's country.	Char	3	409	411

YGC Export Record Type 05 - Assets

This record contains debtor bank account information and non-auto or non-real estate asset information for a previous post-dated transaction (ACH or paper draft) that users added in Latitude. You can submit a record for each of the first three debtors on the account (the primary and the first two co-debtors). AIM only supports the primary debtor and the first two co-debtors for this information.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 05.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Blank	Char	15	33	47
FORW_ID	You've Got Claims ID in Latitude.	Char	10	48	57
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	58	67
FILLER	Currently a free field	Char	20	68	87
BANK_NAME	Name of the debtor's bank.	Char	30	88	117
BANK_STREET	Bank's street address.	Char	30	118	147
BANK_CSZ	Bank's city, state, and postal code, formatted as City ST Zip or City,ST Zip. For example, Linden NJ 07036 or Linden,NJ 07036.	Char	30	148	177
BANK_ATTN	Contact name for the bank.	Char	30	178	207
BANK_PHONE	Bank's phone number. It can accommodate separators for the area code and exchange.	Char	15	208	222
BANK_FAX	Bank's fax number. It can accommodate separators for the area code and exchange.	Char	15	223	237
BANK_ACCT	Debtor's bank account number.	Char	34	238	271
MISC_ASSET1	Non-land or non-automobile asset like a stock portfolio. A receiver can send a Record 46 to	Char	25	272	296

	supply physical asset information. If this field contains a value, set BANK_NO to 1.				
MISC_ASSET2	Non-land or non-automobile asset like a stock portfolio. A receiver can send a Record 46 to supply physical asset information. If this field contains a value, set BANK_NO to 1.	Char	25	297	321
MISC_ASSET3	Non-land or non-automobile asset like a stock portfolio. A receiver can send a Record 46 to supply physical asset information. If this field contains a value, set BANK_NO to 1.	Char	25	322	346
MISC_PHONE	Phone number relating to the miscellaneous asset. If this field contains a value, set BANK_NO to 1.	Char	15	347	361
BANK_NO	Debtor's bank number. It can contain up to three bank records. Valid values are: 1, 2, or 3. For example, Record 05 for the debtor's checking account can have BANK_NO = 1 and Record 05 for the debtor's savings account can have BANK_NO = 2. If you send a record 05 with the same BANK_NO as a previous record 05 for the same account, the second record overwrites the first. If you have a miscellaneous asset described in this record, this value must be 1.	Numeric	3	362	364
BANK_CNTRY	Standard code for the bank's country.	Char	3	365	367

YGC Export Record Type 06 - Miscellaneous Extra Data

This record identifies the debtor's attorney information and any miscellaneous information that no other record accommodates. You can submit a record for each of the first three debtors on the account (the primary and the first two co-debtors). AIM only supports the primary debtor and the first two co-debtors for this information.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 06.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Blank.	Char	15	33	47
FORW_ID	You've Got Claims ID in Latitude.	Char	10	48	57

FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	58	67
ADVA_NAME	Name of the debtor's attorney. There is no format restriction.	Char	30	68	97
ADVA_FIRM	Name of the debtor's attorney's firm.	Char	30	98	127
ADVA_FIRM2	Overflow field for ADVA_FIRM.	Char	30	128	157
ADVA_STREET	Attorney's street address.	Char	30	158	187
ADVA_CSZ	Attorney's city, state, and postal code, formatted as City ST Zip or City,ST Zip. For example, Linden NJ 07036 or Linden,NJ 07036.	Char	30	188	217
ADVA_SALUT	Attorney's preferred salutation in correspondence, such as "Dear Attorney Lewis:"	Char	30	218	247
ADVA_PHONE	Attorney's phone number. It can accommodate separators for the area code and exchange.	Char	30	248	277
ADVA_FAX	Attorney's fax number. It can accommodate separators for the area code and exchange.	Char	15	278	292
ADVA_FILENO	File number the debtor's attorney's firm assigned to this account.	Char	12	293	304
MISC_DATE1	Miscellaneous date regarding the account. If this field contains a value, set ADVA_NUM to 1.	Date	8	305	312
MISC_DATE2	Miscellaneous date regarding the account. If this field contains a value, set ADVA_NUM to 1.	Date	8	313	320
MISC_AMT1	Miscellaneous dollar amount regarding the account. If this field contains a value, set ADVA_NUM to 1.	Numeric	14.2	321	334
MISC_AMT2	Miscellaneous dollar amount regarding the account. If this field contains a value, set ADVA_NUM to 1.	Numeric	14.2	335	348

MISC_COMM1	Miscellaneous comment regarding the account. If this field contains a value, set ADVA_NUM to 1.	Char	15	349	363
MISC_COMM2	Miscellaneous comment regarding the account. If this field contains a value, set ADVA_NUM to 1.	Char	15	364	378
MISC_COMM3	Miscellaneous comment regarding the account. If this field contains a value, set ADVA_NUM to 1.	Char	15	379	393
MISC_COMM4	Miscellaneous comment regarding the account. If this field contains a value, set ADVA_NUM to 1.	Char	15	394	408
ADVA_NUM	Debtor or co-debtor attorney record number. It can contain up to three attorney records. Valid values are: 1 = Primary debtor 2 = First co-debtor 3 = Second co-debtor	Char	3	409	411
ADVA_CNTRY	Standard code for the debtor's attorney's country.	Char	3	412	414

YGC Export Record Type 07 - Legal

This record contains information regarding a suit filed against the debtor. The receiver can provide more details using Record 41.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 07.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Blank.	Char	15	33	47
FORW_ID	You've Got Claims ID in Latitude.	Char	10	48	57
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	58	67

CRT_COUNTY	County where the creditor filed suit against the debtor.	Char	20	68	87
CRT_DESIG	Typically, the full name of the court (for example, Gwinnett County State Court, THE NINTH JUDICIAL CIRCUIT).	Char	30	88	117
CRT_TYPE	Brief description of the court (for example, Superior, Supreme, Circuit).	Char	15	118	132
SHER_NAME	Official name of the sheriff's office or title, such as GLENN COUNTY SHERIFF, or the full name of the sheriff. You can use this field with the SHER_NAME2 field.	Char	25	133	157
SHER_NAME2	Overflow field for SHER_NAME.	Char	25	158	182
SHER_STREET	Sheriff's office's street address.	Char	25	183	207
SHER_CSZ	Sheriff's office's city, state, and postal code, formatted as City ST Zip or City,ST Zip. For example, Linden NJ 07036 or Linden,NJ 07036.	Char	25	208	232
SUIT_AMT	Dollar amount requested in the suit.	Numeric	14.2	233	246
CNTRCT_FEE	Dictated by the credit contract up front, AIM adds it to the principal from which the receiving attorney can take a commission.	Numeric	14.2	247	260
STAT_FEE	Statutory fee awarded only to the attorney (not remitted on), as determined by the debtor's state.	Numeric	14.2	261	274
DOCKET_NO	Initial number assigned to the suit.	Char	15	275	289
JDGMNT_NO	Depending on the state the creditor filed suit, the court may assign a new number upon judgment.	Char	12	290	301
BKCY_NO	Court-issued number indicating the debtor filed for bankruptcy.	Char	12	302	313
SUIT_DATE	Date the creditor filed suit against the debtor.	Date	8	314	321
JDGMNT_DATE	Judgment date.	Date	8	322	329
JDGMNT_AMT	Dollar amount awarded in the judgment.	Numeric	14.2	330	343

JUDG_PRIN	Principal amount of the judgment.	Numeric	14.2	344	357
PREJ_INT	Dollar amount of the interest due before the court rendered judgment.	Numeric	14.2	358	371
JDG_COSTS	Sum of the costs to the sender to carry the suit forward, such as attorney fees.	Numeric	14.2	372	385
ADJUSTMENT	Difference between what the creditor requested in the suit and the judgment amount.	Numeric	14.2	386	399
SHER_CNTRY	Standard code for the sheriff's country.	Char	3	400	402

YGC Export Record Type 08 - Caption

This record contains the caption for the parties named in the suit. Typically, the Plaintiffs are the original creditors and the Defendants are the debtors.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 08.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Blank.	Char	15	33	47
FORW_ID	You've Got Claims ID in Latitude.	Char	10	48	57
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	58	67
PLAINTIFF_1	First plaintiff, typically the debt owner or original creditor. There is no format restriction.	Char	30	68	97
PLAINTIFF_2	Second plaintiff. There is no format restriction.	Char	30	98	127
PLAINTIFF_3	Third plaintiff. There is no format restriction.	Char	30	128	157
PLAINTIFF_4	Fourth plaintiff. There is no format restriction.	Char	30	158	187
PLAINTIFF_5	Fifth plaintiff. There is no format restriction.	Char	30	188	217
PLAINTIFF_6	Sixth plaintiff. There is no format restriction.	Char	30	218	247

PLAINTIFF_7	Seventh plaintiff. There is no format restriction.	Char	30	248	277
DEFENDANT_1	Full name of the first defendant, typically the debtor. There is no format restriction.	Char	30	278	307
DEFENDANT_2	Name of the second defendant. It can also be an alias of the primary defendant. There is no format restriction.	Char	30	308	337
DEFENDANT_3	Name of the third defendant. There is no format restriction.	Char	30	338	367
DEFENDANT_4	Name of the fourth defendant. There is no format restriction.	Char	30	368	397
DEFENDANT_5	Name of the fifth defendant. There is no format restriction.	Char	30	398	427
DEFENDANT_6	Name of the sixth defendant. There is no format restriction.	Char	30	428	457
DEFENDANT_7	Name of the seventh defendant. There is no format restriction.	Char	30	458	487
DEFENDANT_8	Name of the eighth defendant. There is no format restriction.	Char	30	488	517
DEFENDANT_9	Name of the ninth defendant. There is no format restriction.	Char	30	518	547

YGC Export Record Type 09 - Notes

This record reports status updates and notes to attorneys. Include a PCODE to identify the update. Examples of status updates are direct payment, suit filed, account refused, judgment issued, and account closed.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 09.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Blank.	Char	15	33	47

FORW_ID	You've Got Claims ID in Latitude.	Char	10	48	57
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	58	67
PDATE	Message sent date.	Date	8	68	75
PCODE	Type of status update. Some codes trigger changes to the account in the DataLink.	Char	8	76	83
PCMT	Comment or description. Include a CLRF after the last character so you don't have to right-pad with spaces to fill 1024 characters.	Char	1024	84	1107

YGC Export Record Type 15 - Deceased

This record reports that the deceased debtor has an estate from which the client can collect debt. AIM only supports the primary debtor and the first two co-debtors for this information.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 15.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Blank.	Char	15	33	47
FORW_ID	You've Got Claims ID.	Char	10	48	57
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	58	67
DBTR_NUM	Identifies which debtor on the account is filing for bankruptcy. Valid values are: 1 = Primary debtor 2 = Second debtor 3 = Third debtor The last record (02 or 31) determines the primary debtor. The last record (03 or 33) determines the second and third debtors.	Numeric	3	68	70
DOD	Date the debtor died.	Date	8	71	78

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PRB_CASE_NO	Court-issued case number.	Char	15	79	93
PRB_ST	State abbreviation of the debtor's residence.	Char	2	94	95
PRB_CTY	County name of the debtor's residence.	Char	20	96	115
PRB_CRT	Name of the court where the person handling the estate filed the probate. There is no format restriction.	Char	30	116	145
PRB_DATE	Date the person handling the estate filed the probate.	Date	8	146	153
PRB_EXP	Last date on which the client can file claims against the estate.	Date	8	154	161
REP_NAME	Cull name of the person handling the estate.	Char	40	162	201
REP_STRT1	Personal representative's street address line 1.	Char	40	202	241
REP_STRT2	Overflow field for REP_STRT1.	Char	40	242	281
REP_CITY	Personal representative's city.	Char	30	282	311
REP_ST	Personal representative's state.	Char	2	312	313
REP_ZIP	Personal representative's postal code, which can include the four-digit extension.	Char	10	314	323
REP_PHONE	Personal representative's phone number.	Char	20	324	343
ATTY_NAME	Estate attorney's full name.	Char	40	344	383
ATTY_FIRM	Estate attorney's law firm.	Char	40	384	423
ATTY_STRT1	Estate attorney's street address line 1.	Char	40	424	463
ATTY_STRT2	Overflow field for ATTY_STRT1.	Char	40	464	503
ATTY_CITY	Estate attorney's city.	Char	30	504	533
ATTY_ST	Estate attorney's state.	Char	2	534	535
ATTY_ZIP	Estate attorney's postal code, which can include the four-digit extension.	Char	10	536	545

ATTY_PHONE	Estate attorney's phone number.	Char	20	546	565
REP_CNTRY	Personal representative's country.	Char	3	566	568
ATTY_CNTRY	Estate attorney's country.	Char	3	569	571

YGC Export Record Type 16 - Assets

This record contains a real estate or automobile asset the debtor owns. AIM only supports the primary debtor and the first two co-debtors for this information.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 16.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Blank.	Char	15	33	47
FORW_ID	You've Got Claims ID in Latitude.	Char	10	48	57
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	58	67
DBTR_NUM	Debtor on the account who owns the asset. Valid values are: 1 = Primary debtor 2 = Second debtor 3 = Third debtor	Numeric	3	68	70
ASSET_ID	Code that identifies the asset the debtor owns.	Char	3	71	73
ASSET_OWNER	Full name of the debtor who owns the asset.	Char	60	74	133
STREET	Street address for the asset.	Char	40	134	173
STREET_2	Overflow field for STREET.	Char	40	174	213
STREET_3	Overflow field for STREET_2.	Char	40	214	253
CITY	City for the asset.	Char	30	254	283

TOWN	Town or borough for the asset. You can use an alternative or supplement to CITY.	Char	30	284	313
CNTY	County for the asset.	Char	30	314	343
STATE	Abbreviation of the state for the asset.	Char	2	344	345
ZIP	Postal code for the asset.	Char	20	346	365
CNTRY	Abbreviation of the country for the asset.	Char	3	366	368
PHONE	Phone number for the asset. This field can accommodate separators for the area code and exchange.	Char	20	369	388
BLOCK	For a land asset, the block number.	Char	10	389	398
LOT	For a land asset, the lot number.	Char	10	399	408
ASSET_VALUE	Dollar value of the asset.	Numeric	9.2	409	417
ASSET_DESC	Description of the asset.	Char	40	418	457
ASSET_VIN	For an automobile asset, the vehicle ID number.	Char	20	458	477
ASSET_LIC_PLATE	For an automobile asset, the license plate number.	Char	10	478	487
ASSET_COLOR	For an automobile asset, the color of the vehicle.	Char	15	488	502
ASSET_YEAR	For an automobile asset, the manufacturing year.	Char	4	503	506
ASSET_MAKE	For an automobile asset, the maker of the vehicle.	Char	20	507	526
ASSET_MODEL	For an automobile asset, the vehicle model.	Char	20	527	546
REPO_FILE_NUM	For an automobile asset, the repossession file number that the creditor assigned.	Char	15	547	561
REPO_D	For an automobile asset, the date the repossession occurred.	Date	8	562	569

REPO_AMT	For an automobile asset, the value of the vehicle. This value is the same as ASSET_VALUE.	Numeric	9.2	570	578
CERT_TITLE_NAME	For an automobile asset, the name of the new owner as stated on the title.	Char	40	579	618
CERT_TITLE_D	For an automobile asset, the certification title transfer date.	Date	8	619	626
MORT_FRCL_D	For a real estate asset, the foreclosure date.	Date	8	627	634
MORT_FRCL_FILENO	Court-issued case number for the foreclosure.	Char	15	635	649
MORT_FRCL_DISMIS_D	Date the court dismissed the foreclosure for whatever reason.	Date	8	650	657
MORT_PMT	Periodic or total payment on the mortgage.	Numeric	7.2	658	664
MORT_RATE	Mortgage interest rate in decimal form. For example, if the interest rate is 19.5 percent, the value is ".1950."	Numeric	4.3	665	668
MORT_BOOK_1	Number of the local records book where the clerk filed property, or the liber number.	Char	5	669	673
MORT_PAGE_1	Page number in the local records book where the clerk filed the property.	Char	5	674	678
MORT_BOOK_2	If MORT_BOOK_1 is the liber number, this field contains the portfolio number of the property.	Char	5	679	683
MORT_PAGE_2	Page number corresponding to MORT_BOOK_2.	Char	5	684	688
MORT_RECRD_D	Date the clerk recorded the mortgage in the local record book.	Date	8	689	696
MORT_DUE_D	Mortgage due date.	Date	8	697	704
LIEN_FILE_NUM	Number the land records office provided in the property's county.	Char	15	705	719

LIEN_CASE_NUM	Case number that the bank holding the lien assigned.	Char	15	720	734
LIEN_D	Date the court established a lien.	Date	8	735	742
LIEN_BOOK	Number of the local records book where the clerk filed the lien.	Char	5	743	747
LIEN_PAGE	Page number in the local records book where the lien is filed.	Char	5	748	752
LIEN_AOL	Indicates whether there was a response to the lien. Valid values are: Y = Yes N = No	Char	1	753	753
LIEN_RLSE_D	Date the clerk filed the lien release (the confirmation of the lien's payment).	Date	8	754	761
LIEN_RLSE_BOOK	Number of the local records book where the clerk filed the lien release.	Char	5	762	766
LIEN_RLSE_PAGE	Page number in the local records book where the clerk filed the lien release.	Char	5	767	771
LIEN_LITIG_D	Lien foreclosure date.	Date	8	772	779
LIEN_LITIG_BOOK	Number of the local records book where the clerk filed the foreclosed lien.	Char	5	780	784
LIEN_LITIG_PAGE	Page number in the local records book where the clerk filed the foreclosed lien.	Char	5	785	789

YGC Export Record Type 19 - Bankruptcy

This record contains bankruptcy information. AIM only supports the primary debtor and the first two co-debtors for this information.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 19.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12

FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Blank.	Char	15	33	47
FORW_ID	You've Got Claims ID.	Char	10	48	57
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	58	67
DBTR_NUM	Identifies which debtor on the account is filing for bankruptcy. Valid values are: 1 = Primary debtor 2 = Second debtor 3 = Third debtor The last record (02 or 31) determines the primary debtor. The last record (03 or 33) determines the second and third debtors.	Numeric	3	68	70
CHAPTER	Chapter within the bankruptcy code, typically 7 or 13 for individuals.	Char	3	71	73
BK_FILENO	Court-issued case number for the bankruptcy.	Char	15	74	88
LOC	Location where the debtor filed bankruptcy. You can use this field for the court jurisdiction. There is no format restriction.	Char	40	89	128
FILED_DATE	Date the debtor filed bankruptcy.	Date	8	129	136
DSMIS_DATE	Date the court dismissed the bankruptcy.	Date	8	137	144
DSCHG_DATE	Date the court issued a discharge for the bankruptcy. The discharge relieves the debtor of personal liability aside from the collateral.	Date	8	145	152
CLOSE_DATE	Date the court adjudicated the case.	Date	8	153	160
CNVRT_DATE	Date the court converted the bankruptcy from one Chapter to another, typically from 13 to 7.	Date	8	161	168

MTG341_DATE	Date the initial meeting took place between creditors and debtors, typically 30 days after the filed date.	Date	8	169	176
MTG341_TIME	Time of day the initial meeting took place between creditors and debtors.	Char	8	177	184
MTG341_LOC	Location where the initial meeting took place between creditors and debtors.	Char	40	185	224
JUDGE_INIT	Bankruptcy judge's initials.	Char	3	225	227
REAF_AMT	Amount the debtor agrees to pay in full; the reaffirmation survives the bankruptcy.	Numeric	14.2	225	241
REAF_DATE	Date the debtor signed the reaffirmation.	Date	8	242	249
PAY_AMT	Periodic payment in a Chapter 11 or 13 bankruptcy, or a lump sum payment of a Chapter 7 bankruptcy.	Numeric	14.2	250	263
PAY_DATE	Date the creditor and debtor agreed on the payment arrangement.	Date	8	264	271
CONF_DATE	Date the judge approved the payment plan.	Date	8	272	279
CURE_DATE	Date the debtor paid all arrearages, fees, and interest.	Date	8	280	287

YGC Export Record Type 22 - Historical Address

This record reports previously saved addresses for the debtor identified in the DBTR_NUM field. You can send multiple addresses for the same debtor. AIM only supports the primary debtor and the first two co-debtors for this information.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 22.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Blank.	Char	15	33	47

FORW_ID	You've Got Claims ID in Latitude.	Char	10	48	57
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	58	67
DBTR_NUM	Debtor on the account who had this address. Valid values are: 1 = Primary debtor 2 = Second debtor 3 = Third debtor AIM assigned these numbers in the latest record 02 or 31 (primary) and 03 or 33 (2nd and 3rd debtors).	Numeric	3	68	70
F_NAME	First name of the debtor who had this address.	Char	50	71	120
M_NAME	Middle name of the debtor who had this address.	Char	25	121	145
L_NAME	Last name of the debtor who had this address.	Char	50	146	195
SUFFIX	Suffix of the debtor's name (for example, Jr., III) who had this address.	Char	5	196	200
STREET	Debtor's previous street address.	Char	50	201	250
STREET2	Overflow field for STREET.	Char	50	251	300
CITY	Debtor's previous city.	Char	30	301	330
STATE	Abbreviation for the debtor's previous state.	Char	3	331	333
ZIP	Postal code of the debtor's old address.	Numeric	10	334	343
CNTRY	Standard code of the debtor's previous country.	Char	3	344	346
OBTAINED_D	Date the debtor provided a previous address to the source for verification.	Date	8	347	354
SOURCE	Source verifying the debtor's previous address (blank).	Char	10	355	364
VERIFY_STAT	Address verification status. Valid values are: V = Verified	Char	1	365	365

	N = Not verified B = Bad If the value is "B," populated the BAD_REASON field.				
BAD_REASON	If the address is bad, the reason it's bad.	Char	25	366	390
VERIFY_D	Date the source verified the address.	Date	8	391	398
START_D	Date the debtor began residing at this address.	Date	8	399	406
END_D	Date the debtor stopped residing at this address.	Date	8	407	414

YGC Export Record Type 23 - Historical Phone

This record reports previously saved phone numbers for the debtor identified in the DBTR_NUM field. You can send multiple phone numbers for the same debtor. AIM only supports the primary debtor and the first two co-debtors for this information.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 23.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Blank.	Char	15	33	47
FORW_ID	You've Got Claims ID in Latitude.	Char	10	48	57
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	58	67
DBTR_NUM	Debtor on the account who had this phone number. Valid values are: 1 = Primary debtor 2 = Second debtor 3 = Third debtor AIM assigned these numbers in the latest record 02 or 31 (primary) and 03 or 33 (2nd and 3rd debtors).	Numeric	3	68	70

F_NAME	First name of the debtor who had this phone number.	Char	50	71	120
M_NAME	Middle name of the debtor who had this phone number.	Char	25	121	145
L_NAME	Last name of the debtor who had this phone number.	Char	50	146	195
SUFFIX	Debtor's name suffix (for example, Jr., III) who had this phone number.	Char	5	196	200
PHONE	Debtor's previous phone number. It can accommodate separators for the area code and exchange.	Char	15	201	215
PH_EXT	Debtor's previous phone number extension.	Char	5	216	220
PH_TYPE	Type of phone line this number represents. Valid values are: H = Home H2 = Secondary home C = Cell C2 = Secondary cell W = Work W2 = Secondary work F = Fax	Char	2	221	222
OBTAINED_D	Date the debtor provided a phone number to the source for verification.	Date	8	223	230
SOURCE	Source verifying the debtor's previous phone number (blank).	Char	10	231	240
VERIFY_STAT	Phone number verification status. Valid values are: V = Verified N = Not verified B = Bad If the value is "B," populate the BAD_REASON field.	Char	1	241	241

BAD_REASON	If the phone number is bad, the reason it's bad.	Char	25	242	266
VERIFY_D	Date the source verified the phone number.	Date	8	267	274
START_D	Date the debtor began using this phone number.	Date	8	275	282
END_D	Date the debtor stopped using this phone number.	Date	8	283	290

YGC Export Record Type 24 - Historical Payment

This record reports a financial transaction (payment or reversal) before AIM sends the account to the receiver. You can send multiple records to record the transaction history of the same account. Receivers can combine these records through their collection system into one statement of evidence.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 24	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Blank.	Char	15	33	47
FORW_ID	You've Got Claims ID in Latitude.	Char	10	48	57
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	58	67
POST_D	Date AIM received and posted the transaction in Latitude.	Date	8	68	75
TRANS_CD	Type of payment or cost. Use an accounting or disbursement YGC status code.	Char	8	76	83
TRANS_NUM	Unique identifier for the transaction.	Numeric	6	84	89
TOTAL_COLL	Total amount of the payment (sum of Paid1 through Paid10).	Decimal	14.2	90	103
PRIN_COLL	Amount of the payment applied toward principal.	Decimal	14.2	104	117
INT_COLL	Amount of the payment applied toward interest.	Decimal	14.2	118	131
COST_COLL	Amount of the payment applied toward collection costs.	Decimal	14.2	132	145

STATU_COLL	Not used.	Decimal	14.2	146	159
COMM	Not used.	Decimal	14.2	160	173
DBTR_BAL	Not used.	Decimal	14.2	174	187
COST_EXPND	Not used.	Decimal	14.2	188	201
DESC	Description of the payment or reversal.	Char	30	202	231
CMT	Transaction comment.	Char	30	232	261

YGC Export Record Type 99 - Coupon to Bond Account

This record sends a law list to make a request to bond the account.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 99.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Blank.	Char	15	33	47
FORW_ID	You've Got Claims ID in Latitude.	Char	10	48	57
LAW_LIST	Default law list set for the attorney in AIM.	Char	10	58	67
DATE_FORW	Date AIM first added the account to a placement file, regardless of when the attorney uploaded it to YouveGotClaims®.	Date	8	68	75
ORIG_CLAIM	Dollar amount of principal due.	Numeric	14.2	76	89
ORIG_INT	Dollar amount of accrued interest.	Numeric	14.2	90	103
ORG_INT_D	Last day of the accrual period.	Date	8	104	111
RE	Company name of the original creditor, debt purchaser, or collection agency. This field is optional.	Char	30	112	141

VS	Primary debtor's name. The format is Lastname/Firstname. AIM requires this field.	Char	30	142	171
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	172	181
LL_ATTYID	Identifier the firm assigned to the attorney.	Char	10	182	191
ATTY_NAME	Came of the firm receiving the account.	Char	35	192	226
ATTY_STREET	Street address of the firm receiving the account.	Char	35	227	261
ATTY_CSZ	Receiving firm's city, state, and postal code, formatted as City ST Zip or City,ST Zip. For example, Linden NJ 07036 or Linden,NJ 07036.	Char	35	262	296
ATTY_CONTA	Name of the contact at the receiving firm.	Char	35	297	331
ATTY_CNTRY	Country of the receiving firm.	Char	22	332	353
FORW_NAME	Name of the company sending the account.	Char	35	354	388
FORW_STREET	Street address of the company sending the account.	Char	35	389	423
FORW_CSZ	City, state, and postal code of the company sending the account, formatted as City ST Zip or City,ST Zip. For example, Linden NJ 07036 or Linden,NJ 07036.	Char	35	424	458
FORW_PHONE	Sender's phone number. It can accommodate separators for the area code and exchange.	Char	15	459	473
FORW_CONTA	Name of the contact at the company sending the account.	Char	35	474	508

YGC Recalls Export File Layout

YGC Recalls Export File Layout

The YGC recall export file contains account recalls. AIM sends these files to attorneys to inform them that AIM is recalling the accounts. Valid account recalls are:

- **Pending:** Pending recalls allow the outside agency time to generate objections before AIM issues a final recall. The attorney still holds the accounts.

- **Final:** AIM recalls accounts in final recall immediately.

YGC Recalls Export File Naming Convention

AIM Printable Help

Fixed: AIMYYYYMMDDHHMMSS_####.CRCL

Where #### represents the ID or YGC ID assigned to the attorney holding the accounts.

YGC Export Record Type 09 - Pending Recall

This record reports pending recalls.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 09.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Blank.	Char	15	33	47
FORW_ID	You've Got Claims ID in Latitude.	Char	10	48	57
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	58	67
PDATE	Message sent date.	Date	8	68	75
PCODE	Value = *CC:R115	Char	8	76	83
PCMT	Value = Pending Recall Notification. AIM recalls this account in the specified number of days. To retain the account as placed, remit the appropriate objection Code.	Char	1024	84	1107

YGC Export Record Type 09 - Final Recall

This record reports final recalls.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 09.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Blank.	Char	15	33	47
FORW_ID	You've Got Claims ID in Latitude.	Char	10	48	57

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FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	58	67
PDATE	Message sent date.	Date	8	68	75
PCODE	Value = *CC:C111	Char	8	76	83
PCMT	Value = Final Recall of Account. Close account promptly.	Char	1024	84	1107

YGC Export File Layout Definitions

YGC Export File Layout Definitions

Use the **Define Export Definition** window to define the layouts for files that you export from AIM and send to attorneys that use the You've Got Claims (YGC) file format. The same elements are available for all export files (for example, Bankruptcy, Deceased, and Demographics). The tab name indicates the record type for the selected export file. An export file can have multiple record types. For example, the Demographics export file has a record type for the primary debtor and a record type for each co-debtor you want to include in the export file.

Add a Record Type to an Export File

Use the **Define Export Definition** window to add a record type to an export file layout.

To add a record type to an export file

1. In the menu bar, click **Tools** and then click **Export Layout Definer**.

2. Click **YGC Standard Layout** and then click the file layout to define (for example, **Bankruptcy**, **Deceased**, **Demographics**). The **Define Export Definition** window appears.

3. Click **Add Record Type**. The **New Record Table Name** dialog box appears.
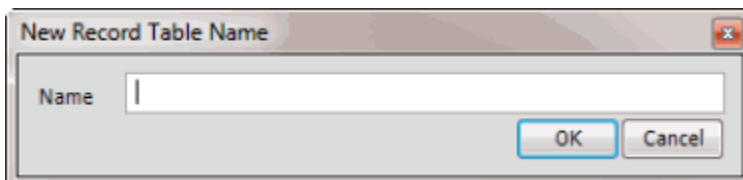
4. In the **Name** box, type a name for the record type and then click **OK**. A tab with the specified name appears.
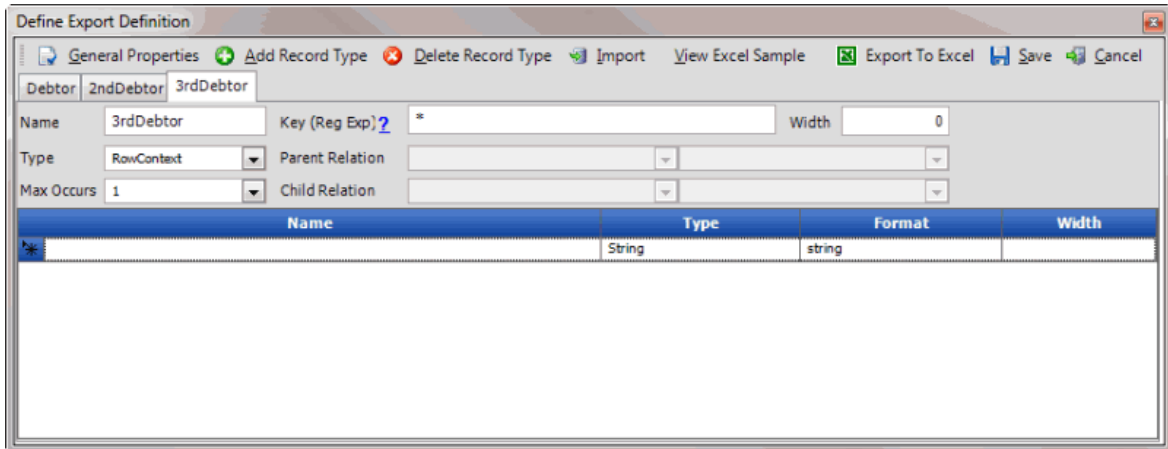
Name: Record type name.

Type: Record type. Valid values are:

> **FileContext:** Record type occurs one time in the file. Select this record type for header and trailer records.

> **RowContext:** Parent or only record type in the file. Only define one **RowContext** record type for each file.

> **Sub:** Child record type within the file that relates to a parent or virtual header record type. A file can have multiple child record types.

> **VirtualHeader:** Record type is the header record for multiple, stand-alone records that AIM cannot set as row context records.

> For more information, see Export Record Types.

Max Occurs: Number of times a row can appear for each account.

> For **FleContext** and **RowContext** record types, type "1".

> For **Sub** record types, if only one **Sub** record exists with this record type name, type "1". If more than one **Sub** record can exist with this record type name, type "*".

Key (Reg Exp): Regular expression syntax for locating this record. For more information, see Regular Expression Syntax.

Parent Relation [record type]: Name of the **RowContext** (parent) record type to link to the **Sub** (child) record type.

Parent Relation [field]: Name of the field to link to the **Sub** (child) record type.

Child Relation [record type]: Name of the **Sub** (child) record type to link to the **RowContext** (parent) record type.

Child Relation [field]: Name of the field to link to the **RowContext** (parent) record type.

Width: Total width of the record type. The width is applicable to fixed-length record types only.

> **Name:** Field name.

> **Type:** Field type. Valid values are:

String: Field contains alphanumeric characters.

Decimal: Field contains a number with two decimal places.

Integer: Field contains a number.

DateTime: Field contains a date, time, or both.

Format: Field format for decimal, date, and time fields.

Nodecimalpoint: No decimal point included.

nodecimalpointwithsign: No decimal point included. Number includes a plus (+) to indicate a positive number or minus (-) sign to indicate a negative number.

Signedascii: Number is in signed ASCII RMS format.

Julian: Date is in Julian format.

MM/dd/yyyy: Date is in month/day/year format.

MMddyyyy: Date is in month, day, year format, without slashes.

MMddyyyyHHmmss: Date is in month, day, year, hours, minutes, seconds format, without slashes.

yyyyMMdd: Date is in year, month, day format.

Width: Total width of the field.

5. Complete the information in the top section regarding the record type.

6. In the data grid, type data regarding the first field in the record into each of the columns and then press **Tab**. A blank row appears.

7. Complete a row for each field in the record and then click **Save**.

> **Tip:** To delete a row, click the box next to the **Name** column for the row to delete and then press the **Delete** key. In the confirmation dialog box, click **Yes**.

Modify an Export File Layout

Use the **Define Export Definition** window to modify the layout for an export file.

To modify an export file layout

1. In the menu bar, click **Tools** and then click **Export Layout Definer**.

2. Click **YGC Standard Layout** and then click the file layout to define (for example, **Bankruptcy**, **Deceased**, **Demographics**). The **Define Export Definition** window appears. The following example is for the Demographics export file layout.
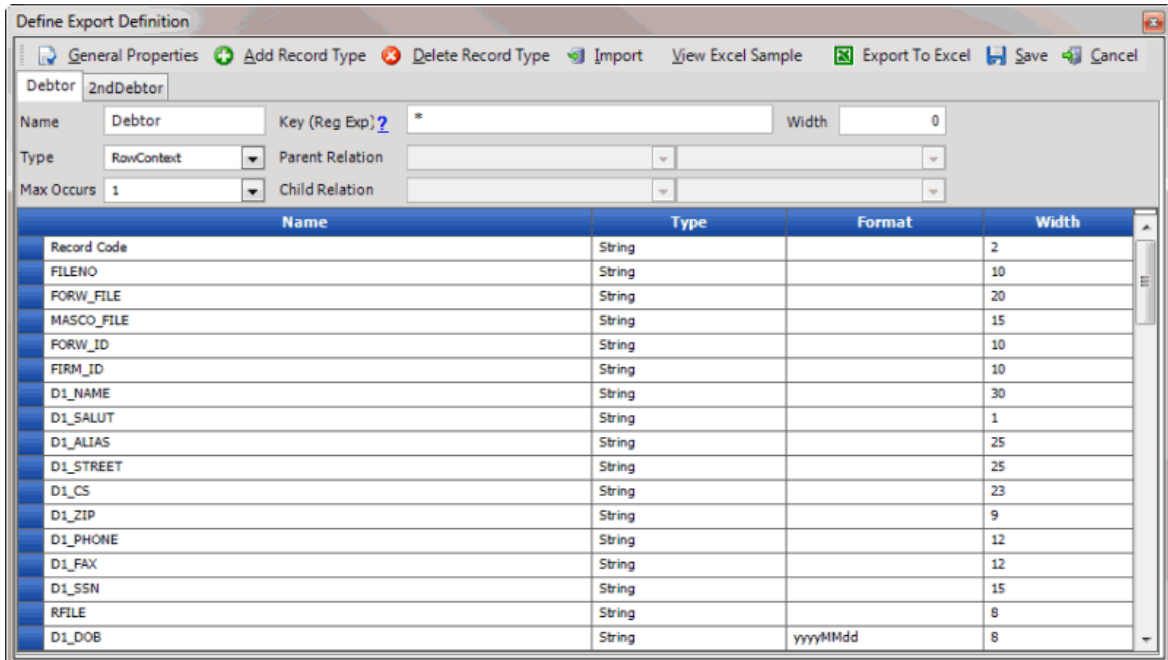
Name: Record type name.

Type: Record type. Valid values are:

> **FileContext:** Record type occurs one time in the file. Select this record type for header and trailer records.

> **RowContext:** Parent or only record type in the file. Only define one **RowContext** record type for each file.

> **Sub:** Child record type within the file that relates to a parent or virtual header record type. A file can have multiple child record types.

> **VirtualHeader:** Record type is the header record for multiple stand-alone, unrelated records that meet **RowContext** criteria and contain unique account criteria.

> For more information, see Export Record Types.

Max Occurs: Number of times a row can appear for each account.

> For **FleContext** and **RowContext** record types, type "1".

> For **Sub** record types, if only one **Sub** record exists with this record type name, type "1". If more than one **Sub** record can exist with this record type name, type "*".

Key (Reg Exp): Regular expression syntax for locating this record. For more information, see Regular Expression Syntax.

Parent Relation [record type]: Name of the **RowContext** (parent) record type to link to the **Sub** (child) record type.

Parent Relation [field]: Name of the field to link to the **Sub** (child) record type.

Child Relation [record type]: Name of the **Sub** (child) record type to link to the **RowContext** (parent) record type.

Child Relation [field]: Name of the field to link to the **RowContext** (parent) record type.

Width: Total width of the record type. The width is applicable to fixed-length record types only.

Name: Field name.

Type: Field type. Valid values are:

String: Field contains alphanumeric characters.

Decimal: Field contains a number with two decimal places.

Integer: Field contains a number.

DateTime: Field contains a date, time, or both.

Format: Field format for decimal, date, and time fields.

Nodecimalpoint: No decimal point included.

nodecimalpointwithsign: No decimal point included. Number includes a plus (+) to indicate a positive number or minus (-) sign to indicate a negative number.

Signedascii: Number is in signed ASCII RMS format.

Julian: Date is in Julian format.

MM/dd/yyyy: Date is in month/day/year format.

MMddyyyy: Date is in month, day, year format, without slashes.

MMddyyyyHHmmss: Date is in month, day, year, hours, minutes, seconds format, without slashes.

yyyyMMdd: Date is in year, month, day format.

Width: Total width of the field.

3. If the file has multiple record types associated, click the tab for the record type to modify.

4. Modify the information as necessary.

5. To add a field, scroll to the end of the data grid and type data in the blank row.

6. To delete a field, click the box next to the **Name** column for the row to delete and then press the **Delete** key. In the confirmation dialog box, click **Yes**.

7. To modify the file layout properties, see Modify the Properties of an Export File.

8. To add a record type to the file layout, see Add a Record Type to an Export File.

9. To delete a record type from the file layout, see Delete a Record Type from an Export File.

10. To import a file layout, which overwrites the existing file layout, see Import a Layout Into an Export File.

11. Click **Save**.

Delete a Record Type from an Export File

Use the **Define Export Definition** window to delete a record type from an export file.

To delete a record type from an export file

1. In the menu bar, click **Tools** and then click **Export Layout Definer**.

2. Click **YGC Standard Layout** and then click the file layout to define (for example, **Bankruptcy**, **Deceased**, **Demographics**). The **Define Export Definition** window appears.
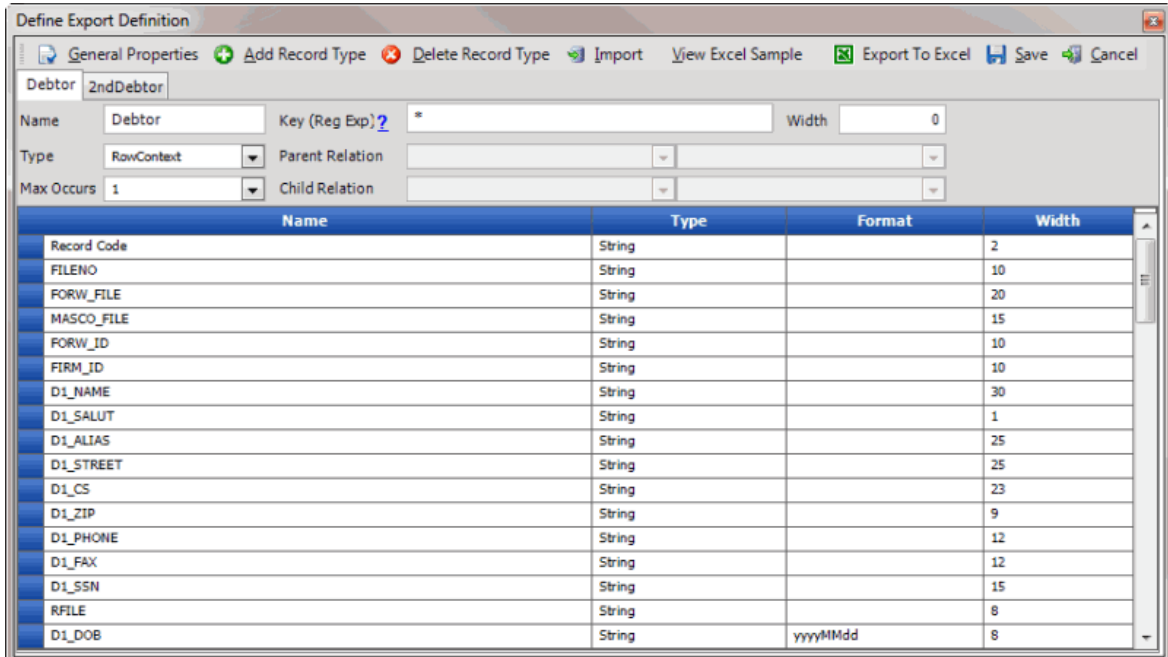

3. If the file has multiple record types associated, click the tab for the record type to delete.

4. Click **Delete Record Type**. A confirmation dialog box appears.

5. Click **Yes**. AIM deletes the record type and tab.

Modify the Properties of an Export File

Use the **General Properties** dialog box to modify the properties of an export file.

To modify the properties of an export file

1. In the menu bar, click **Tools** and then click **Export Layout Definer**.

2. Click **YGC Standard Layout** and then click the file layout to define (for example, **Bankruptcy**, **Deceased**, **Demographics**). The **Define Export Definition** window appears.

3. Click **General Properties**. The **General Properties** dialog box appears.
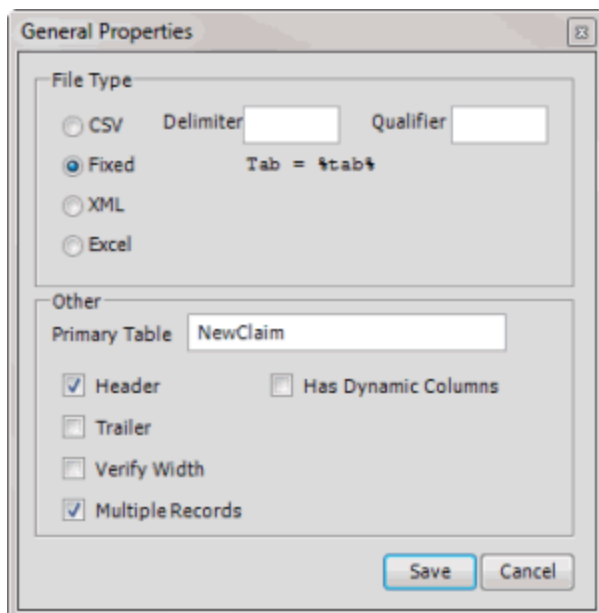
File Type

> **CSV:** (Comma-Separated Value.) If selected, AIM uses a delimiter to separate fields when it exports the file.
>
> **Delimiter:** Character to use to separate fields in a CSV file.
>
> **Qualifier:** Character to use to flag strings that could contain the character specified as the delimiter. For example, if the delimiter is a comma and a name field contains last name and first name separated by a comma, you can set a qualifier, such as quotes, to flag those strings. The exported file would show, for example, 1234,"Smith, John",ABC. The quotes indicate that the last name and first name are a single field, not two separate ones.
>
> **Fixed:** If selected, the file has a fixed width. Specify the width in the **Width** box in the **Define Export Definition** window.
>
> **XML:** If selected, AIM exports the file in XML format. For more information, contact Latitude by Genesys Support.
>
> **Excel:** If selected, AIM exports the file in Excel format.

Other

> **Primary Table:** Name of the primary table (record). This record is equivalent to a Latitude master record and must match the unique account criteria for the client.
>
> **Header:** If selected, the file contains a header record.
>
> **Trailer:** If selected, the file contains a trailer record.
>
> **Verify Width:** If selected, the system verifies whether the file width matches the value specified in the **Width** box in the **Define Export Definition** window.
>
> **Multiple Records:** If selected, the file contains more than one record type.

> **Has Dynamic Columns:** If selected, the file could have unmapped columns.

4. Complete the information and then click **Save**.

Create an Export File Layout in Excel

Use Microsoft Excel to create an export file layout that you can import into AIM.

To create an export file in Excel

1. In the menu bar, click **Tools** and then click **Export Layout Definer**.

2. Click **YGC Standard Layout** and then click the file layout to define (for example, **Bankruptcy**, **Deceased**, **Demographics**). The **Define Export Definition** window appears.

3. Click **View Excel Sample**. Excel opens and displays the file layout.

4. Save the file to any location.

5. Modify the file as necessary.

6. Delete any unused worksheets and save the file.

7. Do the steps to <u>Import a Layout Into an Export File</u>.

Import a Layout Into an Export File

Use the **Define Export Definition** window to import a layout into an export file, such as a layout that someone created in Excel. The imported layout overwrites the existing layout.

To import a layout into an export file

1. In the menu bar, click **Tools** and then click **Export Layout Definer**.

2. Click **YGC Standard Layout** and then click the file layout to define (for example, **Bankruptcy**, **Deceased**, **Demographics**). The **Define Export Definition** window appears.

3. Click **Import**. A confirmation dialog box appears.

4. Click **Yes**. A file selection dialog box appears.

5. Click the file layout to import and then click **Open**. AIM replaces the existing layout with the imported layout.

6. Modify the properties as necessary.

7. Add and modify record types as necessary.

8. Click **Save**.

View an Export File Layout in Excel

Use the **Define Export Definition** window to view an export file layout in Excel.

To view an export file layout in Excel

1. In the menu bar, click **Tools** and then click **Export Layout Definer**.

2. Click **YGC Standard Layout** and then click the file layout to define (for example, **Bankruptcy**, **Deceased**, **Demographics**). The **Define Export Definition** window appears.

3. Click **View Excel Sample**. Excel opens and displays the file layout.

**Save an Export File Layout to Excel**

Use the **Define Export Definition** window to save an export file layout to Excel. You can modify a file layout in Excel and overwrite the existing file layout in AIM with the Excel layout. For more information, see Import a Layout Into an Export File.

To save an export file layout to Excel

1. In the menu bar, click **Tools** and then click **Export Layout Definer**.

2. Click **YGC Standard Layout** and then click the file layout to define (for example, **Bankruptcy**, **Deceased**, **Demographics**). The **Define Export Definition** window appears.

3. Click **Export to Excel**. The **Save As** dialog box appears.

4. In the **File name** box, type a file name and then click **Save**.

Flat File Layout

The following diagram illustrates a typical flat file layout (fixed or delimited). The parent record is a row context record type, and the child records are sub record types. If the unique account identifier isn't in a sub record, the sub record inherits the identifier from the row context record. Multiple sub records with the same name can appear for the same account.
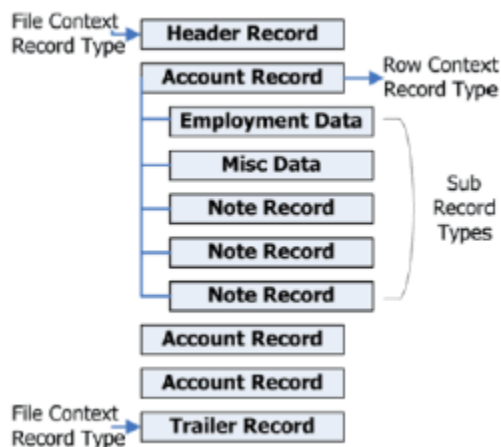
Virtual Header Layout

The following diagram illustrates a virtual header layout. You can use a virtual header record type to create a relationship among multiple, stand-alone records that AIM cannot set as row context records. Each sub record contains an account identifier.
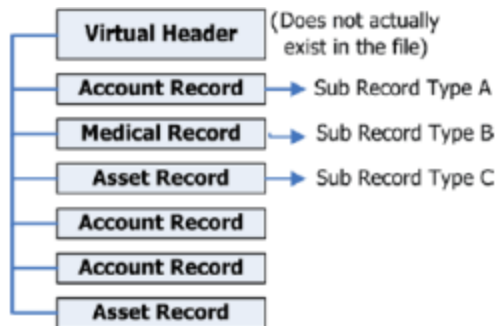
Export Record Types

Export file layouts include record types. These record types indicate whether a record is a header, footer, parent, child, or virtual header.

Record Type	Description
FileContext	Occurs one time in the file (for example, header, footer, or both).
RowContext	Occurs one time in the file. It is either the only record type in the file or the parent to one or more child (sub) record types.
Sub	Allows you to process multiple record types for the same account. For related record types (for example, co-debtors are related to a debtor), set the record type for the parent record to **RowContext** and set the record type for each child record to **Sub**. AIM requires parent and child relations to link each child record to the parent record. For each child record type, set the parent relation to the name of the parent record type and set the child relation to the name of the child record type. If there is a key field in the parent and child record types that links the parent and child, set the field relation to that key field. If there isn't a key field that links the records, ensure that you list the tab for the parent record type first and then list the tabs for the child record types in the correct order. If the records are unrelated, see **VirtualHeader**.
VirtualHeader	Allows you to process multiple unrelated record types for the same account. It creates a header relationship to the unrelated record types. Set the record type for the parent record to **VirtualHeader** and the record type for each child record to **Sub**.

Regular Expression Syntax

A regular expression is a special text string for describing a search pattern and function similar to wildcards. You can use regular expressions to search for information in a file.

The following regular expressions are available:

- [Literal Characters](#)
- [Character classes or character sets [abc]](#)
- [Dot](#)
- [Anchors](#)
- [Word boundaries](#)
- [Alternation](#)
- [Quantifiers](#)

Literal Characters

A single letter character matches the first occurrence of that character in the string. For example, "a" matches the first "a" in *Jack is a boy*, which is the "a" in "Jack."

Character	Description	Example
Any character except [\^$.|?*+()	All characters except the listed special characters match a single instance of themselves.	a matches a
\(backslash) followed by any of [\^$.|?*+()	Some characters have special meaning. A backslash placed before a special character escapes the special character to suppress its special meaning.	\+ matches +
\xFFwhere FF are 2 hexadecimal digits	Matches the character with the specified ASCII/ANSI value, which depends on the code page used. Can also use in character classes.	\xA9 matches ©when using the Latin-1 code page.
\n, \r and \t	Match an LF character, CR character, and a tab character respectively. Can also use in character classes.	\r\n matches a DOS/Windows CRLF line break.

Character classes or character sets [abc]

A character class matches one out of several characters. For example, "ae" matches either *gray* **or** *grey*, whichever word it finds first. The order of the characters in the set is irrelevant.

Character	Description	Example
[(opening square bracket)	Starts a character class. A character class matches a single character out of all the possibilities the character class offers. Inside	

	a character class, different rules apply. The rules in this section are only valid inside character classes. The rules outside this section are not valid in character classes, except \n, \r, \t and \xFF.	
Any character except ^-]\ add that character to the possible matches for the character class.	All characters except the listed special characters.	[abc] matches a, b, or c
\(backslash) followed by any of the following: ^-]\	A backslash escapes special characters to suppress their special meaning.	[\^\]] matches ^ or]
-(hyphen) except immediately after the opening [	Specifies a range of characters. A hyphen placed immediately after the opening bracket indicates a hyphen.	[a-zA-Z0-9] matches any letter or digit
^(caret) immediately after the opening [	Negates the character class, causing it to match a single character *not* listed in the character class. A caret placed anywhere except after the opening bracket indicates a caret.	[^a-d] matches x (any character except a, b, c or d)
\d, \w, and \s	Shorthand character classes match digits 0-9, word characters (alphanumeric characters plus underscore), and white space (including tabs and line breaks), respectively. Can use inside and outside character classes.	[\d\s] matches a character that is a digit or white space
\D, \W, and \S	Negated versions of the shorthand character classes. We recommend using outside character classes only as using them inside can be confusing.	\D matches a character that is not a digit

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Dot

A dot matches a single character except line break characters. For example, "gr.y" matches *gray* and *grey*. Often, a character class or negated character class is faster and more precise than the dot.

Character	Description	Example
.(dot)	Matches any single character except line break characters \r and \n. Most regex engines have a "dot matches all" or "single line" mode that causes the dot match to include line break characters.	. matches x or (almost) any other character

Anchors

An anchor matches a position rather than a character. For example, "^b" only matches the first "b" in *bob*.

Character	Description	Example
^(caret)	Matches at the start of the string to which you apply the pattern. Most regex engines have a "multi-line" mode that causes the caret to match after any line break (for example, at the start of a line in a file).	^. matches a in abc\ndef. Also matches d in "multi-line" mode.
$(dollar)	Matches at the end of the string to which you apply the pattern. Most regex engines have a "multi-line" mode that causes the dollar sign to match before any line break (for example, at the end of a line in a file). Also matches before the last line break when the string ends with a line break.	.$ matches f in abc\ndef. Also matches c in "multi-line" mode.
\A	Matches at the start of the string to which you apply the pattern. Never matches after line breaks.	\A. matches a in abc
\Z	Matches at the end of the string to which you apply the pattern. Never matches before line breaks, except for the last line break when the string ends with a line break.	.\Z matches f in abc\ndef
\z	Matches at the end of the string to which you apply the pattern. Never matches before line breaks.	.\z matches f in abc\ndef

Word boundaries

A word boundary matches at a position between a word character and either another word character or a non-word character.

Character	Description	Example
\b	Matches at the position between a word character (anything matched by \w) and a non-word character (anything matched by [^\w] or \W). It also matches the string at the start, end, or both when the first, last, or both characters in the string are word characters.	.\b matches c in abc
\B	Matches at the position between two word characters (for example, the position between \w\w) and the position between two non-word characters (for example, \W\W).	\B.\B matches b in abc

Alternation

Alternation matches one item out of a group of items and is equivalent to the "or" operator. For example, "cat|dog" matches "cat" in *About cats and dogs*. If it's applied again, it matches "dog." You can add as many alternatives as you want (for example, "cat|dog|mouse|fish." Include parenthesis for grouping. For example, "(cat|dog) food" matches *cat food* and *dog food*.

The pipe (|) character has the lowest precedence of all regex operators.

Character	Description	Example
|	Matches either the part on the left side, or the part on the right side. You can string characters together into a series of options.	abc|def|xyz matches abc, def, or xyz
|(pipe)	Use grouping to alternate only part of the regular expression.	abc(def|xyz) matches abcdef or abcxyz

Quantifiers

A quantifier matches a set number of characters that matched specific criteria. There are two types of quantifier searches: greedy (maximal) and lazy (minimal). A greedy search tries to match as many characters as it can while still returning a true value. A lazy search matches once only. For example, if you search for one to four "b's" in a row and have a string with three "b's" in a row, greedy matches the three "b's" and lazy only matches the first "b."

Character	Description	Example

?	Greedy. Makes the preceding item optional. Includes the optional item in the match when possible.	abc? matches ab or abc
??	Lazy. Makes the preceding item optional. Excludes the optional item in the match when possible.	abc?? matches ab or abc
*(star)	Greedy. Repeats the previous item zero or more times. Matches as many items as possible before trying permutations with fewer matches of the preceding item, up to the point where it doesn't match the preceding item at all.	".*" matches "def" "ghi" in abc "def" "ghi" jkl
*?(lazy star)	Lazy. Repeats the previous item zero or more times. The regex engine attempts to skip the previous item, before trying permutations with ever increasing matches of the preceding item.	".*?" matches "def" in abc "def" "ghi" jkl
+(plus)	Greedy. Repeats the previous item once or more. Matches as many items as possible before trying permutations with fewer matches of the preceding item, up to the point where the search engine matches the preceding item once only.	".+" matches "def" "ghi" in abc "def" "ghi" jkl
+?(lazy plus)	Lazy. Repeats the previous item once or more. The regex engine matches the previous item only once, before trying permutations with ever increasing matches of the preceding item.	".+?" matches "def" in abc "def" "ghi" jkl
{n}where n is an integer >= 1	Repeats the previous item exactly n times.	a{3} matches aaa
{n,m}where n >= 1 and m >= n	Greedy. Repeats the previous item between n and m times. Tries repeating m times before reducing the repetition to n times.	a{2,4} matches aa, aaa or aaaa

{n,m}?where n >= 1 and m >= n	Lazy. Repeats the previous item between n and m times. Tries repeating n times before increasing the repetition to m times.	a{2,4}? matches aaaa, aaa or aa
{n,}where n >= 1	Greedy. Repeats the previous item at least n times. Matches as many items as possible before trying permutations with fewer matches of the preceding item, up to the point where it matches the preceding item only n times.	a{2,} matches aaaaa in aaaaa
{n,}?where n >= 1	Lazy. Repeats the previous item between n and m times. The regex engine matches the previous item n times, before trying permutations with ever increasing matches of the preceding item.	a{2,}? matches aa in aaaaa

Export Data to a File

Use the **Execution Window** to export information from AIM to a file for agencies and attorneys to use. AIM creates a separate file for each agency and attorney with records that are ready for export. For more information about a specific file type, see Export File Layouts.

You can export the following information:

- Placements that users generated in Latitude.

- Recalls that users requested in Latitude.

- Automated pending and final recalls that are due based on the dates specified when AIM created the placements (and no objection exists on the account).

- Account information that users added or updated in Latitude (for example, assets, demographics, payments).

If a user selected the **Do Not Recall Bankruptcy Accounts** or the **Do Not Recall Deceased Accounts** check boxes on the **General** tab in the **Agencies/Attorneys** pane, AIM doesn't create export files for that information.

To export data to a file

1. In the menu bar, click **Actions**, click **Export**, and then click the file type to export. The **Execution Window** appears, which shows the progress of the export. If there are no records to export, a notification dialog box appears.
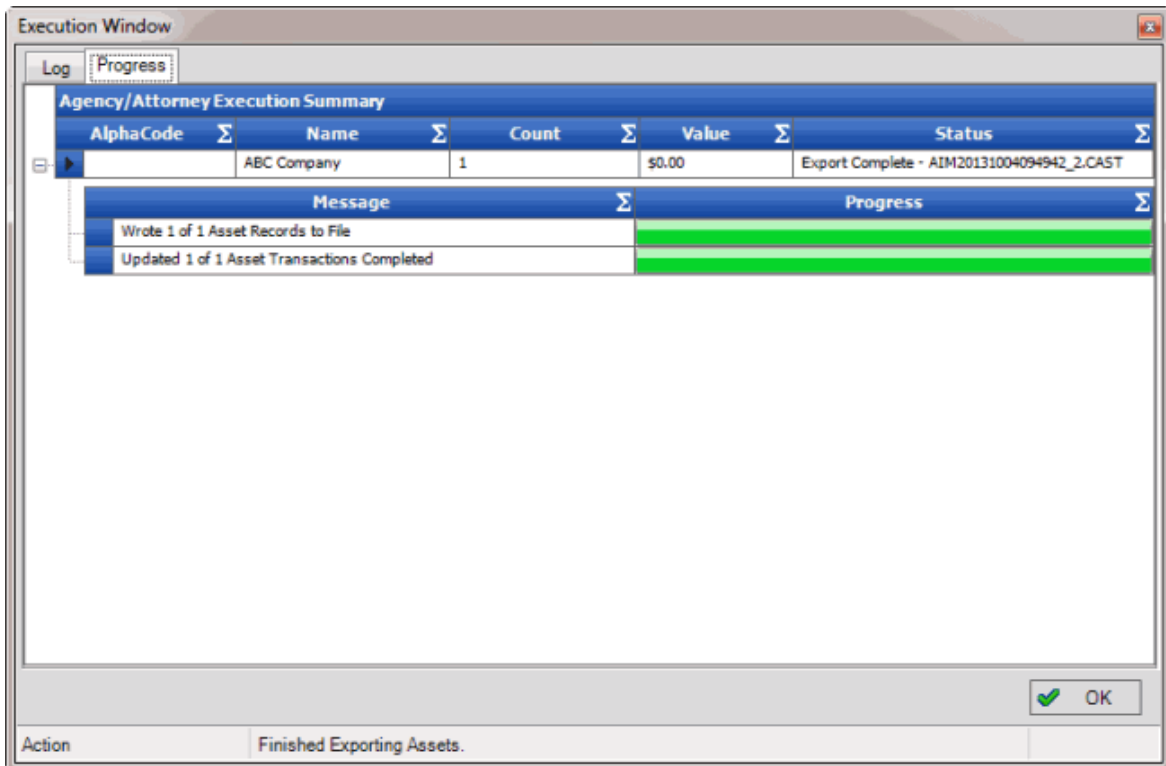
AIM saves the export files to the folder specified in global settings. If your organization configured FTP in global settings, AIM saves each agency's and attorney's file to their folder on the FTP site. If your organization configured email messaging in global settings, AIM sends an email message to the agencies and attorneys indicating that an export file is available. For more information, see Specify General Global Settings.

2. Click **OK**.

Imports

Imports

The import functionality allows you to import data from outside agencies and attorneys who hold accounts, and update the account information in Latitude. You can import all files that you receive from an agency or attorney, or import a single file at a time.

Import Process

Import Process

Agencies and attorneys can submit files that they exported from their system so you can import them into AIM and update accounts accordingly. Attorneys use the standard You've Got Claims (YGC) file format for supported record types. If errors occur during the import process, the appropriate messages appear in the Execution Window. You can view details regarding an error to determine the cause and take corrective action. For more information, see View File Processing History.

You can import the following information into AIM:

- Recall objections

- Payments and adjustments

- Account placement acknowledgments

- Account closings and returns

- Account updates such as assets, bankruptcy, demographics, notes, and payment transactions.

Payment Import Process

The payment import process imports payments and reversals that an agency or attorney submitted to your organization. AIM stores the import files in the location specified in global settings. For more information, see Specify General Global Settings.

To import a payment file, do the steps to Import a Payment File. If AIM processes the payment transaction successfully, and you set recall dates when you placed the account, AIM extends the recall dates based on the number of days allowed. For more information, see Add an Agency or Attorney.

AIM creates payment batches for the payment transactions. To update account balances, process the payment batches in Latitude. For more information, see the *Latitude* documentation.

If errors occur during import, AIM renames the import file with an ".errors" extension. AIM includes the error message in the file, after the last import record.

To view file processing history for an agency or attorney, do the steps to View File Processing History.

Recall Objection Import Process

The recall objection import process imports account recall objections that an agency or attorney submits to your organization. AIM stores the import files in the location specified in global settings. For more information, see Specify General Global Settings.

To import a recall objection file, do the steps to Import Data From a File, selecting **Recall Objection File (AOBJ)** as the file type. If AIM processes the recall objection successfully, and you set recall dates when you placed the account, AIM extends the recall dates based on the number of days allowed. For more information, see Add an Objection Reason.

AIM sets an objection flag on the accounts to exclude them from future pending and final recall files, unless you deleted the "Account is Not Currently Objected to Recall" condition.

If errors occur during import, AIM renames the import file with an ".errors" extension. AIM includes the error message in the file, after the last import record.

To view file processing history for an agency or attorney, do the steps to View File Processing History.

Close Account Import Process

The close account import process imports account closures that an agency or attorney submitted to your organization. AIM stores the import files in the location specified in global settings. For more information, see Specify General Global Settings.

To import a close account file, do the steps to Import Data From a File, selecting **Close File (ACLS)** as the file type. If AIM processes the close account import successfully, AIM moves the accounts to another desk, queue level, or both based on the agency's or attorney's settings. For more information, see Maintain a Close Status Code.

If errors occur during import, AIM renames the import file with an ".errors" extension. AIM includes the error message in the file, after the last import record.

To view file processing history for an agency or attorney, do the steps to View File Processing History.

Bankruptcy Import Process

The bankruptcy import process imports bankruptcy information that an agency or attorney submitted to your organization. AIM stores the import files in the location specified in global settings. For more information, see Specify General Global Settings.

To import a bankruptcy file, do the steps to Import Data From a File, selecting **Bankruptcy File (ABKP)** as the file type. If AIM processes the bankruptcy import successfully and the "Do Not Recall Bankruptcy Accounts" setting is not selected, AIM flags the accounts as recalled. For more information about this setting, see Add an Agency or Attorney.

AIM updates the bankruptcy information in Latitude. Based on the reported bankruptcy Chapter, AIM sets the account statuses to the status that your organization mapped to B7, B11, or B13 for the agency. For more information, see Maintain a Close Status Code.

If errors occur during import, AIM renames the import file with an ".errors" extension. AIM includes the error message in the file, after the last import record.

To view file processing history for an agency or attorney, do the steps to View File Processing History.

Deceased Debtor Import Process

The deceased debtor import process imports deceased debtor information that an agency or attorney submitted to your organization. AIM stores the import files in the location specified in global settings. For more information, see Specify General Global Settings.

To import a deceased debtor file, do the steps to Import Data From a File, selecting **Deceased File (ADEC)** as the file type. If AIM processes the deceased debtor import successfully and the "Do Not Recall Deceased Accounts" setting is not selected, AIM flags the accounts as recalled. For more information about this setting, see Add an Agency or Attorney.

AIM updates the deceased debtor information in Latitude. AIM sets the account statuses to the status that your organization mapped to DEC for the agency. For more information, see Maintain a Close Status Code.

If errors occur during import, AIM renames the import file with an ".errors" extension. AIM includes the error message in the file, after the last import record.

To view file processing history for an agency or attorney, do the steps to View File Processing History.

Demographic Import Process

The demographic import process imports address and phone number updates that an agency or attorney submitted to your organization. AIM stores the import files in the location specified in global settings. For more information, see Specify General Global Settings.

To import a demographic file, do the steps to Import Data From a File, selecting **Demographic File (ADEM)** as the file type. If AIM processes the demographic import successfully, AIM moves the existing addresses and phone numbers in Latitude to the account notes and adds the updated addresses and phone numbers.

If errors occur during import, AIM renames the import file with an ".errors" extension. AIM includes the error message in the file, after the last import record.

To view file processing history for an agency or attorney, do the steps to View File Processing History.

Acknowledgment Import Process

The acknowledgment import process imports account placement acknowledgments that an agency or attorney submitted to your organization. AIM stores the import files in the location specified in global settings. For more information, see Specify General Global Settings.

To import an acknowledgment file, do the steps to Import Data From a File, selecting **Acknowledgment File (AACK)** as the file type.

If errors occur during import, AIM renames the import file with an ".errors" extension. AIM includes the error message in the file, after the last import record. To view the errors, generate a processing report for the specific error (for example, balance mismatch). For more information, see Processing Reports.

To view file processing history for an agency or attorney, do the steps to View File Processing History. The **NumErrors** column for the acknowledgment import file signifies the number of accounts where data didn't match.

To view the number of accounts acknowledged for each agency and attorney, generate the Current Placement Report. For more information, see Generate a Current Placement Report.

Post-Dated Transactions Import Process

The post-dated transaction (PDT) import process imports post-dated transactions that an agency or attorney submitted to your organization. When you import a PDT file, it overwrites the current PDTs.

Therefore, the import file must be a complete and comprehensive list of PDTs. AIM inactivates PDTs automatically for accounts that AIM recalled, flagged for bankruptcy, flagged as deceased, or that the agency closed. AIM captures data in a separate PDT table to avoid disrupting current Latitude processes. AIM stores the import files in the location specified in global settings. For more information, see Specify General Global Settings.

To import a PDT file, do the steps to Import Data From a File, selecting **Post Dated Transaction File (APDT)** as the file type. If AIM processes the PDT import successfully, AIM adds the information to Latitude. For more information, see the *Latitude* documentation.

If errors occur during import, AIM renames the import file with an ".errors" extension. AIM includes the error message in the file, after the last import record.

To view file processing history for an agency or attorney, do the steps to View File Processing History.

To view the PDTs, generate the Active Post Dated Transactions report. For more information, see Generate an Active Post Dated Transactions Report.

Reconciliation Import Process

The reconciliation import process imports account reconciliation information that an agency or attorney submitted to your organization. AIM stores the import files in the location specified in global settings. For more information, see Specify General Global Settings.

To import a reconciliation file, do the steps to Import Data From a File, selecting **Reconciliation File (AREC)** as the file type.

If errors occur during import, AIM renames the import file with an ".errors" extension. AIM includes the error message in the file, after the last import record.

To view file processing history for an agency or attorney, do the steps to View File Processing History.

YGC Import Process

The You've Got Claims (YGC) import process imports account information that an attorney submitted to your organization using the YGC file format. AIM stores the import files in the location specified in global settings. For more information, see Specify General Global Settings.

To import a YGC file, do the steps to Import Data From a File, selecting **YGC File** as the file type. AIM supports text files with a ".txt" extension.

If errors occur during import, AIM renames the import file with an ".errors" extension. AIM includes the error message in the file, after the last import record.

To view file processing history for the attorney, do the steps to View File Processing History.

Import File Layouts

Import File Layouts

Use the **Import** feature to import all file types you received from outside agencies and attorneys. AIM moves imported files to an archive folder nested within the originating folder. AIM moves the file even when errors occur and AIM doesn't import the file successfully.

Import files use the letter "A" as the first character in the import file name to indicate that the file originated from an outside agency or attorney. For example, AXXX. AIM uses this same format in the record type name in delimited and fixed files.

Constraints

Use the following constraints when creating files:

- Strip all extraneous characters from phone numbers, postal codes, and social security numbers.

- State fields use standard abbreviations and don't contain leading spaces.

- AIM formats debtor names as last name, first name MI. Company names (as debtor) use standard format.

- Dates must be blank or contain a valid date; AIM doesn't allow zero-filled date fields.

- AIM formats date fields for delimited and fixed-length files as CCYYMMDD and for Excel and XML files as MMDDCCYY.

- AIM expects a decimal point before the last two digits for monetary fields.

- Organization's forwarding accounts determine whether the agency ID referenced in the file uses the numeric or alpha agency code. Specify this setting on the **Defaults** tab in the **Options** window.

File types

AIM supports the following file types for import:

- Return payment and adjustment

- Close and return

- Recall objection

- Demographic (phone and address) information

- Bankruptcy information

- Deceased information

- Reconciliation

- Status update

Excel file format

Excel files require the following special formatting:

- Format date fields as date/time (for example, 6/20/2008 10:30:00 AM).

- Format money fields as currency using two (2) decimal places.

> **Note:** To import YGC files, use the **All YGC Files From Folder** or **YGC File** menu options only.

Acknowledgments Import File Layout

Acknowledgments Import File Layout

The acknowledgments import file contains acknowledgment information that you received from the agencies and attorneys holding the accounts.

Acknowledgments Import File Naming Convention

Delimited or Fixed: AIMYYYYMMDDHHMMSS_####.AACK

Excel: AIMYYYYMMDDHHMMSS_####.AACK.XLS

Where #### represents the Agency code assigned to the agency that received the business.

Acknowledgment Import File Record

Delimited/fixed record type = AACK

Excel worksheet name = AcknowledgmentRecord

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1 – 4	1	record_type	String (04)	Value = AACK
File Number	5 – 13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Account	14 – 43	3	account	String (30)	Account number that the creditor assigned to this account.
Original Balance	44 – 55	4	original_balance	Decimal (12)	Original balance the agency received.
Received Date	56 – 63	5	received_date	DateTime (CCYYMMDD)	Date the agency flagged the account as received.
Current Balance	64 – 75	6	current_balance	Decimal (12)	Current balance held by agency.
Last Payment Date	76 – 83	7	last_payment_date	DateTime (CCYYMMDD)	Last date the agency received payment. For Excel file, use date/time format (for example, 6/20/2008 10:30:00 AM).
Last Payment Amount	84 – 95	8	last_payment_amount	Decimal (12)	Last payment amount the agency received (AIM expects a positive amount).
Filler	96-126		filler	String (31)	Filler for fixed file layout.

Acknowledgment Import File Trailer Record

Fixed record type = ATRL

Excel is not used.

Column	Position	Column Name	Type/Size	Comment
1	1-4	Record Type	String (4)	Value = ATRL
2	5-34	Agency ID	String (30)	Your unique agency number or alpha code.
3	35-84	Agency Name	String (50)	Your agency name.
4	85-94	Records	Integer (10)	Number of records in this file, excluding the trailer record.
5	95-106	Total Original Balance	Decimal (12)	Total original balance for accounts included in this file.
6	107-118	Total Current Balance	Decimal (12)	Total current balance for accounts included in this file.
7	119-126	Created Date	DateTime (CCYYMMDD)	File creation date.

Assets Import File Layout

Assets Import File Layout

The assets import file contains asset information that you received from the agencies and attorneys holding the accounts.

Assets Import File Naming Convention

Delimited or Fixed: AIMYYYYMMDDHHMMSS_####.AAST

Excel: AIMYYYYMMDDHHMMSS_####.AAST.XLS

Where #### represents the Agency code assigned to the agency that received the business.

Assets Import File Record

Fixed record type = AAST

Excel worksheet name = AssetRecord

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	Record_Type	String (4)	Value = AAST
Debtor ID	5-13	2	Debtor_Number	Integer (9)	Unique number assigned to each debtor record.
File Number	14-22	3	File_Number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Asset ID	23-31	4	Assets_ID	Integer (9)	Code that identifies the asset.
Asset Type ID	32-40	5	Asset_Type_ID	Integer (9)	Code that identifies the asset type.
Asset Name	41-90	6	Asset_Name	String (50)	Name of the asset.
Asset Description	91-290	7	Asset_Description	String (200)	Description of the asset.
Asset Value	291-302	8	Asset_Value	Decimal (12)	Value of the asset.
Asset Lien Value	303-314	9	Asset_Lien_Value	Decimal (12)	Lien value of the asset.
Asset Value Verified Flag	315	10	Asset_Value_Verified_Flag	String (1)	Indicates whether the agency or attorney verified the asset value.
Asset Lien Value	316	11	Asset_Lien_Value_Verified_Flag	String (1)	Indicates whether the agency or

Verified Flag					attorney verified the lien value.

Assets Import File Trailer Record

Fixed record type = ATRL

Excel is not used.

Column	Position	Column Name	Type/Size	Comment
1	1-4	Record Type	String (4)	Value = ATRL
2	5-34	Agency ID	String (30)	Your unique agency number or alpha code.
3	35-84	Agency Name	String (50)	Your agency name.
4	85-94	Records	Integer (10)	Number of records in this file, excluding the trailer record.
5	95-102	Created Date	DateTime (CCYYMMDD)	File creation date.
6	103-418	Filler	String (316)	Filler for fixed file layout.

Bankruptcy Import File Layout

Bankruptcy Import File Layout

The bankruptcy import file contains bankruptcy information that you received from the agencies and attorneys holding the accounts. Agencies and attorneys can send multiple bankruptcy records for an individual account, as AIM tracks bankruptcy information using the debtor number.

Bankruptcy Import File Naming Convention

Delimited or Fixed: AIMYYYYMMDDHHMMSS_####.ABKP

Excel: AIMYYYYMMDDHHMMSS_####.ABKP.XLS

Where #### represents the Agency code assigned to the agency that received the business.

Bankruptcy Import File Record

Delimited/fixed record type = ABKP

Excel worksheet name = BankruptcyRecord

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = ABKP
Debtor ID	5-13	2	debtor_number	Integer (9)	Unique number assigned to each debtor record.
Account ID	14-22	3	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Chapter	23-24	4	chapter	Integer (2)	Bankruptcy Chapter 7, 11, or 13.
Date Filed	25-32	5	date_filed	DateTime (CCYYMMDD)	Date the debtor filed bankruptcy.
Case Number	33-52	6	case_number	String (20)	Court case number.
Court District	53-132	7	court_district	String (80)	Court district where the debtor filed bankruptcy.
Court Division	133-212	8	court_division	String (80)	Division of the court where the debtor filed bankruptcy.
Court Phone	213-242	9	court_phone	String (30)	Court clerk's phone number.
Court Street1	243-370	10	court_street1	String (128)	Court's address line 1.

Court Street2	371-498	11	court_street2	String (128)	Court's address line 2.
Court City	499-548	12	court_city	String (50)	Court's city.
Court State	549-551	13	court_state	String (3)	Court's state.
Court ZIP Code	552-561	14	court_zipcode	String (10)	Court's postal code.
Trustee	562-611	15	trustee	String (50)	Trustee's name.
Trustee Street1	612-739	16	trustee_street1	String (128)	Trustee's address line 1.
Trustee Street2	740-867	17	trustee_street2	String (128)	Trustee's address line 2.
Trustee City	868-917	18	trustee_city	String (50)	Trustee's city.
Trustee State	918-920	19	trustee_state	String (3)	Trustee's state.
Trustee ZIP Code	921-930	20	trustee_zipcode	String (10)	Trustee's postal code.
Trustee Phone	931-960	21	trustee_phone	String (30)	Trustee's phone number.
Has 341 Info	961	22	three_forty_one_info_flag	Boolean (1)	341 indicator (90 or 1).
Date Time 341	962-969	23	three_forty_one_date	Date (CCYYMMDD)	341 date.
Location 341	970-1049	24	three_forty_one_location	String (80)	341 location.
Comments	1050-1349	25	comments	String (300)	Bankruptcy comments.

Status	1350-1449	26	status	String (100)	Description of the account status.
Transmitted Date	1450-1457	27	transmit_date	DateTime (CCYYMMDD)	Date you received the information.
Notice Received	1458-1465	28	notice_date	DateTime (CCYYMMDD)	Date the client received a notice that the customer filed for bankruptcy.
Proof of Claim	1466-1473	29	proof_filed_date	DateTime (CCYYMMDD)	Date the client sent a proof of claim to the court.
Discharge Date	1474-1481	30	discharge_date	DateTime (CCYYMMDD)	Date the court discharged the bankruptcy.
Dismissal Date	1482-1489	31	dismissal_date	DateTime (CCYYMMDD)	Date the court dismissed the bankruptcy.
Confirm Hearing	1490-1497	32	confirmation_hearing_date	DateTime (CCYYMMDD)	Date the court set the confirmation hearing.
Reaffirmation Filed Date	1498-1505	33	reaffirm_filed_date	DateTime (CCYYMMDD)	Date the customer filed the reaffirmation with the court.
Voluntary Date	1506-1513	34	voluntary_date	DateTime (CCYYMMDD)	Date the customer volunteered to pay off the debt.

Surrender Date	1514-1521	35	surrender_date	DateTime (CCYYMMDD)	Date the customer surrendered the item.
Auction Date	1522-1529	36	auction_date	DateTime (CCYYMMDD)	Date the auction house auctioned the surrendered item.
Reaffirmation Amount	1530-1541	37	reaffirm_amount	Decimal (12)	Amount that the customer reaffirmed to pay.
Voluntary Amount	1542-1553	38	voluntary_amount	Decimal (12)	Amount the customer volunteered to pay.
Auction Amount	1554-1565	39	auction_amount	Decimal (12)	Amount the auction house received for the surrendered item.
Auction Fee Amount	1566-1577	40	auction_fee_amount	Decimal (12)	Fee the auction house charged for auctioning the surrendered item.
Auction Amount Applied	1578-1589	41	auction_applied_amount	Decimal (12)	Amount of the auction funds applied to the account.
Secured Amount	1590-1601	42	secured_amount	Decimal (12)	Amount of the debt that is secured. Chapters 11, 12, and 13 only.

Secured Plan Percent	1602-1613	43	secured_percentage	Decimal (12)	Percentage of the secured amount for which the customer remains responsible. Chapters 11, 12, and 13 only.
Unsecured Amount	1614-1625	44	unsecured_amount	Decimal (12)	Amount of the debt that is unsecured. Chapters 11, 12, and 13 only.
Unsecured Plan Percent	1626-1637	45	unsecured_percentage	Decimal (12)	Percentage of the unsecured amount for which the customer remains responsible. Chapters 11, 12, and 13 only.
Converted Chapter	1638-1639	46	converted_from_chapter	Integer (2)	Original bankruptcy chapter number.
Has Asset	1640	47	has_asset	String (1)	Customer has assets to secure the debt. Chapter 7 only.
Reaffirmation	1641	48	reaffirm_flag	String (1)	Indicates whether the customer reaffirmed the debt under new terms.

Reaffirmation Terms	1642-1691	49	reaffirm_terms	String (50)	Agreed upon terms of the reaffirmation.
Terms	1692-1741	50	voluntary_terms	String (50)	Terms of payment.
Surrender Method	1742-1791	51	surrender_method	String (50)	How the customer surrendered the item (for example, shipped or picked up).
Auction House	1792-1841	52	auction_house	String (50)	Name of the auction house that auctioned the surrendered item.
Country	1842-1969	53	country	String (128)	Country where the customer filed bankruptcy.
County	1970-2097	54	county	String (128)	County where the customer filed bankruptcy.

Bankruptcy Import File Trailer Record

Fixed record type = ATRL

Excel is not used.

Column	Position	Column Name	Type/Size	Comment
1	1-4	Record Type	String (4)	Value = ATRL
2	5-34	Agency ID	String (30)	Your unique agency number or alpha code.

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3	35-84	Agency Name	String (50)	Your agency name.
4	85-94	Records	Integer (10)	Number of records in this file, excluding the trailer record.
5	95-102	Created Date	DateTime (CCYYMMDD)	File creation date.
6	103-2097	Filler	String (1995)	Filler for fixed file layout.

Close Import File Layout

Close Import File Layout

The close import file contains closed accounts that you received from the agencies and attorneys holding the accounts.

Close Import File Naming Convention

Delimited or Fixed: AIMYYYYMMDDHHMMSS_####.ACLS

Excel: AIMYYYYMMDDHHMMSS_####.ACLS.XLS

Where #### represents the agency code assigned to the agency that is receiving the business.

Close Import File Record

Delimited/fixed record type = ACLS

Excel worksheet name = CloseRecord

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = ACLS
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each debtor record.
Account	14-43	3	account	String (30)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Close Status Code	44-46	4	close_status_code	String (3)	Bankruptcy Chapter 7, 11, or 13.

Close Date	47-54	5	close_date	DateTime (CCYYMMDD)	Date the debtor filed bankruptcy.
Filler	55-102	6	Filler	String (48)	Filler for fixed file layout.

Close Import File Trailer Record

Fixed record type = ATRL

Excel is not used.

Column	Position	Column Name	Type/Size	Comment
1	1-4	Record Type	String (4)	Value = ATRL
2	5-34	Agency ID	String (30)	Your unique agency number or alpha code.
3	35-84	Agency Name	String (50)	Your agency name.
4	85-94	Records	Integer (10)	Number of records in this file, excluding the trailer record.
5	95-102	Created Date	DateTime (CCYYMMDD)	File creation date.

Complaints Import File Layout

Complaints Import File Layout

The complaints import file contains complaint information that you received from the agencies and attorneys holding the accounts. Agencies and attorneys can send multiple complaint records for an individual account, as AIM tracks complaint information using the debtor number.

Note: The complaints import feature is not available for AIM versions earlier than version 12.0.

Complaints Import File Naming Convention

Delimited or Fixed: AIMYYYYMMDDHHMMSS_####.ACPT

Excel: AIMYYYYMMDDHHMMSS_####.ACPT.XLS

Where #### represents the Agency code assigned to the agency that received the business.

Complaints Import File Record

Delimited/fixed record type = ACPT

Excel worksheet name = ComplaintRecord

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Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = ACPT
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Debtor Number	14-22	3	debtor_number	Integer (9)	Unique number assigned to each debtor record.
Source	23-42	4	source	String (20)	
ID	43-51	5	id	Integer (9)	
Receiver Complaint ID	52-60	6	receiver_complaint_id	Integer (9)	
Against Code	61-70	7	against_code	String (10)	Category for who or what the complaint is against, such as third party, branch, department, or user.
Against	71-120	8	against	String (50)	Who or what the complaint is against.
Against Entity	121-375	9	against_entity	String (255)	User who specified who or what the complaint is against.

Category	376-395	10	category	String (20)	Complaint category, such as branch or department.
Compensation Amount	396-407	11	compensation_amount	Decimal (12)	Amount of compensation the debtor received.
Conclusion	408-907	12	conclusion	String (500)	Based on the investigation, the conclusion regarding the complaint.
Date Closed	908-916	13	date_closed	DateTime (CCYYMMDD)	Date your organization closed the complaint.
Date in Admin	917-925	14	date_in_admin	DateTime (CCYYMMDD)	
Date Received	926-934	15	date_received	DateTime (CCYYMMDD)	Date your organization received the complaint.
Deleted	935-935	16	deleted	String (1)	Indicates whether a user deleted the complaint.
Details	936-1435	17	details	String (500)	Details regarding the complaint.
Dissatisfaction	1436-1436	18	dissatisfaction	String (1)	Indicates whether the debtor is dissatisfied.

Dissatisfaction Date	1437-1445	19	dissatisfaction_date	DateTime (CCYYMMDD)	Date the debtor indicated dissatisfaction.
Grievances	1446-1945	20	grievances	String (500)	List of the debtor's grievances.
Investigation Comments to Date	1946-2445	21	investigation_comments_to_date	String (500)	Details regarding the complaint investigation.
Justified Code	2446-2455	22	justified_code	String (10)	Code that identifies the complaint justification type.
Justified	2456-2505	23	justified	String (50)	Indicates whether the complaint is justified.
Outcome Code	2506-2515	24	outcome_code	String (10)	Code that identifies the complaint outcome type.
Outcome	2516-2565	25	outcome	String (50)	Outcome of the complaint, such as training required or disciplinary action. Selecting an outcome closes the complaint.
Owner	2566-2575	26	owner	String (10)	

Recourse Date	2576-2583	27	recourse_date	DateTime (CCYYMMDD)	Recourse approval date.
Referred by	2584-2593	28	referred_by	String (10)	Person who referred the complaint, such as third party, customer, or user.
Root Cause Code	2594-2603	29	root_cause_code	String (10)	Code that identifies the complaint root cause type.
Root Cause	2604-2653	30	root_cause	String (50)	Root cause of the complaint.
SLA Days	2654-2662	31	sla_days	Integer (9)	Number of days after receiving the complaint that you have to resolve it before breaching the SLA.
Status Code	2663-2672	32	status_code	String (10)	Code that identifies the complaint status type.
Status	2673-2722	33	status	String (50)	Status of the complaint.
Type Code	2723-2732	34	type_code	String (10)	Code that identifies the complaint type.
Type	2733-2782	35	type	String (50)	Type of complaint, such as human

					or system error.

Complaints Import File Trailer Record

Fixed record type = ACPT

Excel is not used.

Column	Position	Column Name	Type/Size	Comment
1	1-4	Record Type	String (4)	Value = ATRL
2	5-34	Agency ID	String (30)	Your unique agency number or alpha code.
3	35-84	Agency Name	String (50)	Your agency name.
4	85-94	Records	Integer (10)	Number of records in this file, excluding the trailer record.
5	95-102	Created Date	DateTime (CCYYMMDD)	File creation date.

Deceased Import File Layout

Deceased Import File Layout

The deceased import file contains deceased debtor information that you received from the agencies and attorneys holding the accounts. Agencies and attorneys can send multiple decease records for an individual account, as AIM tracks deceased information using the debtor number.

Deceased Import File Naming Convention

Delimited or Fixed: AIMYYYYMMDDHHMMSS_####.ADEC

Excel: AIMYYYYMMDDHHMMSS_####.ADEC.XLS

Where #### represents the Agency code assigned to the agency that received the business.

Deceased Import File Record

Delimited/fixed record type = ADEC

Excel worksheet name = DeceasedRecord

Latitude	Position	Col	Column Name	Format	Comment

Record Type	1-4	1	record_type	String (4)	Value = ADEC
Debtor ID	5-13	2	debtor_number	Integer (9)	Unique number assigned to each debtor record.
File Number	14-22	3	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
SSN	23-31	4	ssn	String (9)	Deceased debtor's SSN.
First Name	32-61	5	first_name	String (30)	Deceased debtor's first name.
Last Name	62-91	6	last_name	String (30)	Deceased debtor's last name.
State	92-94	7	state	String (3)	Deceased debtor's state.
Postal Code	95-104	8	postal_code	String (10)	Deceased debtor's postal code.
Date of Birth	105-112	9	date_of_birth	DateTime (CCYYMMDD)	Deceased debtor's date of birth.
Date of Death	113-120	10	date_of_death	DateTime (CCYYMMDD)	Deceased debtor's date of death.
Match Code	121-125	11	match_code	String (5)	Match code.
Transmit Date	126-133	12	transmit_date	DateTime (CCYYMMDD)	Date you transmitted the information. For Excel file, use date/time format (for example, 6/20/2008 10:30:00 AM).
Claim Deadline	134-141	13	claim_deadline_date	DateTime (CCYYMMDD)	Deadline for filing a claim against the customer's estate.

Date Filed	142-149	14	filed_date	DateTime (CCYYMMDD)	Date the client filed a claim against the customer's estate.
Case Number	150-169	15	case_number	String (20)	Claim case number.
Executor	170-219	16	executor	String (50)	Name of the executor of the customer's estate.
Executor Phone	220-269	17	executor_phone	String (50)	Executor's phone number.
Executor Fax	270-319	18	executor_fax	String (50)	Executor's fax number.
Executor Street 1	320-447	19	executor_street1	String (128)	Executor's street address line 1.
Executor Street 2	448-575	20	executor_street2	String (128)	Executor's street address line 2.
Executor State	576-578	21	executor_state	String (3)	Executor's state.
Executor City	579-678	22	executor_city	String (100)	Executor's city.
Executor Postal Code	679-688	23	executor_zipcode	String (10)	Executor's postal code.
Court City	689-738	24	court_city	String (50)	Court's city.
Court District	739-938	25	court_district	String (200)	Court district handling the customer's estate.
Court Division	939-1038	26	court_division	String (100)	Court division handling the customer's estate.
Court Phone	1039-1088	27	court_phone	String (50)	Court's phone number.

Court Street 1	1089-1216	28	court_street1	String (128)	Court's street address line 1.
Court Street 2	1217-1344	29	court_street2	String (128)	Court's street address line 2.
Court State	1345-1347	30	court_state	String (3)	Court's state.
Court Postal Code	1348-1362	31	court_zipcode	String (15)	Court's postal code.
Country	1363-1490	32	country	String (128)	Executor's country.
County	1491-1618	33	county	String (128)	Executor's county.

Deceased Import File Trailer Record

Fixed record type = ATRL

Excel is not used.

Column	Position	Column Name	Type/Size	Comment
1	1-4	Record Type	String (4)	Value = ATRL
2	5-34	Agency ID	String (30)	Your unique agency number or alpha code.
3	35-84	Agency Name	String (50)	Your agency name.
4	85-94	Records	Integer (10)	Number of records in this file, excluding the trailer record.
5	95-102	Created Date	DateTime (CCYYMMDD)	File creation date.
6	103-1618	Filler	String (1516)	Filler for fixed file layout.

Demographics Import File Layout

Demographics Import File Layout

The demographics import file contains updated phone number and address information that you received from the agencies and attorneys holding the accounts. Agencies and attorneys can send multiple phone and address records for an individual account, as AIM tracks this information using the debtor ID.

Demographics Import File Naming Convention

Delimited or Fixed: AIMYYYYMMDDHHMMSS_####.ADEM

Excel: AIMYYYYMMDDHHMMSS_####.ADEM.XLS
NOTE: Excel files must contain a worksheet for PhoneRecord, PhonePanelRecord, and AddressRecord.

Where #### represents the Agency code assigned to the agency that received the business.

Demographics Import File Address Record

Delimited/fixed record type = AUAD

Excel worksheet name = AddressRecord

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = AUAD
Debtor ID	5–13	2	debtor_number	Integer (9)	Unique number assigned to each debtor record.
File Number	14–22	3	file_number	Integer (9)	Unique number assigned to each account placed in Latitude. Use this value for all data sent to AIM.
New Street 1	23-150	4	new_street1	String (128)	Debtor's new street address line 1.
New Street 2	151-278	5	new_street2	String (128)	Debtor's new street address line 2.
New City	279-308	6	new_city	String (30)	Debtor's new city.
New State	309-311	7	new_state	String (3)	Debtor's new state.
New ZIP Code	312-321	8	new_zipcode	String (10)	Debtor's new postal code.

Old Street 1	322-449	9	old_street1	String (128)	Debtor's previous street address line 1.
Old Street 2	450-577	10	old_street2	String (128)	Debtor's previous street address line 2.
Old City	578-607	11	old_city	String (30)	Debtor's previous city.
Old State	608-610	12	old_state	String (3)	Debtor's previous state.
Old ZIP Code	611-620	13	old_zipcode	String (10)	Debtor's previous postal code.
Date Updated	621-628	14	date_updated	DateTime (CCYYMMDD)	Date you updated the address. For Excel file, use date/time format (for example, 6/20/2008 10:30:00 AM).

Demographics Import File Phone Record

Delimited/fixed record type = AUPH

Excel worksheet name = PhoneRecord

Latitude	Position	Col	Column Name	Format	Comment	
Record Type	1-4	1	record_type	String (4)	Value = AUPH	
Debtor ID	5–13	2	debtor_number	Integer (9)	Unique number assigned to each this value for all data sent to AIM debtor.	
File Number	14–22	3	file_number	Integer (9)	Unique number assigned to each (zero padded). Use this value for a	
Phone Type	23	4	phone_type	Integer (1)	1 = Home 2 = Work 3 = Cell	4 = Fax 5 = Spouse Home 6 = Spouse Work
New Number	24-53	5	new_number	String (30)	Debtor's current phone number.	
Old Number	54-83	6	old_number	String (30)	Debtor's previous phone number.	

Date Updated	84-91	7	date_updated	DateTime (CCYYMMDD)	Date you updated the phone num
Filler	92-628	8	Filler	String (537)	Filler for fixed file layout. Delimite reference.

Demographics Import File Phone Panel Record

Delimited/fixed record type = AUPP

Excel worksheet name = PhonePanelRecord

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = AUPP
Debtor ID	5–13	2	debtor	Integer (9)	Unique number assigned to each debtor record. Use this value for all data sent to AIM to identify the debtor.
File Number	14–22	3	file_number	Integer (9)	Unique number assigned to each account placed (zero padded). Use this value for all data sent to AIM.
Relationship	23-72	4	relationship	String (50)	Debtor's relationship to the account.
Phone Type	73	5	phone_type	Integer (1)	1 = Home 2 = Work 3 = Cell 4 = Fax 5 = Spouse Home 6 = Spouse Work
Phone Status ID	74	6	phone_status_id	Integer (1)	1 = Bad 2 = Good
On Hold	75	7	on_hold	Boolean (1)	0 = Not on hold 1 = On hold
Phone Number	76-105	8	phone_number	String (30)	Debtor's phone number.

Phone Extension	106-115	9	phone_ext	String (10)	Debtor's phone extension.
Phone Name	116-145	10	phone_name	String (30)	Name for phone record.
Source	146-175	11	source	String (30)	Method for adding phone information: USER = User added manually CONVERSION = Converted from old system SYNC = Matched from a linked account
Consent to Call	176-176	12	AllowManualCall	String (1)	Indicates whether the party on the account granted permission to allow calls to the phone number.
Consent to Auto Dial	177-177	13	AllowAutoDialer	String (1)	Indicates whether the party on the account granted permission to allow calls to the phone number using a dialer campaign.
Consent to Fax	178-178	14	AllowFax	String (1)	Indicates whether the party on the account granted permission to allow sending faxes to the phone number.
Consent to SMS	179-179	15	AllowText	String (1)	Indicates whether the party on the account granted permission to allow sending texts to the phone number.
Method	180-180	16	WrittenConsent	String (1)	Indicates whether the party on the account granted permission in writing.
Obtained From	181-280	17	ObtainedFrom	String (100)	Party on the account who granted or denied permission to contact the phone number.

Effective Date	280-287	18	EffectiveDate	DateTime (MMDDYYYY)	Date the party on the account granted or denied permission to contact the phone number.
Comment	288-407	19	Comment	String (120)	Details about permission to contact the phone number.
Filler	408-628	20	Filler	String (221)	Filler for fixed file layout. Delimited expects reference.

Demographics Import File Trailer Record

Fixed record type = ATRL

Excel is not used.

Column	Position	Column Name	Type/Size	Comment
1	1-4	Record Type	String (4)	Value = ATRL
2	5-34	Agency ID	String (30)	Your unique agency number or alpha code.
3	35-84	Agency Name	String (50)	Your agency name.
4	85-94	Records	Integer (10)	Number of records in this file, excluding the trailer record.
5	95-102	Created Date	DateTime (CCYYMMDD)	File creation date.
6	103-628	Filler	String (526)	Filler for fixed file layout.

Disputes Import File Layout

Disputes Import File Layout

The disputes import file contains dispute information that you received from the agencies and attorneys holding the accounts. Agencies and attorneys can send multiple dispute records for an individual account, as AIM tracks dispute information using the debtor number.

Note: The disputes import feature is not available for AIM versions earlier than version 12.0.

Disputes Import File Naming Convention

Delimited or Fixed: AIMYYYYMMDDHHMMSS_####.ADIS

Excel: AIMYYYYMMDDHHMMSS_####.ADIS.XLS

Where #### represents the Agency code assigned to the agency that received the business.

Disputes Import File Record

Delimited/fixed record type = ADIS

Excel worksheet name = DisputeRecord

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = ADIS
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Debtor Number	14-22	3	debtor_number	Integer (9)	Unique number assigned to each debtor record.
Source	23-42	4	source	String (20)	
ID	43-51	5	id	Integer (9)	
Receiver Dispute ID	52-60	6	receiver_dispute_id	Integer (9)	
Type Code	61-70	7	type_code	String (10)	Code that identifies the dispute type.
Type	71-120	8	type	String (50)	Type of dispute, such as possible fraud or incorrect trace.

Date Received	121-128	9	date_received	DateTime (CCYYMMDD)	Dispute received date.
Referred by Code	129-138	10	referred_by_code	String (10)	Code that identifies the person who referred the dispute.
Referred by	139-188	11	referred_by	String (50)	Person who referred the dispute, such as a third party or the customer.
Details	189-688	12	details	String (500)	Details regarding the dispute.
Category Code	689-698	13	category_code	String (10)	Code that identifies the dispute category.
Category	699-748	14	category	String (50)	Dispute category, such as fraud or wrong trace.
Against Code	749-758	15	against_code	String (10)	Code that identifies the person that the dispute is against.
Against	759-808	16	against	String (50)	Person that the dispute is against, such as customer or third party.
Date Closed	809-816	17	date_closed	DateTime (CCYYMMDD)	Date your organization closed the dispute. When you close the dispute or specify an outcome, Latitude populates this box

					with the current date.
Recourse Date	817-824	18	recourse_date	DateTime (CCYYMMDD)	Recourse approval date.
Justified	825-834	19	justified	String (10)	Indicates whether the dispute is justified.
Outcome Code	835-844	20	outcome_code	String (10)	Code that identifies the dispute outcome type.
Outcome	845-894	21	outcome	String (50)	Outcome of the dispute, such as unable to resolve. Selecting an outcome closes the dispute.
Deleted	895-895	22	deleted	String (1)	Indicates whether a user deleted the dispute.
Proof Required	896-896	23	proof_required	String (1)	Indicates whether your organization requires proof of the dispute.
Proof Requested	897-897	24	proof_requested	String (1)	Indicates whether your organization requested proof of the dispute.
Insufficient Proof Received	898-898	25	insufficient_proof_received	String (1)	Indicates whether your organization received proof that is insufficient.
Proof Received	899-899	26	proof_received	String (1)	Indicates whether your organization

					received proof of the dispute.

Disputes Import File Trailer Record

Fixed record type = ADIS

Excel is not used.

Column	Position	Column Name	Type/Size	Comment
1	1-4	Record Type	String (4)	Value = ATRL
2	5-34	Agency ID	String (30)	Your unique agency number or alpha code.
3	35-84	Agency Name	String (50)	Your agency name.
4	85-94	Records	Integer (10)	Number of records in this file, excluding the trailer record.
5	95-102	Created Date	DateTime (CCYYMMDD)	File creation date.

Judgments Import File Layout

Judgments Import File Layout

The judgments import file contains judgment information that you received from the agencies and attorneys holding the accounts. There are two scenarios where AIM cannot record a judgment in Latitude automatically. The first is when the account doesn't have transactions between the judgment date and the import date. The second is when all required information isn't available in the import file (for example, suit date, judgment date, judgment principal, or interest rate). If either of these scenarios is true, record the judgment in Latitude manually.

Judgments Import File Naming Convention

Delimited or Fixed: AIMYYYYMMDDHHMMSS_####.AJDG

Excel: AIMYYYYMMDDHHMMSS_####.AJDG.XLS

Where #### represents the agency code assigned to the agency that received the business.

Judgments Import File Record

Delimited/fixed record type = AJDG

Excel worksheet name = JudgmentRecord

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = AJDG
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Judgment Flag	14	3	JudgmentFlag	String (1)	Contains the value "U" for update.
Case Number	15-64	4	CaseNumber	String (50)	Court case number.
Judgment Amt	65-76	5	JudgmentAmt	Decimal (12)	Principal amount awarded in the judgment.
Judgment Int Award	77-88	6	JudgmentIntAward	Decimal (12)	Interest amount awarded in the judgment.
Judgment Cost Award	89-100	7	JudgmentCostAward	Decimal (12)	Costs and fees awarded in the judgment.
Judgment Attorney Cost Award	101-112	8	JudgmentAttorneyCostAward	Decimal (12)	Attorney costs awarded in the judgment.
Judgment Other Award	113-124	9	JudgmentOtherAward	Decimal (12)	Other dollar amount awarded in the judgment.
Judgment Int Rate	125-129	10	JudgmentIntRate	Decimal (5)	New interest rate awarded in the judgment.

Int From Date	130-137	11	IntFromDate	Date (CCYYMMDD)	Date the new interest rate takes effect.
Attorney Ack Date	138-145	12	AttorneyAckDate	Date (CCYYMMDD)	Date the attorney acknowledged placement of the account.
Date Filed	146-153	13	DateFiled	Date (CCYYMMDD)	Date the creditor filed the suit against the debtor.
Service Date	154-161	14	ServiceDate	Date (CCYYMMDD)	Date the court served the debtor.
Judgment Date	162-169	15	JudgmentDate	Date (CCYYMMDD)	Date the court awarded judgment.
Judgment Recorded Date	170-177	16	JudgmentRecordedDate	Date (CCYYMMDD)	Date the clerk recorded the judgment.
Date Answered	178-185	17	DateAnswered	Date (CCYYMMDD)	Date the debtor answered the judgment.
Statute Deadline	186-193	18	StatuteDeadline	Date (CCYYMMDD)	Statute of limitations deadline.
Court Date	194-201	19	CourtDate	Date (CCYYMMDD)	Court date.
Discovery Cutoff	202-209	20	DiscoveryCutoff	Date (CCYYMMDD)	Cutoff date for discovery.
Discovery Reply Date	210-217	21	DiscoveryReplyDate	Date (CCYYMMDD)	Discovery reply date.

Motion Cutoff	218-225	22	MotionCutoff	Date (CCYYMMDD)	Cutoff date for filing motions.
Arbitration Date	226-233	23	ArbitrationDate	Date (CCYYMMDD)	Arbitration date.
Last Summary Judgment Date	234-241	24	LastSummaryJudgmentDate	Date (CCYYMMDD)	Last summary judgment date.
Status	242-291	25	Status	String (50)	Status of the court case.
Service Type	292-311	26	ServiceType	String (20)	Type of service performed.
Misc Info 1	312-411	27	MiscInfo1	String (100)	Miscellaneous information.
Misc Info 2	412-511	28	MiscInfo2	String (100)	Miscellaneous information.
Remarks	512-611	29	Remarks	String (100)	Comments regarding the judgment.
Plaintiff	612-711	30	Plaintiff	String (100)	Plaintiff in the case.
Defendant	712-811	31	Defendant	String (100)	Defendant in the case.
Judgment Book	812-831	32	JudgmentBook	String (20)	Number of the local records book where the clerk recorded the judgment.
Judgment Page	832-851	33	JudgmentPage	String (20)	Page in the local records book where the clerk

					recorded the judgment.
Judge	852-951	34	Judge	String (100)	Judge who is presiding over the case.
Court Room	952-966	35	CourtRoom	String (15)	Court room for hearing the case.
Court Name	967-1016	36	CourtName	String (50)	Name of the court.
Court County	1017-1066	37	CourtCounty	String (50)	Court's county.
Court Street 1	1067-1116	38	CourtStreet1	String (50)	Court's street address line 1.
Court Street 2	1117-1166	39	CourtStreet2	String (50)	Court's street address line 2.
Court City	1167-1216	40	CourtCity	String (50)	Court's city.
Court State	1217-1221	41	CourtState	String (5)	Court's state.
Court Zipcode	1222-1231	42	CourtZipcode	String (10)	Court's postal code.
Court Phone	1232-1281	43	CourtPhone	String (50)	Court's phone number.
Court Fax	1282-1331	44	CourtFax	String (50)	Court's fax number.
Court Salutation	1332-1381	45	CourtSalutation	String (50)	Court's salutation.
Court Clerk First Name	1382-1431	46	CourtClerkFirstName	String (50)	Court clerk's first name.

Court Clerk Middle Name	1432-1481	47	CourtClerkMiddleName	String (50)	Court clerk's middle name.
Court Clerk Last Name	1482-1531	48	CourtClerkLastName	String (50)	Court clerk's last name.
Court Notes	1532-1781	49	CourtNotes	String (250)	Court notes.

Judgments Import File Trailer Record

Fixed record type = ATRL

Excel is not used.

Column	Position	Column Name	Type/Size	Comment
1	1-4	Record Type	String (4)	Value = ATRL
2	5-34	Agency ID	String (30)	Your unique agency number or alpha code.
3	35-84	Agency Name	String (50)	Your agency name.
4	85-94	Records	Integer (10)	Number of records in this file, excluding the trailer record.
5	95-102	Created Date	DateTime (CCYYMMDD)	File creation date.
6	103-1781	Filler	String (1679)	Filler for fixed file layout.

Notes Import File Layout

Notes Import File Layout

The notes import file contains notes and events that you received from the agencies or attorneys holding the accounts. The system doesn't include system-generated notes or events in the import file.

Notes Import File Naming Convention

Delimited or Fixed: AIMYYYYMMDDHHMMSS_####.ANOT

Excel: AIMYYYYMMDDHHMMSS_####.ANOT.XLS

Where #### represents the Agency code assigned to the agency that received the business.

Notes Import File Record

Delimited/fixed record type = ANOT

Excel worksheet name = NoteRecord

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = ANOT
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Created DateTime	14-27	3	created_datetime	DateTime (CCYYMMDDHHMMSS)	Date and time you created the note.
Note Action	28-33	4	note_action	String (6)	Action code associated to the note.
Note Result	34-39	5	note_result	String (6)	Result code associated to the note.
Note Comment	40-339	6	note_comment	String (300)	Comment regarding the note.
Is Private	340	7	is_private	String (1)	Indicates whether the note is private. Only users with the appropriate permissions can view private notes in Latitude.

Notes Import File Trailer Record

Fixed record type = ATRL

Excel is not used.

Column	Position	Column Name	Type/Size	Comment
1	1-4	Record Type	String (4)	Value = ATRL
2	5-34	Agency ID	String (30)	Your unique agency number or alpha code.
3	35-84	Agency Name	String (50)	Your agency name.
4	85-94	Records	Integer (10)	Number of records in this file, excluding the trailer record.
5	95-102	Created Date	DateTime (CCYYMMDD)	File creation date.
6	103-340	Filler	String (238)	Filler for fixed file layout.

Payments Import File Layout

Payments Import File Layout

The payments import file contains payments and adjustments that you received from the agencies and attorneys holding the accounts.

Payments Import File Naming Convention

Delimited or Fixed: AIMYYYYMMDDHHMMSS_####.APAY

Excel: AIMYYYYMMDDHHMMSS_####.APAY.XLS

Where #### represents the Agency code assigned to the agency that is receiving the business.

Payments Import File Record

Fixed record type = APAY

Excel worksheet name = PaymentRecord

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = APAY
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use

					this value for all data sent to AIM.
Account	14-43	3	account	String (30)	Account number that the creditor assigned to this account.
Payment Amount	44-55	4	payment_amount	Decimal (12)	Principal payment amount (always a positive amount).
Payment Date	56-63	5	payment_date	DateTime (CCYYMMDD)	Date the agency received the payment. For Excel file, use date/time format (for example, 6/20/2008 10:30:00 AM).
Payment Type	64-66	6	payment_type	String (3)	Type of payment batch. PA = Payment PAR - Payment reversal
Payment Identifier	67-96	7	payment_identifier	String (30)	Unique code that identifies the payment.
Comment	97-126	8	comment	String (30)	Description of the payment transaction.
Payment Amount Bucket 1	127-138	9	payment_amount_bucket1	Decimal (12)	Amount of payment to apply toward money bucket 1.
Payment Amount Bucket 2	139-150	10	payment_amount_bucket2	Decimal (12)	Amount of payment to apply toward money bucket 2.

Payment Amount Bucket 3	151-162	11	payment_amount_bucket3	Decimal (12)	Amount of payment to apply toward money bucket 3.
Payment Amount Bucket 4	163-174	12	payment_amount_bucket4	Decimal (12)	Amount of payment to apply toward money bucket 4.
Payment Amount Bucket 5	175-186	13	payment_amount_bucket5	Decimal (12)	Amount of payment to apply toward money bucket 5.
Payment Amount Bucket 6	187-198	14	payment_amount_bucket6	Decimal (12)	Amount of payment to apply toward money bucket 6.
Payment Amount Bucket 7	199-210	15	payment_amount_bucket7	Decimal (12)	Amount of payment to apply toward money bucket 7.
Payment Amount Bucket 8	211-222	16	payment_amount_bucket8	Decimal (12)	Amount of payment to apply toward money bucket 8.
Payment Amount Bucket 9	223-234	17	payment_amount_bucket9	Decimal (12)	Amount of payment to apply toward money bucket 9.
Payment Method	235-264	18	payment_method	String (30)	Payment method to use to process the payments.
Is SIF	265	19	is_SIF	String (1)	Indicates whether this payment arrangement settles the account in full, regardless of the account balance.
Fee Amount	266-277	20	fee_amount	Decimal (12)	Total fees associated to the payment.

Fee Amount Bucket 1	278-289	21	fee_amount_bucket1	Decimal (12)	Amount of fee to apply toward money bucket 1.
Fee Amount Bucket 2	290-301	22	fee_amount_bucket2	Decimal (12)	Amount of fee to apply toward money bucket 2.
Fee Amount Bucket 3	302-313	23	fee_amount_bucket3	Decimal (12)	Amount of fee to apply toward money bucket 3.
Fee Amount Bucket 4	314-325	24	fee_amount_bucket4	Decimal (12)	Amount of fee to apply toward money bucket 4.
Fee Amount Bucket 5	326-337	25	fee_amount_bucket5	Decimal (12)	Amount of fee to apply toward money bucket 5.
Fee Amount Bucket 6	338-349	26	fee_amount_bucket6	Decimal (12)	Amount of fee to apply toward money bucket 6.
Fee Amount Bucket 7	350-361	27	fee_amount_bucket7	Decimal (12)	Amount of fee to apply toward money bucket 7.
Fee Amount Bucket 8	362-373	28	fee_amount_bucket8	Decimal (12)	Amount of fee to apply toward money bucket 8.
Fee Amount Bucket 9	374-385	29	fee_amount_bucket9	Decimal (12)	Amount of fee to apply toward money bucket 9.
Remit Amount	386-397	30	remit_amount	Decimal (12)	Amount of the payment remitted.
Invoice ID	398-447	31	invoice_identifier	String (50)	Unique code that identifies the invoice that includes the payment.

Payments Import File Trailer Record

Fixed record type = ATRL

Excel is not used.

Column	Position	Column Name	Type/Size	Comment
1	1-4	Record Type	String (4)	Value = ATRL
2	5-34	Agency ID	String (30)	Your unique agency number or alpha code.
3	35-84	Agency Name	String (50)	Your agency name.
4	85-94	Records	Integer (10)	Number of records in this file, excluding the trailer record.
5	95-106	Payments	Decimal (12)	Total payments.
6	107-114	Created Date	DateTime (CCYYMMDD)	File creation date.
7	115-447	Filler	String (333)	Filler for fixed file layout.

Post-Dated Transactions Import File Layout

Post-Dated Transactions Import File Layout

The post-dated transactions import file contains post-dated transactions (PDTs) that you received from the agencies and attorneys holding the accounts. Your organization can import the files to record notifications of pending promises in your system for accounts the agency or attorney holds. These transactions are available for review in the **Active Post Dated Transactions** report, which includes all active post-dates the agency or attorney sent. For more information, see Generate an Active Post Dated Transactions Report.

When AIM processes a new PDT import file, it flags previous PDT transactions as "inactive." Each agency or attorney must send the entire collection of PDTs every time the agency or attorney submits a file. For recalled, closed, bankruptcy, and deceased debtor accounts, AIM sets the PDT transactions to inactive.

You can view detailed information for PDT transactions in the **AIM** panel of the **Work Form** in Latitude.

Post-Dated Transactions Import File Naming Convention

Delimited or Fixed: AIMYYYYMMDDHHMMSS_####.APDT

Excel: AIMYYYYMMDDHHMMSS_####.APDT.XLS

Where #### represents the Agency code assigned to the agency that received the business.

Post-Dated Transactions Import File Record

Fixed record type = APDT

Excel worksheet name = PostDatedTransactionRecord

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = APDT
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Due Date	14-21	3	duedate	DateTime (CCYYMMDD)	Post-dated transaction due date. For Excel file, use date/time format (for example, 6/20/2008 10:30:00 AM).
Amount	22-33	4	amount	Decimal (12)	Payment amount (always a positive amount).
Filler	34-114	5	Filler	String (81)	Filler for fixed file layout.

Post-Dated Transactions Import File Trailer Record

Fixed record type = ATRL

Excel is not used.

Column	Position	Column Name	Type/Size	Comment
1	1-4	Record Type	String (4)	Value = ATRL
2	5-34	Agency ID	String (30)	Your unique agency number or alpha code.
3	35-84	Agency Name	String (50)	Your agency name.
4	85-94	Records	Integer (10)	Number of records in this file, excluding the trailer record.

5	95-106	Payments	Decimal (12)	Total payments.
6	107 - 114	Created Date	DateTime (CCYYMMDD)	File creation date.

Recall Objections Import File Layout

Recall Objections Import File Layout

The recall objections import file contains objections to recalls that you received from the agencies and attorneys holding the accounts.

Recall Objections Import File Naming Convention

Delimited or Fixed: AIMYYYYMMDDHHMMSS_####.AOBJ

Excel: AIMYYYYMMDDHHMMSS_####.AOBJ.XLS

Where #### represents the agency code assigned to the agency that is receiving the business.

Recall Objections Import File Record

Fixed record type = AOBJ

Excel worksheet name = RecallObjectionRecord

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Values = AOBJ
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Account	14-43	3	account	String (30)	Account number that the creditor assigned to this account.
Objection Reason Code	44-46	4	objection_reason_code	String (3)	Code that identifies the reason for the objection.
Objection Date	47-54	5	objection_date	DateTime (CCYYMMDD)	Date the agency closed the account. For Excel file, use date/time

					format (for example, 6/20/2008 10:30:00 AM).
Filler	55-102	6	Filler	String (48)	Filler for fixed file layout.

Recall Objections Import File Trailer Record

Fixed record type = ATRL

Excel is not used.

Column	Position	Column Name	Type/Size	Comment
1	1-4	Record Type	String (4)	Value = ATRL
2	5-34	Agency ID	String (30)	Your unique agency number or alpha code.
3	35-84	Agency Name	String (50)	Your agency name.
4	85-94	Records	Integer (10)	Number of records in this file, excluding the trailer record.
5	95-102	Created Date	DateTime (CCYYMMDD)	File creation date.

Reconciliation Import File Layout

Reconciliation Import File Layout

The reconciliation import file contains inventory reconciliation information that you received from the agencies and attorneys holding the accounts. It includes all open and closed accounts that the client hasn't recalled (CRCL) or submitted in a closed file (ACLS). It also includes accounts sent in a bankruptcy file (ABKP) (if your organization doesn't work bankruptcy accounts) or deceased file (ADEC) (if your organization doesn't work deceased accounts).

Reconciliation Import File Naming Convention

Delimited or Fixed: AIMYYYYMMDDHHMMSS_####.AREC

Excel: AIMYYYYMMDDHHMMSS_####.AREC.XLS

Where #### represents the Agency code assigned to the agency that received the business.

Reconciliation Import File Record

Fixed record type = AREC

Excel worksheet name = ReconciliationRecord

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = AREC
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Account	14-43	3	account	String (30)	Account number that the creditor assigned to this account.
Original Balance	44-55	4	original_balance	Decimal (12)	Account balance at time of placement.
Received Date	56-63	5	received_date	DateTime (CCYYMMDD)	Account placement date. For Excel file, use date/time format (for example, 6/20/2008 10:30:00 AM).
Current Balance	64-75	6	current_balance	Decimal (12)	Current balance of the account.
Last Payment Date	76-83	7	last_payment_date	DateTime (CCYYMMDD	Date of last payment on the account. For Excel file, use date/time format (for example, 6/20/2008 10:30:00 AM).
Last Payment Amount	84-95	8	last_payment_amount	Decimal (12)	Amount of last payment.
Filler	96-126	9	Filler	String (31)	Filler for fixed file layout.

Reconciliation Import File Trailer Record

Fixed record type = ATRL

Excel is not used.

Column	Position	Column Name	Type/Size	Comment
1	1-4	Record Type	String (4)	Value = ATRL
2	5-34	Agency ID	String (30)	Your unique agency number or alpha code.
3	35-84	Agency Name	String (50)	Your agency name.
4	85-94	Records	Integer (10)	Number of records in this file, excluding the trailer record.
5	95-106	Total Original Balance	Decimal (12)	Total balance of accounts at time of placement.
6	107 - 118	Total Current Balance	Decimal (12)	Total current balance of accounts placed.
7	119-126	Created Date	Date (CCYYMMDD)	File creation date.

Requests and Responses Import File Layout

Requests and Responses Import File Layout

The request and response import file contains responses that you received from the agencies and attorneys holding the accounts, and the corresponding requests.

Requests and Responses Import File Naming Convention

Delimited or Fixed: AIMYYYYMMDDHHMMSS_####.ARAR

Excel: AIMYYYYMMDDHHMMSS_####.ARAR.XLS

Where #### represents the Agency code assigned to the agency that received the business.

Requests and Responses Import File Record

Fixed record type = ARAR

Excel worksheet name = RequestAndResponseRecord

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = ARAR
File Number	5-13	2	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Request Code	14-18	3	request_code	String (5)	Code that identifies the type of request.
Response Code	19-23	4	response_code	String (5)	Code that identifies the type of response.
Request ID	24-32	5	request_id	Integer (9)	Code that identifies the request.
Text	33-532	6	text	String (500)	If needed, extra space to describe the request. Otherwise, filler for fixed file layout.

Requests and Responses Import File Trailer Record

Fixed record type = ATRL

Excel is not used.

Column	Position	Column Name	Type/Size	Comment
1	1-4	Record Type	String (4)	Value = ATRL
2	5-34	Agency ID	String (30)	Your unique agency number or alpha code.
3	35-84	Agency Name	String (50)	Your agency name.
4	85-94	Records	Integer (10)	Number of records in this file, excluding the trailer record.
5	95-102	Created Date	DateTime (CCYYMMDD)	File creation date.

6	103-532	Filler	String (430)	Filler for fixed file layout.

Status and Notes Import File Layout

Status and Notes Import File Layout

The status and notes import file contains status notifications and notes that you received from the agencies and attorneys holding the accounts.

Status and Notes Import File Naming Convention

Delimited or Fixed: AIMYYYYMMDDHHMMSS_####.ASTS

Excel: AIMYYYYMMDDHHMMSS_####.ASTS.XLS

Where #### represents the Agency code assigned to the agency that received the business.

Status and Notes Import File Record

Delimited/fixed record type = ASTS

Excel worksheet name = StatusRecord

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = ASTS
Debtor ID	5-13	2	debtor_number	Integer (9)	Unique number assigned to each debtor record.
File Number	14-22	3	file_number	Integer (9)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Status	23-25	4	status	String (3)	Code that identifies the status of the account. This code must exist in the receiving organization's system.
Note	26-100	5	note	String (75)	Note text to include for the status change.
Note Date	101-108	6	note_date	DateTime (CCYYMMDD)	Note creation date. For Excel file, use date/time

					format (for example, 6/20/2008 10:30:00 AM).
Notification	109-111	7	notification	String (3)	Notification queue to send account for action. This queue level must exist in the receiving organization's system.

Status and Notes Import File Trailer Record

Fixed record type = ATRL

Excel is not used.

Column	Position	Column Name	Type/Size	Comment
1	1-4	Record Type	String (4)	Value = ATRL
2	5-34	Agency ID	String (30)	Your unique agency number or alpha code.
3	35-84	Agency Name	String (50)	Your agency name.
4	85-94	Records	Integer (10)	Number of records in this file, excluding the trailer record.
5	95-102	Created Date	DateTime (CCYYMMDD)	File creation date.
6	103 - 111	Filler	String (9)	Filler for fixed file layout.

Work Effort File Layout

Work Effort File Layout

The work effort import file contains letter and note work effort updates that you received from the agencies and attorneys holding the accounts.

Work Effort File Naming Convention

Delimited or Fixed: AIMYYYYMMDDHHMMSS_####.AWEF

Excel: AIMYYYYMMDDHHMMSS_####.AWEF.XLS

Where #### represents the Agency code assigned to the agency that received the business.

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Work Effort Import File Record

Delimited/fixed record type = AWEF

Excel worksheet name = WorkEffortRecord

Latitude	Position	Col	Column Name	Format	Comment
Record Type	1-4	1	record_type	String (4)	Value = AWEF
File Number	5-14	2	file_number	Integer (10)	Unique number assigned to each account placed. Use this value for all data sent to AIM.
Action Date	15-28	3	action_date	DateTime (CCYYMMDDhhmmss)	Work effort creation date and time. For Excel file, use date/time format (for example, 6/20/2008 10:30:00 AM).
Action Category	29-31	4	action_category	String (3)	Category that your outsourcing partner assigned to group the letter action.
Action Code	32-41	5	action_code	String (10)	Code that the outside collection agency or attorney assigned to identify the letter action.
Action Text	42-241	6	action_text	String (200)	Description that the outside collection agency or attorney associated to the letter action.

Work Effort Import File Trailer Record

Fixed record type = ATRL

Excel is not used.

Column	Position	Column Name	Type/Size	Comment
1	1-4	Record Type	String (4)	Value = ATRL
2	5-34	Agency ID	String (30)	Your unique agency number or alpha code.
3	35-84	Agency Name	String (50)	Your agency name.
4	85-94	Records	Integer (10)	Number of records in this file, excluding the trailer record.
5	95-102	Created Date	DateTime (CCYYMMDD)	File creation date.
6	103-241	Filler	String (139)	Filler for fixed file layout.

YGC Import File Layouts

YGC Import File Layouts

YGC import files contain information from attorneys that use the You've Got Claims (YGC) file format. To view import errors, view the history in Exchange for the legal client. For more information, see the Exchange documentation.

YGC Import Record Types

The following records types are available for import into AIM. Include the records as separate lines within each YGC import file. The first two characters of each line indicate the record type.

Record Type	Description
30	Financial Transaction
31	Primary Debtor Information
33	Alternate Debtor Information
34	Employment Information
35	Bank and Asset Information

36	Miscellaneous Information
37	Caption and Legal Names
38	Reconciliation Record
39	Messages
41	Suit and Judgment Information
42	Balance and Interest Updates
43	Payment Plan Information
44	Bankruptcy Information
45	Probate (Deceased) Information
46	Physical Assets (property and vehicle)

YGC Import Record Type 30 - Financial Transaction

This record reports payment, cost, and insufficient funds (NSF) transactions. For NSF transactions, values are negative. Importing this record creates a transaction and adds it to a batch for each record. To apply the transaction to the account balance, process the batch in Latitude. If the attorney generates this record as a response to a record type 12 (direct payment), don't process the batch in Latitude.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 30.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Internal file number of the receiver (agency or law firm) working the account.	Char	15	33	47
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	48	57
FORW_ID	You've Got Claims ID in Latitude.	Char	10	58	67

RET_CODE	Return code that identifies the transaction. Valid values are: 1 = Standard Payment 3 = Settlement Payment (full or partial) 6 = Direct Payment 33-81 = Cost Disbursement (user-defined)	Numeric	2	68	69
PAY_DATE	Date the funds from the debtor cleared the receiver's bank.	Date	8	70	77
GROSS_PAY	Typically, the payment amount reported to the sender, which may not include statutory attorney fees awarded in some states.	Numeric	14.2	78	91
NET_CLIENT	Payment amount applied to the principal that AIM calculates fees against.	Numeric	14.2	92	105
CHECK_AMT	Actual amount going to the sender, typically the gross payment without the fees.	Numeric	14.2	106	119
COST_RET	Cost reimbursement to the sender. The scenario is that the receiver spent their own money on costs and the sender reimbursed them.	Numeric	14.2	120	133
FEES	Total of commissions and suit fees earned on this payment. You can split this amount among LINE2_7 (suit fees) and LINE2_8 (commissions).	Numeric	14.2	134	147
AGENT_FEES	If you forwarded the account to another attorney, the fees that co-counsel deducted.	Numeric	14.2	148	161
FORW_CUT	If the receiver remits to both sender and original creditor, the amount paid to the sender.	Numeric	14.2	162	175
COST_REC	Cost money that the receiver is recovering on this payment. If the receiver agreed not to give the sender invoices on costs, the receiver doesn't return the money to the sender.	Numeric	14.2	176	189
BPJ	Legal status of the account. Valid values are: B = Before Suit P = Post Suit	Char	1	190	190

	J = Post Judgment				
TA_NO	Unique identifier for this transaction.	Numeric	6	191	196
RMIT_NO	Unique identifier for the batch this transaction is in.	Numeric	6	197	202
LINE1_3	Statutory attorney fees recovered in this payment. Typically, these fees are state awarded and don't get remitted.	Numeric	14.2	203	216
LINE1_5	Remaining principal balance.	Numeric	14.2	217	230
LINE1_6	Typically, the same as GROSS_PAY.	Numeric	14.2	231	244
LINE2_1	Amount applied to the principal for this payment only, not the total of all principal payments.	Numeric	14.2	245	258
LINE2_2	Amount applied to interest for this payment only, not the total of all interest payments.	Numeric	14.2	259	272
LINE2_5	Not applicable for payments. Reports a cost disbursement, in which case it is the only dollar-value field populated besides LINE1_5. This record then serves as an invoice to the sender.	Numeric	14.2	273	286
LINE2_6	This field is for the rare situation in which the receiver receives payments for costs up front.	Numeric	14.2	287	300
LINE2_7	Suit fees earned on this payment. This MUST NOT EXCEED GROSS_PAY.	Numeric	14.2	301	314
LINE2_8	Commissions earned on this payment. This MUST NOT EXCEED GROSS_PAY.	Numeric	14.2	315	328
DESCR	There is no restriction here. Typical descriptions are payment, suit filed, audit, collection, or court costs.	Char	30	329	358
POST_DATE	Date the transaction posted into the service provider's system.	Date	8	359	366
REMIT_DATE	Date the receiver sent monies to the sender.	Date	8	367	374
TA_CODE	Type of payment or cost. Use an accounting or disbursement YGC status code.	Char	8	375	382

COMMENT	Description of this transaction. For payments, it can include the check number.	Char	25	383	407

YGC Import Record Type 31 - Primary Debtor

This record reports primary debtor information updates.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 31.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Internal file number of the receiver (agency or law firm) working the account.	Char	15	33	47
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	48	57
FORW_ID	You've Got Claims ID in Latitude.	Char	10	58	67
D1_NAME	Primary debtor's name. The format is Lastname/Firstname.	Char	30	68	97
D1_SALUT	Code for the salutation. Valid values are: 1 - Mr. 2 - Mrs. 3 - Ms. 4 - Mr. & Mrs. 5 - Dr. 6 - Capt. 7-9 - Gentlemen	Numeric	1	98	98
D1_ALIAS	Primary debtor's alias name. The format is Lastname/Firstname.	Char	25	99	123
D1_STREET	Primary debtor's street address.	Char	25	124	148
D1_CS	Primary debtor's city and state, formatted as City ST or City,ST. For example, Linden NJ or Linden,NJ. To display the city and state in the	Char	23	149	171

	account detail page in DataLink, populate this field.				
D1_ZIP	Primary debtor's postal code. It can accommodate the four-digit extension without the hyphen.	Char	9	172	180
D1_PHONE	Primary debtor's phone number. It can accommodate separators for the area code and exchange.	Char	12	181	192
D1_FAX	Primary debtor's fax number. It can accommodate separators for the area code and exchange.	Char	12	193	204
D1_SSN	Primary debtor's social security number. It can accommodate hyphens.	Char	15	205	219
RFILE	Code common to a set of accounts for the same debtor to allow you to work a parent account instead of each individual account.	Char	8	220	227
D1_DOB	Primary debtor's date of birth.	Date	8	228	235
D1_DL	Primary debtor's driver's license number.	Char	17	236	252
D1_STATE	Primary debtor's state abbreviation, which should match the one in D1_CS. If this field contains a value, populate the D1_CITY and D1_CS fields to display the city and state in the account detail page in DataLink.	Char	3	253	255
D1_MAIL	Indicates whether the delivery service returned the suit papers. Valid values are: Y = Yes N = No	Char	1	256	256
SERVICE_D	Date the court served papers to the debtor.	Date	8	257	264
ANSWER_DUE_D	Date the debtor's response to the suit is due, typically 30 days after SERVICE_D	Date	8	265	272
ANSWER_FILE_D	Date the debtor filed a response.	Date	8	273	280

DEFAULT_D	Date the creditor requests a default judgment for a debtor who doesn't appear in court by ANSWER_DUE_D.	Date	8	281	288
TRIAL_D	Court-assigned date for the debtor to stand trial. For a small-claims court, the value is the same as ANSWER_DUE_D.	Date	8	289	296
HEARING_D	Date of the latest hearing on a motion that either party filed.	Date	8	297	304
LIEN_D	Date the creditor filed a lien against the debtor's property.	Date	8	305	312
GARN_D	Date the creditor established garnishment against the debtor's wages.	Date	8	313	320
SERVICE_TYPE	Method used to serve the suit papers. Valid values are: PER = Personal CER = Certified Mail SUB = Sub-service POS = Posting (left at front door) FIR = First Class Mail	Char	4	321	324
D1_STRT2	Overflow field for D1_STREET.	Char	25	325	349
D1_CITY	Primary debtor's city. If this field contains a value, populate the D1_CS and D1_STATE fields to display the city and state in the account detail page in DataLink.	Char	30	350	379
D1_CELL	Primary debtor's cell phone number. It can accommodate separators for the area code and exchange.	Char	12	380	391
SCORE_FICO	Fair Isaac credit score.	Numeric	3	392	394
SCORE_COLLECT	Creditor-calculated score.	Numeric	3	395	397
SCORE_OTHER	Creditor-calculated score.	Numeric	3	398	400
D1_CNTRY	Standard code for the debtor's country.	Char	3	401	403

D1_STREET_LONG	Full primary debtor street address. It's used for systems that can hold longer values. It should be the same value as D1_STREET + D1_STRT2. Use this field with D1_STREET in case your receivers cannot accept this field.	Char	50	404	453
D1_STREET2_LONG	Overflow field for D1_STREET_LONG.	Char	50	454	503

YGC Import Record Type 33 - Alternate Debtor

This record reports alternate debtor information updates. AIM only supports the primary debtor and the first two co-debtors for this information.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 33.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Internal file number of the receiver (agency or law firm) working the account.	Char	15	33	47
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	48	57
FORW_ID	You've Got Claims ID in Latitude.	Char	10	58	67
D2_NAME	Name of the second debtor or co-signer. The format is Lastname/Firstname.	Char	25	68	92
D2_STREET	Second debtor's street address.	Char	25	93	117
D2_CSZ	Second debtor's city, state, and postal code, formatted as City ST Zip or City,ST Zip. For example, Linden NJ 07036 or Linden,NJ 07036.	Char	25	118	142
D2_PHONE	second debtor's phone number. It can accommodate separators for the area code and exchange.	Char	15	143	157
D2_SSN	Second debtor's social security number. It can accommodate hyphens.	Char	15	158	172

D3_NAME	Name of the third debtor or co-signer. The format is Lastname/Firstname.	Char	25	173	197
D3_STREET	Third debtor's street address.	Char	25	198	222
D3_CSZ	Third debtor's city, state, and postal code, formatted as City ST Zip or City,ST Zip. For example, Linden NJ 07036 or Linden,NJ 07036.	Char	25	223	247
D3_PHONE	Third debtor's phone number. It can accommodate separators for the area code and exchange.	Char	15	248	262
D3_SSN	Third debtor's social security number. It can accommodate hyphens.	Char	15	263	277
D2_DOB	Second debtor's date of birth.	Date	8	278	285
D3_DOB	Third debtor's date of birth.	Date	8	286	293
D2_DL	Second debtor's driver's license number.	Char	17	294	310
D3_DL	Third debtor's driver's license number.	Char	17	311	327
D2_CNTRY	Standard code for the second debtor's country.	Char	3	328	330
D3_CNTRY	Standard code for the third debtor's country.	Char	3	331	333
D2_STREET_LONG	Full street address for the second debtor for systems that can hold longer values. Use this field with D2_STREET in case your receivers cannot accept this field.	Char	50	334	383
D2_STREET2_LONG	Overflow field for D2_STREET_LONG.	Char	50	384	433
D3_STREET_LONG	Full street address for the third debtor for systems that can hold longer values. Use this field with D3_STREET in case your receivers cannot accept this field.	Char	50	434	483
D3_STREET2_LONG	Overflow field for D3_STREET_LONG.	Char	50	484	533

YGC Import Record Type 34 - Employment

This record reports updates to a debtor's employment information. AIM only supports the primary debtor and the first two co-debtors for this information.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 34.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Internal file number of the receiver (agency or law firm) working the account.	Char	15	33	47
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	48	57
FORW_ID	You've Got Claims ID in Latitude.	Char	10	58	67
EMP_NAME	Company name of the debtor's employer.	Char	40	68	107
EMP_STREET	Employer's street address.	Char	40	108	147
EMP_PO	Employer's P.O. box number.	Char	40	148	187
EMP_CS	Employer's city and state, formatted as City ST or City,ST. For example, Linden NJ or Linden,NJ.	Char	30	188	217
EMP_ZO	Employer's postal code. It can accommodate the four-digit extension with the hyphen.	Char	10	218	227
EMP_PHONE	Employer's phone number. It can accommodate separators for the area code and exchange.	Char	15	228	242
EMP_FAX	Employer's fax number. It can accommodate separators for the area code and exchange.	Char	15	243	257
EMP_ATTN	Department or personnel for correspondence to employer.	Char	40	258	297
EMP_PAYR	Contact person at the payroll department.	Char	40	298	337
EMP_NO *this field is required	Number the debtor's employer assigned to identify the debtor. It can contain up to three employment records. Valid values are:1, 2, or 3. For example, record 34 for the primary debtor can have EMP_NO = 1 and the record 34 for the co-signer can have EMP_NO = 2. If the agency sends a record 34 with the same	Numeric	3	338	340

	EMP_NO as a previous record 34 for the same account, the second record overwrites the first.				
EMPLOYEE_NAME	Debtor name. There is no format restriction.	Char	30	341	370
EMP_INCOME	Debtor's gross annual income from this employer.	Numeric	14.2	371	384
EMP_FREQ	Debtor's pay rate basis. Valid values are: H = Hourly A = Annual W = Weekly M = Monthly B = Bi-monthly S = Semi-monthly	Char	1	385	385
EMP_POS	Debtor's title at the place of employment.	Char	20	386	405
EMP_TENURE	Debtor's length of service in months.	Numeric	3	406	408
EMP_CNTRY	Standard code for the debtor's country.	Char	3	409	411

YGC Import Record Type 35 - Bank Assets

This record reports non-physical assets (for example, bonds, stocks).

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 35.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Internal file number of the receiver (agency or law firm) working the account.	Char	15	33	47
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	48	57
FORW_ID	You've Got Claims ID in Latitude.	Char	10	58	67

FILLER	Currently a free field	Char	20	68	87
BANK_NAME	Name of the debtor's bank.	Char	30	88	117
BANK_STREET	Bank's street address.	Char	30	118	147
BANK_CSZ	Bank's city, state, and postal code, formatted as City ST Zip or City,ST Zip. For example, Linden NJ 07036 or Linden,NJ 07036.	Char	30	148	177
BANK_ATTN	Contact name for the bank.	Char	30	178	207
BANK_PHONE	Bank's phone number. It can accommodate separators for the area code and exchange.	Char	15	208	222
BANK_FAX	Bank's fax number. It can accommodate separators for the area code and exchange.	Char	15	223	237
BANK_ACCT	Debtor's bank account number.	Char	34	238	271
MISC_ASSET1	Non-land or non-automobile asset like a stock portfolio. A receiver can send a Record 46 to supply physical asset information. If this field contains a value, set BANK_NO to 1.	Char	25	272	296
MISC_ASSET2	Non-land or non-automobile asset like a stock portfolio. A receiver can send a Record 46 to supply physical asset information. If this field contains a value, set BANK_NO to 1.	Char	25	297	321
MISC_ASSET3	Non-land or non-automobile asset like a stock portfolio. A receiver can send a Record 46 to supply physical asset information. If this field contains a value, set BANK_NO to 1.	Char	25	322	346
MISC_PHONE	Phone number relating to the miscellaneous asset. If this field contains a value, set BANK_NO to 1.	Char	15	347	361
BANK_NO	Debtor's bank number. It can contain up to three bank records. Valid values are: 1, 2, or 3. For example, Record 05 for the debtor's checking account can have BANK_NO = 1 and Record 05 for the debtor's savings account can have BANK_NO = 2. If the attorney sends a record 05 with the same BANK_NO as a previous record 05 for the same account, the second record overwrites the first. If	Numeric	3	362	364

	this record contains a miscellaneous asset, this value must be 1.				
BANK_CNTRY	Standard code for the bank's country.	Char	3	365	367

YGC Import Record Type 36 - Miscellaneous Extra Data

This record reports updates to the debtor's attorney information and any miscellaneous information that no other record accommodates. You can submit a record for each of the first three debtors on the account (the primary and the first two co-debtors). AIM only supports the primary debtor and the first two co-debtors for this information.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 36.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Internal file number of the receiver (agency or law firm) working the account.	Char	15	33	47
FORW_ID	You've Got Claims ID in Latitude.	Char	10	48	57
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	58	67
ADVA_NAME	Name of the debtor's attorney. There is no format restriction.	Char	30	68	97
ADVA_FIRM	Name of the debtor's attorney's firm.	Char	30	98	127
ADVA_FIRM2	Overflow field for ADVA_FIRM.	Char	30	128	157
ADVA_STREET	Attorney's street address.	Char	30	158	187
ADVA_CSZ	Attorney's city, state, and postal code, formatted as City ST Zip or City,ST Zip. For example, Linden NJ 07036 or Linden,NJ 07036.	Char	30	188	217
ADVA_SALUT	Attorney's preferred salutation in correspondence, such as "Dear Attorney Lewis:"	Char	30	218	247

ADVA_PHONE	Attorney's phone number. It can accommodate separators for the area code and exchange.	Char	30	248	277
ADVA_FAX	Attorney's fax number. It can accommodate separators for the area code and exchange.	Char	15	278	292
ADVA_FILENO	File number the debtor's attorney's firm assigned to this account.	Char	12	293	304
MISC_DATE1	Miscellaneous date regarding the account. If this field contains a value, set ADVA_NUM to 1.	Date	8	305	312
MISC_DATE2	Miscellaneous date regarding the account. If this field contains a value, set ADVA_NUM to 1.	Date	8	313	320
MISC_AMT1	Miscellaneous dollar amount regarding the account. If this field contains a value, set ADVA_NUM to 1.	Numeric	14.2	321	334
MISC_AMT2	Miscellaneous dollar amount regarding the account. If this field contains a value, set ADVA_NUM to 1.	Numeric	14.2	335	348
MISC_COMM1	Miscellaneous comment regarding the account. If this field contains a value, set ADVA_NUM to 1.	Char	15	349	363
MISC_COMM2	Miscellaneous comment regarding the account. If this field contains a value, set ADVA_NUM to 1.	Char	15	364	378
MISC_COMM3	Miscellaneous comment regarding the account. If this field contains a value, set ADVA_NUM to 1.	Char	15	379	393
MISC_COMM4	Miscellaneous comment regarding the account. If this field contains a value, set ADVA_NUM to 1.	Char	15	394	408
ADVA_NUM	Debtor or co-debtor attorney record number. It can contain up to three attorney records. Valid values are:	Char	3	409	411

	1 = Primary debtor				
	2 = First co-debtor				
	3 = Second co-debtor				
ADVA_CNTRY	Standard code for the debtor's attorney's country.	Char	3	412	414

YGC Import Record Type 37 - Legal

This record reports updates to the caption for the parties named in the suit. Typically, the Plaintiffs are the original creditors and the Defendants are the debtors.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 37.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Internal file number of the receiver (agency or law firm) working the account.	Char	15	33	47
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	48	57
FORW_ID	You've Got Claims ID in Latitude.	Char	10	58	67
PLAINTIFF_1	First plaintiff, typically the debt owner or original creditor. There is no format restriction.	Char	30	68	97
PLAINTIFF_2	Second plaintiff. There is no format restriction.	Char	30	98	127
PLAINTIFF_3	Third plaintiff. There is no format restriction.	Char	30	128	157
PLAINTIFF_4	Fourth plaintiff. There is no format restriction.	Char	30	158	187
PLAINTIFF_5	Fifth plaintiff. There is no format restriction.	Char	30	188	217
PLAINTIFF_6	Sixth plaintiff. There is no format restriction.	Char	30	218	247
PLAINTIFF_7	Seventh plaintiff. There is no format restriction.	Char	30	248	277
DEFENDANT_1	Full name of the first defendant, typically the debtor. There is no format restriction.	Char	30	278	307

DEFENDANT_2	Name of the second defendant. It can also be an alias of the primary defendant. There is no format restriction.	Char	30	308	337
DEFENDANT_3	Name of the third defendant. There is no format restriction.	Char	30	338	367
DEFENDANT_4	Name of the fourth defendant. There is no format restriction.	Char	30	368	397
DEFENDANT_5	Name of the fifth defendant. There is no format restriction.	Char	30	398	427
DEFENDANT_6	Name of the sixth defendant. There is no format restriction.	Char	30	428	457
DEFENDANT_7	Name of the seventh defendant. There is no format restriction.	Char	30	458	487
DEFENDANT_8	Name of the eighth defendant. There is no format restriction.	Char	30	488	517
DEFENDANT_9	Name of the ninth defendant. There is no format restriction.	Char	30	518	547

YGC Import Record Type 38 - Reconciliation

This record reports that an attorney's account is from the sender's collection system.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 38.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Internal file number of the receiver (agency or law firm) working the account.	Char	15	33	47
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	48	57
FORW_ID	You've Got Claims ID in Latitude.	Char	10	58	67
DPLACED	Account placement date.	Date	8	68	75

DEBT_NAME	Primary debtor's name. The format is Lastname/Firstname.	Char	30	76	105
CRED_NAME	Name of the creditor company. You can use CRED_NAME2 for overflow.	Char	30	106	135
D1_BAL	Dollar amount of the principal due.	Numeric	14.2	136	149
IDATE	Ddate the system last calculated interest on the debt.	Date	8	150	157
IAMT	Dollar amount of total interest accrued.	Numeric	14.2	158	171
IDUE	Dollar amount of interest due as of IDATE, which may not equal IAMT.	Numeric	14.2	172	185
PAID	Total dollar amount already paid toward the debt.	Numeric	14.2	186	199
COST_BAL	Current administrative costs incurred for the account.	Numeric	14.2	200	213
DEBT_CS	Debtor's city and state, formatted as City ST or City,ST. For example, Linden NJ or Linden,NJ.	Char	23	214	236
DEBT_ZIP	Debtor's postal code. It can accommodate the four-digit extension without the hyphen.	Char	9	237	245
CRED_NAME2	Overflow field for CRED_NAME.	Char	25	246	270
COMM	Commission percentage the sender determined that the receiver earns. This field doesn't have a set numeric format.	Char	4	271	274
SFEE	Percentage the receiver earns for the suit. This field doesn't have a set numeric format.	Char	4	275	278
RFILE	Code common to a set of accounts for the same debtor to allow you to work a parent account instead of each individual account.	Char	8	279	286
DEBT_CNTRY	Standard code for the debtor's country.	Char	3	287	289

YGC Import Record Type 39 - Notes

This record reports status updates. Use the PCODE field to identify the update type. AIM adds notes to Latitude using the date indicated in the file (PDATE).

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 39.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Internal file number of the receiver (agency or law firm) working the account.	Char	15	33	47
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	48	57
FORW_ID	You've Got Claims ID in Latitude.	Char	10	58	67
PDATE	Message date.	Date	8	68	75
PCODE	Type of status update. Some codes trigger changes to the account in the DataLink.	Char	8	76	83
PCMT	Comment or description. Include a CLRF after the last character so you don't have to right-pad with spaces to fill 1024 characters.	Char	1024	84	1107

YGC Import Record Type 41 - Judgments

This record reports a suit filed against a debtor, including the post-judgment interest rate. If the JUDG_PRIN field has a value, the court awarded a judgment.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 41.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Internal file number of the receiver (agency or law firm) working the account.	Char	15	33	47

FIRM_ID	Contains the YGC ID for the attorney record in AIM (aim_agency.alphacode)	Char	10	48	57
FORW_ID	You've Got Claims ID in Latitude.	Char	10	58	67
SUIT_AMT	Dollar amount requested in the suit.	Numeric	14.2	68	81
SUIT_DATE	Date the creditor filed suit against the debtor.	Date	8	82	89
CNTRCT_FEE	Contract fee. It's dictated in the credit contract up front and added to the principal from which the receiving attorney can take a commission.	Numeric	14.2	90	103
STAT_FEE	Statutory fee awarded to the attorney only, as determined by the debtor state.	Numeric	14.2	104	117
DOCKET_NO	Initial number assigned to the suit.	Char	15	118	132
JDGMNT_NO	Judgment number. Depending on the state the creditor filed the suit in, the court may assign a new number upon judgment.	Char	15	133	147
JDGMNT_DATE	Date the clerk recorded the judgment.	Date	8	148	155
JDGMNT_AMT	Dollar amount awarded in the judgment.	Numeric	14.2	156	169
PREJ_INT	Dollar amount of the interest due before the court rendered judgment.	Numeric	14.2	170	183
JDG_COSTS	Sum of the costs to the sender to carry the suit forward, such as attorney fees.	Numeric	14.2	184	197
RATES_PRE	Interest rate defined in the contract between the creditor and debtor, in decimal form. For example, if the interest rate is 19.5 percent, the value is ".1950."	Numeric	5.4	198	202
RATES_POST	Upon judgment, the interest rate applied as dictated by the debtor state, in decimal form. For example, if the interest rate is 19.5 percent, the value is ".1950."	Numeric	5.4	203	207
STAT_FLAG	Indicates whether the law firm keeps the statutory fee. Valid values are: Y = Yes	Y/N	1	208	208

	N = No				
INT_FLAG	Indicates whether the court added pre-judgment interest (PREJ_INT) to the principal when the court rendered judgment. Valid values are: Y = Yes N = No	Y/N	1	209	209
JUDG_PRIN	Principal amount of the judgment.	Numeric	14.2	210	223
ADJUSTMENT	Difference between what the creditor requested in the suit and the judgment amount.	Numeric	14.2	224	237
JDGMNT_BAL	Sum of PREJ_INT + JDG_COSTS + JUDG_PRIN + CNTRCT_FEE + STAT_FEE.	Numeric	14.2	238	251
LEGAL_COUNTY	County where the creditor filed suit against the debtor.	Char	20	252	271
LEGAL_STATE	Abbreviation of the state where the creditor filed suit.	Char	4	272	275
CRT_DESIG	Full name of the court (for example, Gwinnett County State Court, THE NINTH JUDICIAL CIRCUIT).	Char	30	276	305
CRT_TYPE	Brief description of the court (for example, Superior, Supreme, Circuit).	Char	15	306	320
JDGMNT_EXP_DATE	Date the suit judgment expires. It is usually 7 - 12 years from the filing date.	Date	8	321	328
LEGAL_CNTRY	Standard code for the country where the creditor filed suit.	Char	3	329	331

YGC Import Record Type 42 - Balances and Interest

This record reports updates to account balances and interest.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 42.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12

FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Internal file number of the receiver (agency or law firm) working the account.	Char	15	33	47
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	48	57
FORW_ID	You've Got Claims ID in Latitude.	Char	10	58	67
RATES_PRE	Interest rate defined in the contract between the creditor and debtor, in decimal form. For example, if the interest rate is 19.5 percent, the value is ".1950."	Numeric	5.4	68	72
RATES_POST	Upon judgment, the interest rate applied as dictated by the debtor state, in decimal form. For example, if the interest rate is 19.5 percent, the value is ".1950."	Numeric	5.4	73	77
PER_DIEM	Interest dollar amount accrued each day.	Numeric	14.8	78	91
INT_BASE	Dollar amount upon which interest accrues. Typically, it's just the principal, but can include other amounts such as attorney fees and costs.	Numeric	14.2	92	105
IAMOUNT	Total interest accrued to date.	Numeric	14.2	106	119
IPAID	From the complete payment described in Record 30 that provoked this record, the part going toward interest.	Numeric	14.2	120	133
IDATE	Date the system last calculated interest on the debt.	Date	8	134	141
PRIN_AMT	Total principal owed on the debt.	Numeric	14.2	142	155
PRIN_PAID	From the complete payment described in Record 30 that provoked this record, the part going toward the principal.	Numeric	14.2	156	169
CNTRCT_AMT	Contract fee. It's dictated in the credit contract up front and added to the principal from which the receiving attorney can take a commission.	Numeric	14.2	170	183
CNTRCT_PAID	Amount paid toward the contract fee (CNTRCT_AMT).	Numeric	14.2	184	197
STAT_AMT	Statutory fee awarded to the attorney only, as determined by the debtor state.	Numeric	14.2	198	211
STAT_PAID	Amount paid toward the statutory fee (STAT_AMT).	Numeric	14.2	212	225

COST_AMT	Dollar amount of the legal costs billed.	Numeric	14.2	226	239
COST_PAID	Dollar amount of the legal costs paid.	Numeric	14.2	240	253
DBAL	Debtor principal and costs due (PRIN_AMT + COST_AMT). Don't include the interest here.	Numeric	14.2	254	267
IBAL	Dollar amount of the debtor interest due.	Numeric	14.2	268	281
STAT_FLAG	Indicates whether the law firm keeps the statutory fee. Valid values are: Y = Yes N = No	Char	1	282	282

YGC Import Record Type 43 - Payments

This record reports updates to payments and adjustments.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 43.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Internal file number of the receiver (agency or law firm) working the account.	Char	15	33	47
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	48	57
FORW_ID	You've Got Claims ID in Latitude.	Char	10	58	67
PLAN_DATE	Date the plan was agreed upon.	Date	8	68	75
PLAN_BAL	Amount the debtor agreed to pay in the plan.	Numeric	14.2	76	89
FIRST_DATE	Date of the first planned payment.	Date	8	90	97
FIRST_AMT	Dollar amount of the first payment.	Numeric	14.2	98	111
PAY_AMT	Dollar amount of the periodic payments.	Numeric	14.2	112	125
LAST_DATE	Date of the last planned payment.	Date	8	126	133

LAST_AMT	Dollar amount of the last planned payment.	Numeric	14.2	134	147
NO_PMTS	Total number of payments, including the first and last.	Numeric	5	148	152
FREQUENCY	Payment frequency. Valid values are: W = Weekly B = Biweekly M = Monthly	Char	1	153	153

YGC Import Record Type 44 - Bankruptcy

This record reports updates to bankruptcy information.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 44.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Internal file number of the receiver (agency or law firm) working the account.	Char	15	33	47
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	48	57
FORW_ID	You've Got Claims ID.	Char	10	58	67
DEBTOR_NUM	Identifies which debtor on the account is filing for bankruptcy. Valid values are: 1 = Primary debtor 2 = Second debtor 3 = Third debtor The last record (02 or 31) determines the primary debtor. The last record (03 or 33) determines the second and third debtors.	Numeric	3	68	70

CHAPTER	Chapter within the bankruptcy code, typically 7 or 13 for individuals.	Char	3	71	73
BK_FILENO	Court-issued case number for the bankruptcy.	Char	15	74	88
LOC	Location where the debtor filed bankruptcy. You can use this field for the court jurisdiction. There is no format restriction.	Char	40	89	128
FILED_DATE	Date the debtor filed bankruptcy.	Date	8	129	136
DSMIS_DATE	Date the court dismissed the bankruptcy.	Date	8	137	144
DSCHG_DATE	Date the court issued a discharge for the debtor. The discharge relieves the debtor of personal liability aside from collateral.	Date	8	145	152
CLOSE_DATE	Date the court adjudicated the case.	Date	8	153	160
CNVRT_DATE	Date the court converted the bankruptcy from one Chapter to another, typically from 13 to 7.	Date	8	161	168
MTG341_DATE	Date the initial meeting took place between creditors and debtors, typically 30 days after the filed date.	Date	8	169	176
MTG341_TIME	Time of day the initial meeting took place between creditors and debtors.	Char	8	177	184
MTG341_LOC	Location where the initial meeting took place between creditors and debtors.	Char	40	185	224
JUDGE_INIT	Bankruptcy judge's initials.	Char	3	225	227
REAF_AMT	Amount the debtor agrees to pay in full; the reaffirmation survives the bankruptcy.	Numeric	14.2	225	241
REAF_DATE	Date the debtor signed the reaffirmation.	Date	8	242	249

PAY_AMT	Periodic payment in a Chapter 11 or 13 bankruptcy, or a lump sum payment of a Chapter 7 bankruptcy.	Numeric	14.2	250	263
PAY_DATE	Date the payment arrangement was agreed upon.	Date	8	264	271
CONF_DATE	Date the judge approved the payment plan.	Date	8	272	279
CURE_DATE	Date the debtor paid all arrearages, fees, and interest.	Date	8	280	287

YGC Import Record Type 45 - Deceased

This record reports updates to deceased debtor information. AIM only supports the primary debtor and the first two co-debtors for this information.

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 45.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Internal file number of the receiver (agency or law firm) working the account.	Char	15	33	47
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	48	57
FORW_ID	You've Got Claims ID.	Char	10	58	67
DEBTOR_NO	Identifies which debtor on the account is filing for bankruptcy. Valid values are: 1 = Primary debtor 2 = Second debtor 3 = Third debtor The last record (02 or 31) determines the primary debtor. The last record (03 or 33) determines the second and third debtors. AIM requires this field.	Numeric	3	68	70
DOD	Date the debtor died.	Date	8	71	78

PRB_CASE_NO	Court-issued case number.	Char	15	79	93
PRB_ST	State abbreviation of the debtor's residence.	Char	2	94	95
PRB_CTY	County name of the debtor's residence.	Char	20	96	115
PRB_CRT	Name of the court where the beneficiaries filed probate. There is no format restriction.	Char	30	116	145
PRB_DATE	Date the beneficiaries filed probate.	Date	8	146	153
PRB_EXP	Last date on which creditors can file claims against the estate.	Date	8	154	161
REP_NAME	Cull name of the person handling the estate.	Char	40	162	201
REP_STRT1	Personal representative's street address line 1.	Char	40	202	241
REP_STRT2	Overflow field for REP_STRT1.	Char	40	242	281
REP_CITY	Personal representative's city.	Char	30	282	311
REP_ST	Personal representative's state.	Char	2	312	313
REP_ZIP	Personal representative's postal code, which can include the four-digit extension.	Char	10	314	323
REP_PHONE	Personal representative's phone number.	Char	20	324	343
ATTY_NAME	Estate attorney's full name.	Char	40	344	383
ATTY_FIRM	Estate attorney's law firm.	Char	40	384	423
ATTY_STRT1	Estate attorney's street address line 1.	Char	40	424	463
ATTY_STRT2	Overflow field for ATTY_STRT1.	Char	40	464	503
ATTY_CITY	Estate attorney's city.	Char	30	504	533
ATTY_ST	Estate attorney's state.	Char	2	534	535
ATTY_ZIP	Estate attorney's postal code, which can include the four-digit extension.	Char	10	536	545
ATTY_PHONE	Estate attorney's phone number.	Char	20	546	565

Field Code	Field Description	Field Type	Field Size	Start	End
REP_CNTRY	Personal representative's country.	Char	3	566	568
ATTY_CNTRY	Estate attorney's country.	Char	3	569	571

YGC Import Record Type 46 - Physical Assets

This record reports updates to physical assets (for example, real estate or automobile).

Field Code	Field Description	Field Type	Field Size	Start	End
RECORD_CODE	Value = 46.	Char	2	1	2
FILENO	Latitude file number.	Char	10	3	12
FORW_FILE	Customer account number in Latitude.	Char	20	13	32
MASCO_FILE	Internal file number of the receiver (agency or law firm) working the account.	Char	15	33	47
FIRM_ID	YGC ID for the attorney record in AIM.	Char	10	48	57
FORW_ID	You've Got Claims ID in Latitude.	Char	10	58	67
DBTR_NUM	Debtor on the account who owns the asset. Valid values are: 1 = Primary debtor 2 = Second debtor 3 = Third debtor	Numeric	3	68	70
ASSET_ID	Code that identifies the asset the debtor owns.	Char	3	71	73
ASSET_OWNER	Full name of the debtor who owns the asset.	Char	60	74	133
STREET	Asset's street address.	Char	40	134	173
STREET_2	Overflow field for STREET.	Char	40	174	213
STREET_3	Overflow field for STREET_2.	Char	40	214	253
CITY	Asset's city.	Char	30	254	283
TOWN	Asset's town or borough. Use this field as an alternative or supplement to CITY.	Char	30	284	313

CNTY	Asset's county.	Char	30	314	343
STATE	Asset's state abbreviation.	Char	2	344	345
ZIP	Asset's postal code.	Char	20	346	365
CNTRY	Asset's country abbreviation.	Char	3	366	368
PHONE	Asset's phone number. This field can accommodate separators for the area code and exchange.	Char	20	369	388
BLOCK	For a land asset, the block number.	Char	10	389	398
LOT	For a land asset, the lot number.	Char	10	399	408
ASSET_VALUE	Dollar value of the asset.	Numeric	9.2	409	417
ASSET_DESC	Description of the asset.	Char	40	418	457
ASSET_VIN	For an automobile asset, the vehicle ID number.	Char	20	458	477
ASSET_LIC_PLATE	For an automobile asset, the license plate number.	Char	10	478	487
ASSET_COLOR	For an automobile asset, the color of the vehicle.	Char	15	488	502
ASSET_YEAR	For an automobile asset, the manufacture year.	Char	4	503	506
ASSET_MAKE	For an automobile asset, the maker of the vehicle.	Char	20	507	526
ASSET_MODEL	For an automobile asset, the vehicle model.	Char	20	527	546
REPO_FILE_NUM	For an automobile asset, the repossession file number that the creditor assigned.	Char	15	547	561
REPO_D	For an automobile asset, the date the repossession occurred.	Date	8	562	569
REPO_AMT	For an automobile asset, the value of the vehicle. This value is the same as ASSET_VALUE.	Numeric	9.2	570	578
CERT_TITLE_NAME	For an automobile asset, the name of the new owner as stated on the title.	Char	40	579	618
CERT_TITLE_D	For an automobile asset, the certification title transfer date.	Date	8	619	626

MORT_FRCL_D	For a real estate asset, the foreclosure date.	Date	8	627	634
MORT_FRCL_FILENO	Court-issued case number for the foreclosure.	Char	15	635	649
MORT_FRCL_DISMIS_D	Date the court dismissed the foreclosure for whatever reason.	Date	8	650	657
MORT_PMT	Periodic or total payment on the mortgage.	Numeric	7.2	658	664
MORT_RATE	Mortgage interest rate in decimal form. For example, if the interest rate is 19.5 percent, the value is ".1950."	Numeric	4.3	665	668
MORT_BOOK_1	Number of the local records book where the clerk filed the property, or the liber number.	Char	5	669	673
MORT_PAGE_1	Page number in the local records book where the clerk filed the property.	Char	5	674	678
MORT_BOOK_2	If MORT_BOOK_1 is the liber number, this field contains the portfolio number of the property.	Char	5	679	683
MORT_PAGE_2	Page number corresponding to MORT_BOOK_2.	Char	5	684	688
MORT_RECRD_D	Date the clerk recorded the mortgage in the local record book.	Date	8	689	696
MORT_DUE_D	Mortgage due date.	Date	8	697	704
LIEN_FILE_NUM	Number the land records office provided in the property's county.	Char	15	705	719
LIEN_CASE_NUM	Case number that the bank holding the lien assigned.	Char	15	720	734
LIEN_D	Date the court established the lien.	Date	8	735	742
LIEN_BOOK	Number of the local records book where the clerk filed the lien.	Char	5	743	747
LIEN_PAGE	Page number in the local records book where the clerk filed the lien.	Char	5	748	752
LIEN_AOL	Indicates whether there was a response to the lien. Valid values are:	Char	1	753	753

	Y = Yes N = No				
LIEN_RLSE_D	Date the clerk filed the lien release (the confirmation of the lien's payment).	Date	8	754	761
LIEN_RLSE_BOOK	Number of the local records book where the clerk filed the lien release.	Char	5	762	766
LIEN_RLSE_PAGE	Page number in the local records book where the clerk filed the lien release.	Char	5	767	771
LIEN_LITIG_D	Lien foreclosure date.	Date	8	772	779
LIEN_LITIG_BOOK	Number of the local records book where the clerk filed the foreclosed lien.	Char	5	780	784
LIEN_LITIG_PAGE	Page number in the local records book where the clerk filed the foreclosed lien.	Char	5	785	789

Import Data From a File

Use the **Execution Window** to import into AIM data that you received from an agency or attorney. The steps are the same for all the import files except payments. To import data from a payment file, see Import Data From a Payment File. To view processing errors so you can correct them, see Processing Reports. For more information about a specific file type, see Import File Layouts.

To import data from a file

1. In the menu bar, click **Actions**, click **Import**, and then click the file type to import. A dialog box appears.

2. Click the file to import and then click **Open**. The **Execution Window** appears, which shows the progress of the import. If the file format is invalid, an error message appears. If there are no records to import, a notification dialog box appears.
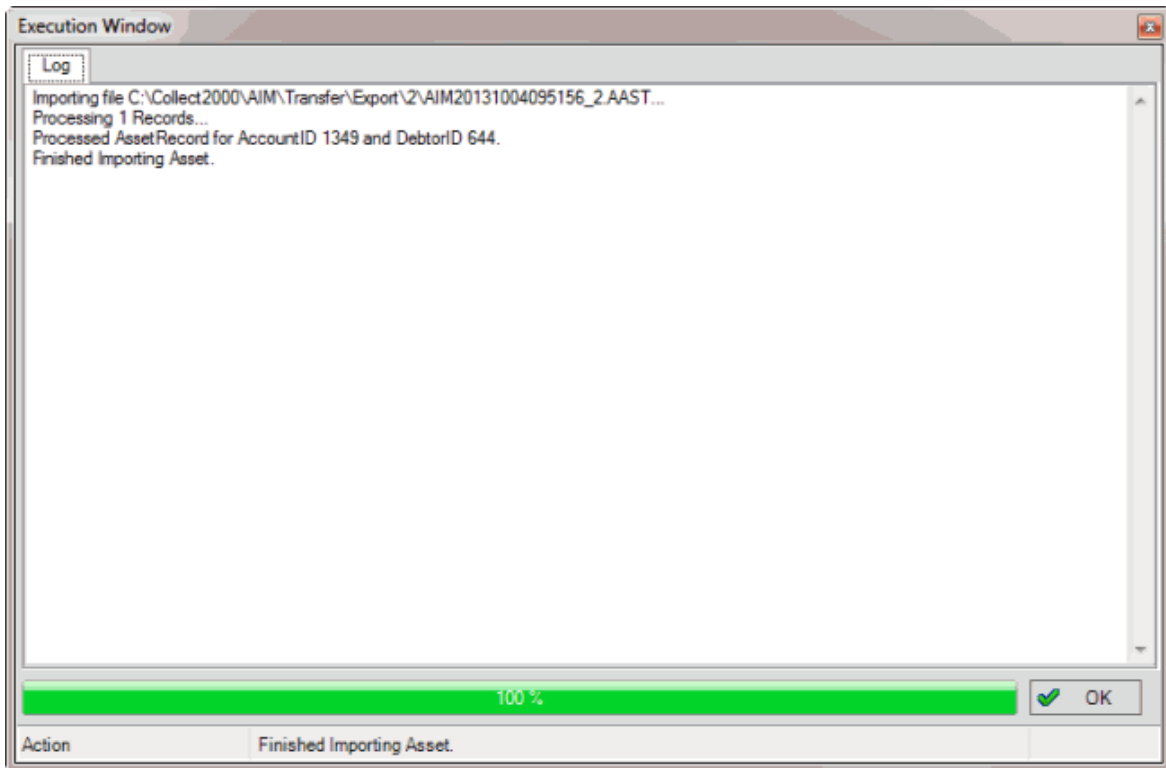
AIM imports the information into the system.

3. Click **OK**.

Import Data From a Payment File

Use the **Execution Window** to import into AIM payment, reversal, and adjustment transactions received from an agency or attorney. AIM assigns the transactions to batches. AIM doesn't include processed transactions in the batch.

A payment file can contain both Paid Agency (PA) and Paid Agency Reversal (PAR) transactions. If a reversal applies to a payment in the same file, the reversal causes an error and you cannot process it. To avoid the issue, either process payments and reversals separately or skip processing for payments and reversals that match (they cancel each other out).

To view processing errors so you can correct them, see Processing Reports. For more information about a specific file type, see Import File Layouts.

To import data from a payment file

1. In the menu bar, click **Actions**, click **Import**, and then click **Payment File (APAY)**. The **Please select the payment file** dialog box appears.

2. Click the file to import and then click **Open**. The **Payment Options** dialog box appears.
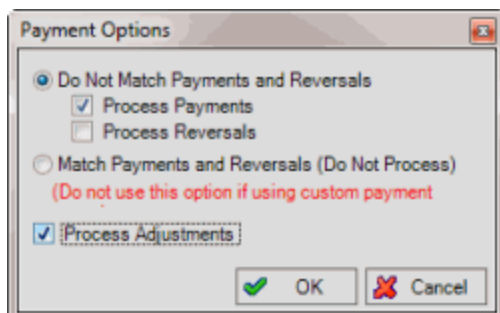
Do Not Match Payments and Reversals: If selected, AIM processes matching payments and reversals within the file, either separately or together depending on which of the following check boxes you selected.

> **Process Payments:** If selected, AIM processes payment transactions only.

> **Process Reversals:** If selected, AIM processes reversal transactions only.

Match Payments and Reversals (Do Not Process): If selected, AIM doesn't process matching payments and reversals within the file because they cancel each other out. This option isn't available for custom payment types.

Process Adjustments: If selected, AIM creates DA and DAR batches for account adjustments.

3. To process payments and reversals separately, do the following:

    1. Click **Do Not Match Payments and Reversals** and then select the **Process Payments** check box.

    2. Clear the **Process Reversals** check box and then process the PA transactions in Latitude.

    3. Import the payment file into AIM.

    4. Select **Do Not Match Payments and Reversals** and then clear the **Process Payments** check box.

    5. Select the **Process Reversals** check box and then process the PAR transactions in Latitude.

4. To skip processing for payments with a matching reversal and only process payments and reversals that don't match, click **Match Payments and Reversals**.

5. Complete the information and then click **OK**. The **Execution Window** appears, which shows the progress of the import. If the file format is invalid, an error message appears. If there are no records to import, a notification dialog box appears.
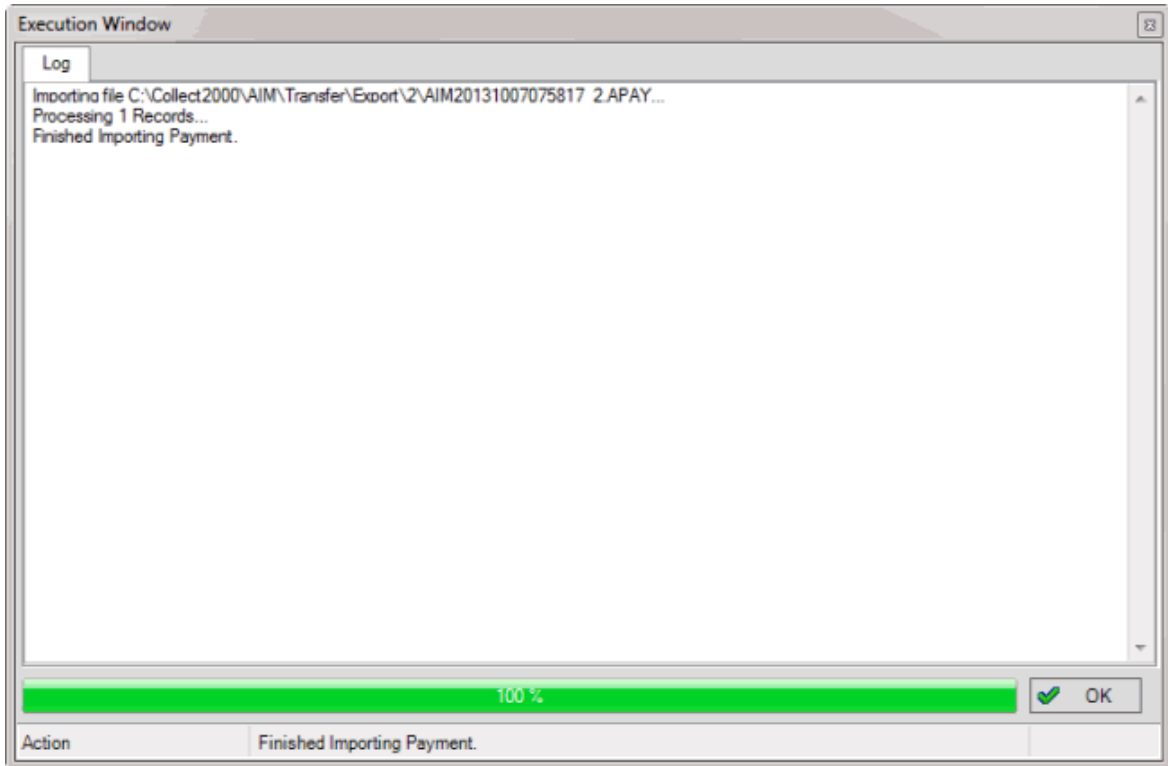
AIM creates batches for the transactions.

6. Click **OK**.

7. To apply the transactions to the accounts, process the batches in Latitude. You can view and modify the transactions before processing them using the **AIM** tab in the **Payment Entry** window. For more information, see the *Latitude* documentation.

Import All AIM Files

Use the **Batch Execution** window to import all files in a specific folder that you received from agencies and attorneys. This option gives your organization the flexibility to handle large file volumes for batch processing. AIM flags files in the specified folder that don't have correct formatting or that AIM processed previously.

Notes:

- To import all YGC formatted files, see Import All YGC Files.

- To view processing errors so you can correct them, generate the corresponding processing reports. For more information, see Processing Reports.

- AIM doesn't include batch numbers for payments that AIM processed. To view information for a payment batch, open the batch in the **Payment Entry** window in Latitude. For more information, see the *Latitude* documentation.

To import all AIM files

1. In the menu bar, click **Actions**, click **Import**, and then click **All AIM Files From Folder**. The **Batch Execution** window appears.
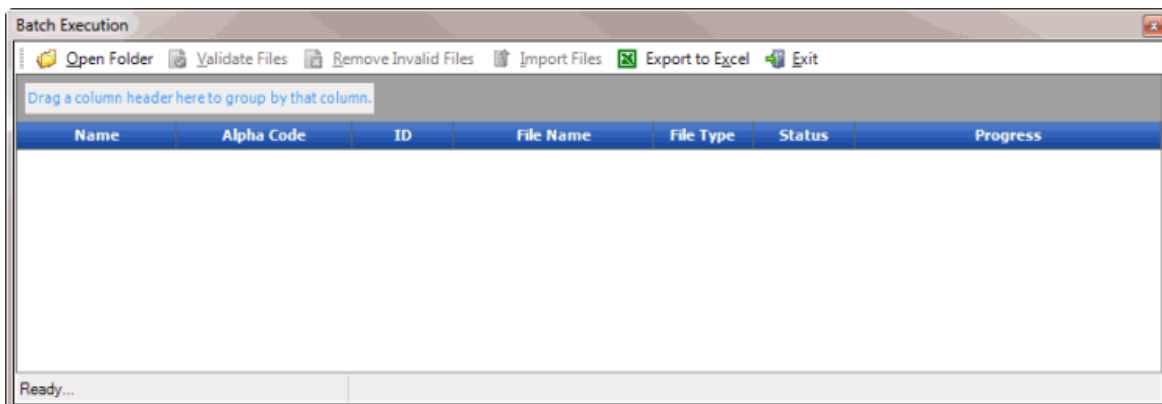
2. In the toolbar, click **Open Folder**. The **Browse for Folder** dialog box appears.

3. Click the folder containing the files and then click **OK**. For example, if several agencies placed files in their own folder within an import folder, click the top import folder to include files for all agencies. All files in the specified folder appear in the **Batch Execution** window.

   If a file is ready for validation, "Ready" appears in the **Status** column. If a file is invalid, "Invalid File Name" appears in the **Status** column and an error message appears.

4. In the toolbar, click **Validate Files**. The system verifies whether the files structure is valid.

5. In the toolbar, click **Remove Invalid Files**. AIM deletes invalid files and only displays valid files in the data grid.

6. If a user selected the **Processed** check box to indicate that AIM processed the file previously, click the row and then press the **Delete** key. In the confirmation dialog box, click **Yes**. Delete each file that AIM processed previously.

7. In the toolbar, click **Import Files**. AIM imports the files and displays a notification dialog box.

8. Click **OK**.

9. In the toolbar, click **Exit**.

10. To view processing history for an agency or attorney, do the steps to View File Processing History.

Import All YGC Files

Use the **Batch Execution** window to import all files in a specific folder that you received from attorneys using the YGC file format. This option gives your organization the flexibility to handle large file volumes for batch processing. AIM flags files in the specified folder that don't have correct formatting or that AIM processed previously.

> **Notes:**
>
> - To import a specific YGC file, use the **YGC File** menu option.
>
> - To view processing errors so you can correct them, generate the corresponding processing reports. For more information, see Processing Reports.
>
> - AIM doesn't include batch numbers for payments that AIM processed. To view information for a payment batch, open the batch in the **Payment Entry** window in Latitude. For more information, see the *Latitude* documentation.

To import all YGC files

1. In the menu bar, click **Actions**, click **Import**, and then click **All YGC Files From Folder**. The **Batch Execution** window appears.
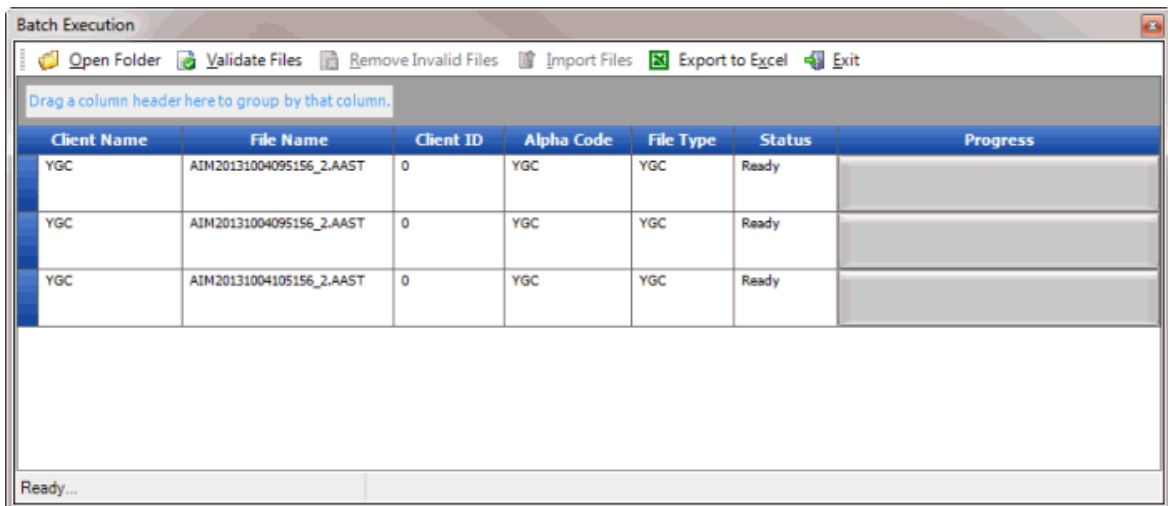
2. In the toolbar, click **Open Folder**. The **Browse for Folder** dialog box appears.

3. Click the folder containing the files and then click **OK**. For example, if several agencies placed files in their own folder within an import folder, click the top import folder to include files all agencies. All files in the specified folder appear in the **Batch Execution** window.

If a file is ready for validation, "Ready" appears in the **Status** column. If a file is invalid, "Invalid File Name" appears in the **Status** column and an error message appears.

4. In the toolbar, click **Validate Files**. The system verifies whether the files structure is valid.

5. In the toolbar, click **Remove Invalid Files**. AIM deletes invalid files and only displays valid files in the data grid.

6. If a user selected the **Processed** check box to indicate that AIM processed the file previously, click the row and then press the **Delete** key. In the confirmation dialog box, click **Yes**. Delete each file that AIM processed previously.

7. In the toolbar, click **Import Files**. AIM imports the files and displays a notification dialog box.

8. Click **OK**.

9. In the toolbar, click **Exit**.

10. To view processing history for an agency or attorney, do the steps to View File Processing History.

Payments

Payments

Latitude uses payment type codes to define how to process transactions. AIM credits payments to the holding agency (typically), whether the payment type is PA (paid agency), PU (paid us), or PC (paid client). The exception is when a grace period is applied for a previous holding agency. Payment type information that AIM sends to the agency or attorney signifies the payment type to apply to the agency's or attorney's system. For example, AIM flags a PU for the agency or attorney as a PC in the agency's or attorney's system.

Update Duplicate Pending Payments

Use the **Update Duplicate Pending Payments** window to update duplicate pending payments (same account and same payment amount) before processing the payments in Latitude. This window only shows payments that exist in open batches.

To update duplicate pending payments

1. In the menu bar, click **Tools** and then click **Update Duplicate Pending Payments**. If there are duplicates payments pending, the **Update Duplicate Pending Payments** window appears. Otherwise, a notification dialog box appears with a message to that effect.

2. Click the plus (+) sign next to an account number to display its duplicate transactions.

3. To change the commission amount applied for the payment to reflect the current fee schedule, click **Reallocate Fees**. AIM updates the fee amount in the **AIMDueAgency** column.

4. To update the information in the window, click **Update Payments**.

5. To delete a duplicate payment, open the batch in the **Debtor Payments** window in Latitude and delete the duplicate payment. For more information, see the *Latitude* documentation.

Payment Type Codes

The following table lists the payment type codes and their description.

Code	Description
DA	**Decreasing Adjustment.** An adjustment to an account that decreases the balance. AIM doesn't calculate any fees toward this amount and doesn't reflect the adjustment on invoices.
DAR	**Decreasing Adjustment Reversal.** An adjustment to an account that increases the balance. AIM doesn't calculate any fees toward this amount and doesn't reflect the adjustment on invoices.
PA	**Paid Agency.** A payment to an outside agency or attorney that is collecting debtor payments for your organization.
PAR	**Paid Agency Reversal / Bounce.** A payment by check to an outside agency or attorney collecting on your organization's behalf where the check did not clear.
PC	**Paid to Client.** A payment to your customer, where your organization holds the account.
PCR	**Paid Client Reversal / Bounce.** A payment by check to your customer where the check did not clear, and your organization holds the account.
PU	**Paid to Us.** A payment sent directly to your organization.
PUR	**Paid Us Reversal / Bounce.** A payment by check sent directly to your organization where the check did not clear.

Payment Scenarios

The following table illustrates how payments are applied for net and gross accounting formats.

Agency A: Net accounting format.

Agency B: Gross accounting format.

Payment Event	Actions
PU added in Latitude; agency A holds account.	PC transaction created for agency A. Fee added in AIMAgencyDue.
PU added in Latitude; agency B holds account.	PC transaction created for agency B. Fee added in AIMAgencyDue.
PA received from agency A.	PA transaction added in Latitude. No fee added in AIMAgencyDue.
PA received from agency B.	PA transaction added in Latitude. Fee added in AIMAgencyDue.

PUR received; agency A or B holds account.	PCR transaction created for agency A or B. Negative fee added in AIMAgencyDue.
PUR received; agency A or B holds account. Applies to payment received before placement.	DA transaction created for agency A or B to decrease the balance.
PU received; agency A or B holds account. Applies to payment received before placement.	DAR transaction created for agency A or B to increase the balance.
PA received from agency A; agency B now holds account. Grace period applied to agency A.	PA transaction added in Latitude for agency A. No fee added in AIMAgencyDue. DA transaction created for agency B.
PAR received from agency A; agency B now holds account. Grace period applied to agency A.	PAR transaction added in Latitude for agency A. No fee added in AIMAgencyDue. DAR transaction created for agency B.

Reports

Reports

Use reports to evaluate agency performance, view account history and transactions, and review agency, batch, and portfolio information.

Report Options

Report Options

Report options allow you to change the view for reports and query results. The following options are available when viewing reports or results:

- Arrange report column headings.

- Pin a report column.

- Sort the report.

- Group report data.

- Summarize report data.

- Filter report data.

- Set custom filter criteria.

Arrange Report Column Headings

Use a report pane or window to change the order of the columns in a report.

To arrange report column headings

1. Open a report pane or window.

2. Click a column heading and drag it to the new location.

3. When two red arrows appear in the location where you want to place the column, release your mouse.

Pin a Report Column

Use a report pane or window to pin a column in the query results so that it remains stationary when you scroll horizontally.

To pin a report column

1. Open a report pane or window.

2. In the column heading, click the Pushpin icon. The pushpin points down to indicate that the column is pinned.

3. Scroll horizontally in either direction and the pinned column remains stationary.

Sort Report Data

Use a report pane or window to sort data in a report.

To sort report data

1. Open a report pane or window.

2. Click a column heading. An arrow that points upward appears next to the column heading to indicate that AIM sorted the column in ascending order.

3. To sort the column in descending order, click the column heading again. The arrow points downward to indicate that AIM sorted the column in descending order.

Group Report Data

Use a report pane or window to group data in a report.

To group report data

1. Open a report pane or window.

2. Click a column heading, drag it into the space above the column headings, and drop it. AIM groups the accounts on the specified column.

3. To view the accounts in a group, click the plus sign (+) next to the group to expand it. The following example shows the report grouped by tier.

4. To add a group within a group, expand a group, click a column heading, drag it into the space above the column headings, and drop it. The following example shows the report grouped by tier and name.

5. AIM sorts the groups in ascending order by default. To change the sort for a group, click the group heading.

6. To delete a group, click the group heading and drag and drop it back into the query results space.

Summarize Report Data

Use a report pane or window to summarize data in a report.

To summarize report data

1. Open a report pane or window.

2. In the column heading, click the Sigma icon. The **Select Summaries** dialog box appears. The options available are based on the item's data type.

3. Select the calculations to perform on the data and then click **OK**. The result appears in the last row of the data grid. If multiple tiers exist, AIM calculates the date for each tier and displays the results in the last row for each tier.

Filter Report Data

Use a report pane or window to filter data in a report.

To filter report data

1. Open a report pane or window.

2. In the column to filter, click the Funnel icon. A list of options for the specified column appears.

(All): If selected, AIM doesn't filter the report.

(Custom): If selected, allows you to set custom filtering conditions.

(Blanks): If selected, AIM limits the report to accounts with a blank or null value in the specified column.

(NonBlanks): If selected, AIM limits the report to accounts that don't have a blank or null value in the specified column.

3. Click any value other than **(Custom)**. AIM closes the list closes and limits the report to the records that match the specified filter.

4. To set custom filter criteria, do the steps to Set Custom Filter Criteria for a Report.

Set Custom Filter Criteria for a Report

Use a report pane or window to customize selection criteria for any column in a report.

To set custom filter criteria for a report

1. Open a report pane or window.

2. In the column heading of the column to filter, click the Funnel icon. A list of options for the specified column appears.

3. Click **(Custom)**. The **Enter Filter Criteria for...** dialog box appears.

4.   In the **Operand** list box, click an operator. For more information, see Custom Filter Operations.

5.   In the **Operand** list box, click or type an operand. In the following example, the operator is "=
     Equals" and the operand is "Collections Plus Services." The condition appears in the lower
     portion of the dialog box. For example, "[Name] = "Collections Plus Services."

6.   To add a condition, click **Add a condition**. AIM adds a blank operator and operand. Complete the
     information.

7.   To delete a condition, click the condition and then click **Delete Condition**.

8.   If you set multiple conditions, do one of the following:

o To set the filter so that all the conditions have to be true for an account to appear in the results, click **And conditions**. For example, customer does not equal "0000001 - CUSTOMER ONE" and customer does not equal "0000002 - CUSTOMER TWO" means that you want to see accounts for all customers except Customer One and Customer Two.

o To set the filter so that only one condition has to be true for an account to appear in the results, click **Or conditions**. For example, customer equals "0000001 - CUSTOMER ONE" or customer equals "0000002 - CUSTOMER TWO" means that you only want to see accounts for Customer One or Customer Two.

9. When finished, click **OK**.

Custom Filter Operations

The following table describes the operators that are available when setting custom filter criteria for query results, reports, or when previewing account placements. The operators available for a data item are based on the item's data type.

Operator	Description
Equals	Retrieves accounts where the data matches the specified value.
Does not equal	Retrieves accounts where the data does not match the specified value.
Less than	Retrieves accounts where the data is less than the specified value. This operator is for date and numeric data types only.
Less than or equal To	Retrieves accounts where the data is less than or equal to the specified value. This operator is for date and numeric data types only.
Greater than	Retrieves accounts where the data is greater than the specified value. This operator is for date and numeric data types only.
Greater than or equal To	Retrieves accounts where the data is greater than the specified value. This operator is for date and numeric data types only.
Like	Retrieves accounts where data matches the specified pattern. This operator is for alphanumeric data types only.
Matches Regular Expression	Retrieves accounts where the system stores data in the specified format. This operator is for alphanumeric data types only. ^[A-Z] finds all values in uppercase character format only. ^[a-z] finds all values in lowercase character format only.

	^[0-9] finds all values in numeric format only.
	^[A-Za-z] finds all values in mixed case character format.
	^[A-Za-z] finds all values in mixed case character format.
	^[^0-9]+$ finds all values with a numeric format and dollar sign.
	^[A-Za-z0-9] [A-Za-z0-9_]*$ finds all values of mixed case and currency.
Starts with	Retrieves accounts where data starts with the specified character or characters. This operator is for alphanumeric data types only.
Contains	Retrieves accounts where data contains the specified character or characters. This operator is for alphanumeric data types only.
Ends with	Retrieves accounts where data ends with the specified character or characters. This operator is for alphanumeric data types only.
Does not start with	Retrieves accounts where data does not start with the specified character or characters. This operator is for alphanumeric data types only.
Does not contain	Retrieves accounts where data does not contain the specified character or characters. This operator is for alphanumeric data types only.
Does not end with	Retrieves accounts where data does not end with the specified character or characters. This operator is for alphanumeric data types only.
Does not match	Retrieves accounts where data does not match the specified character or characters. This operator is for alphanumeric data types only.
Not like	Retrieves accounts where data is not like the specified pattern. This operator is for alphanumeric data types only.

Agency/Attorney Evaluator

Agency/Attorney Evaluator

Use the **Agency/Attorney Evaluator** pane to view performance benchmarks for accounts placed with agencies or attorneys within a specified date range. We recommend that you rebuild the data before evaluating the results. For more information, see Rebuild Agency or Attorney Evaluator Data.

Specify Evaluation Parameters

Use the **Agency/Attorney Evaluator** pane to specify parameters for evaluating agency and attorney placements.

To specify evaluation parameters

1. In the menu bar, click **Reports**, click **Agency/Attorney Evaluator**. The **Agency/Attorney Evaluator** pane appears, with the **Parameters** tab selected.
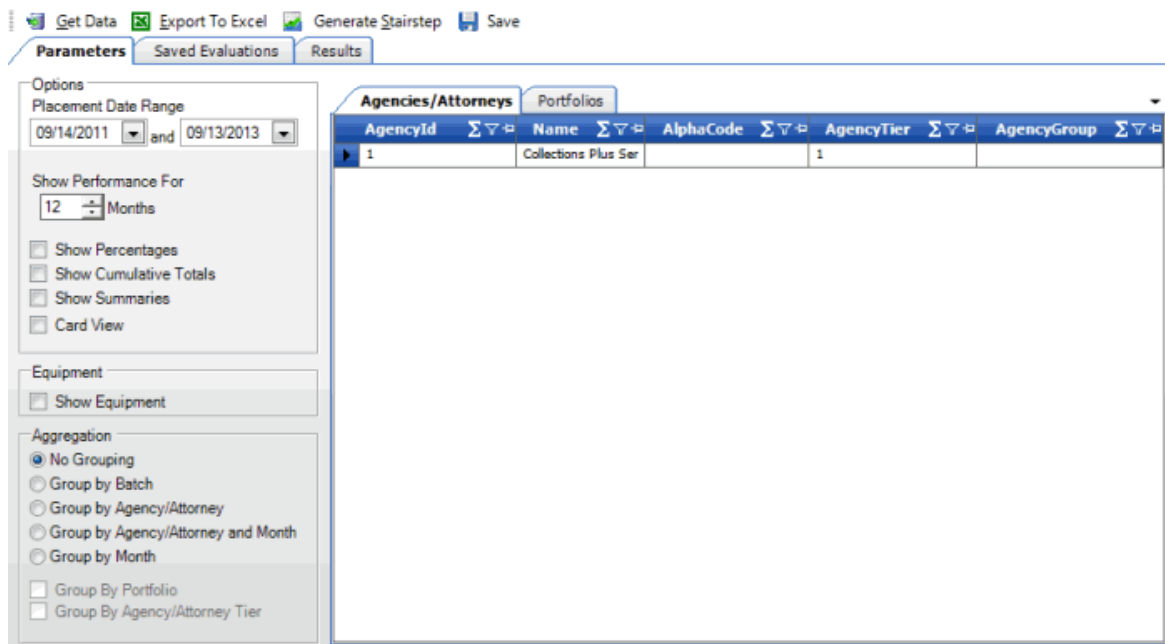
Options

> **Placement Date Range:** Placement start and end dates to evaluate.

> **Show Performance For (Months):** Number of performance months to include in the evaluation results.

> **Show Percentages:** If selected, the evaluation results include the percent of the total dollar amount collected each month.

> **Show Cumulative Totals:** If selected, the evaluation results include cumulative totals for the percent collected each month.

> **Show Summaries:** If selected, the evaluation results include report totals.

> **Card View:** If selected, AIM displays the evaluation results in a card view.

Equipment

> **Show Equipment:** If selected, the evaluation results include equipment.

Aggregation

> **No Grouping:** If selected, records appear as separate line items in the evaluation results.

Group by Batch: If selected, AIM combines records for the same batch ID in the evaluation results.

Group by Agency/Attorney: If selected, AIM combines records with the same agency or attorney in the evaluation results.

Group by Agency/Attorney and Month: If selected, AIM combines records with the same agency or attorney, and month in the evaluation results.

Group by Month: If selected, AIM combines records for the same month in the evaluation results.

Group by Portfolio: If selected, AIM combines records for the same portfolio in the evaluation results.

Group by Agency/Attorney Tier: If selected, AIM combines records for the same tier in the evaluation results.

2. Specify the option, equipment, and aggregation parameters.

3. On the Agencies/Attorneys tab, click one or more agencies or attorneys to include in the evaluation.

> **Tip:** To select multiple sequential rows, press and hold the **Shift** key and click the first and last sequential row. To select multiple non-sequential rows, press and hold the **Ctrl** key and click each individual row.

4. Click the **Portfolios** tab.

5. Click one or more portfolios to include in the evaluation. To select more than one portfolio, see the previous tip.

6. To save the evaluation, do the following:

    1. In the toolbar, click **Save**. The **Save** dialog box appears.

    2. Type a name and description for the evaluation and then click **Save**. AIM adds the evaluation to the **Saved Evaluations** tab.

Rebuild Agency or Attorney Evaluator Data

Use the **StairStep Manager** window to rebuild the data before you use the **Agency/Attorney Evaluator** tool.

To rebuild agency or attorney evaluator data

1. In the menu bar, click **Tools** and then click **StairStep Manager**. The **StairStep Manager** window appears.
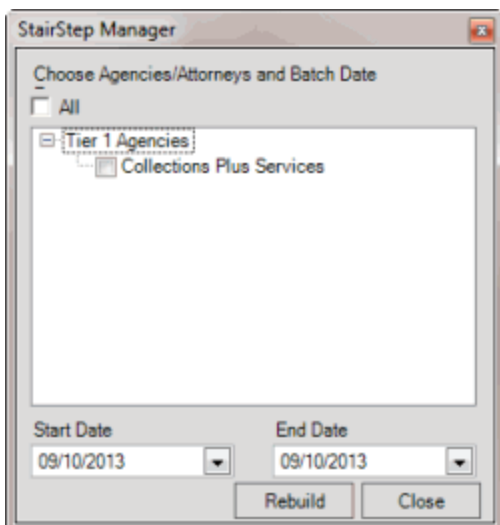
2. Do one of the following:

   - To include all agencies and attorneys in the data rebuild, select the **All** check box.

   - To include specific agencies and attorneys only, expand the **Tier** node and select the check box for each agency and attorney to include.

3. In the **Start Date** list box, type the start date for which to rebuild the data.

4. In the **End Date** list box, type the end date for which to rebuild the data. AIM includes in the data rebuild accounts exported as part of a placement batch within the specified date range.

5. Complete the information and then click **Rebuild**. A notification dialog box appears when the rebuild is complete.

6. Click **OK**.

Generate Evaluation Results

Use the **Results** tab in the **Agency/Attorney Evaluator** pane to generate evaluation results for agency or attorney placements.

To generate evaluation results

1. Rebuild the data before evaluating the results. For more information, see Rebuild Agency or Attorney Evaluator Data.

2. In the **Agency/Attorney Evaluator** pane, click the **Saved Evaluations** tab.
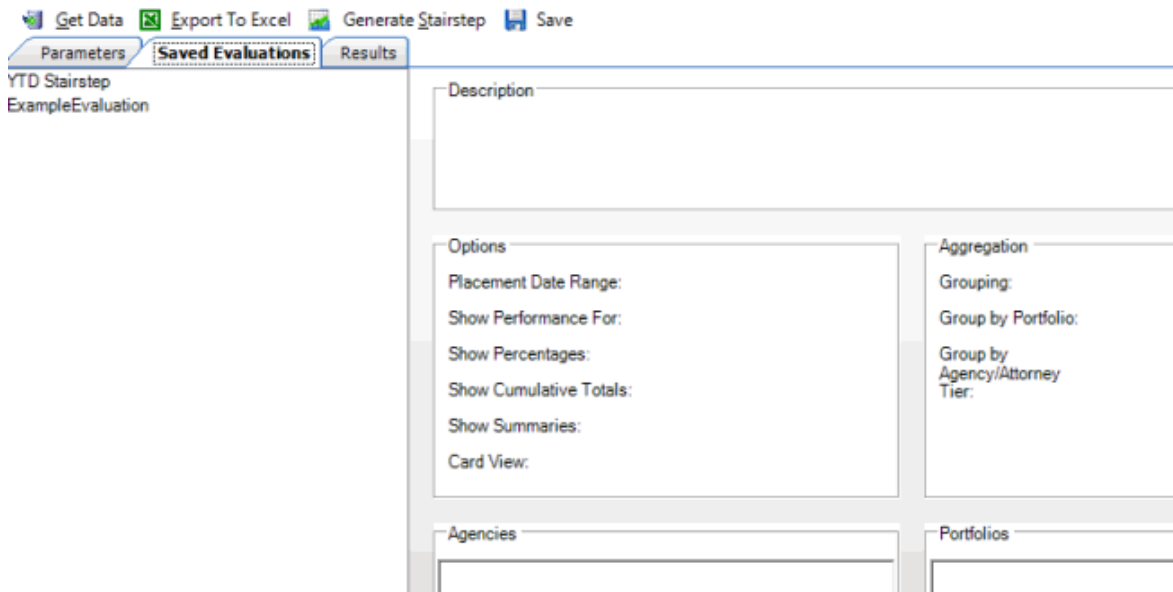
3. Click an evaluation and then, in the toolbar, click **Get Data**. The evaluation results appear on the **Results** tab.

> **Note:** If you specified parameters but haven't saved the evaluation, click **Get Data**.

4. To modify the results view, see Report Options.

Export Evaluation Results to Excel

Use the **Agency/Attorney Evaluator** pane to export evaluation results to Microsoft Excel.

To export evaluation results to Excel

1. Generate evaluation results.

2. In the toolbar in the **Agency/Attorney Evaluator** pane, click **Export to Excel**. The **Save As** dialog box appears.

3. In the **File name** box, type a name for the file and then click **Save**.

Generate a Stair-step Report

Use the **Agency/Attorney Evaluator** pane to generate a report in stair-step format for agency or attorney placements.

To generate a stair-step report

1. Generate evaluation results.

2. In the toolbar in the **Agency/Attorney Evaluator** pane, click **Generate Stairstep**. The **Choose a location...** dialog box appears.

3. In the **File name** box, type a name for the file and then click **Save**.

View Saved Evaluations

Use the **Saved Evaluations** tab in the **Agency/Attorney Evaluator** pane to view saved placement evaluations.

To view saved evaluations

1. In the **Agency/Attorney Evaluator** pane, click the **Saved Evaluations** tab.
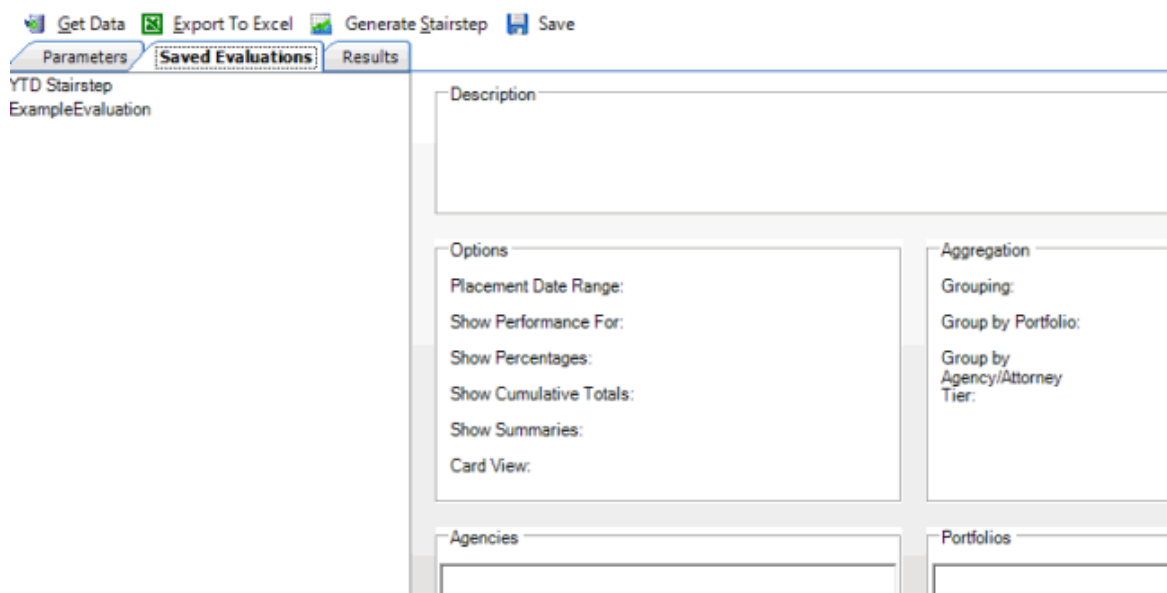
2. Click an evaluation name. Details for the evaluation appear.
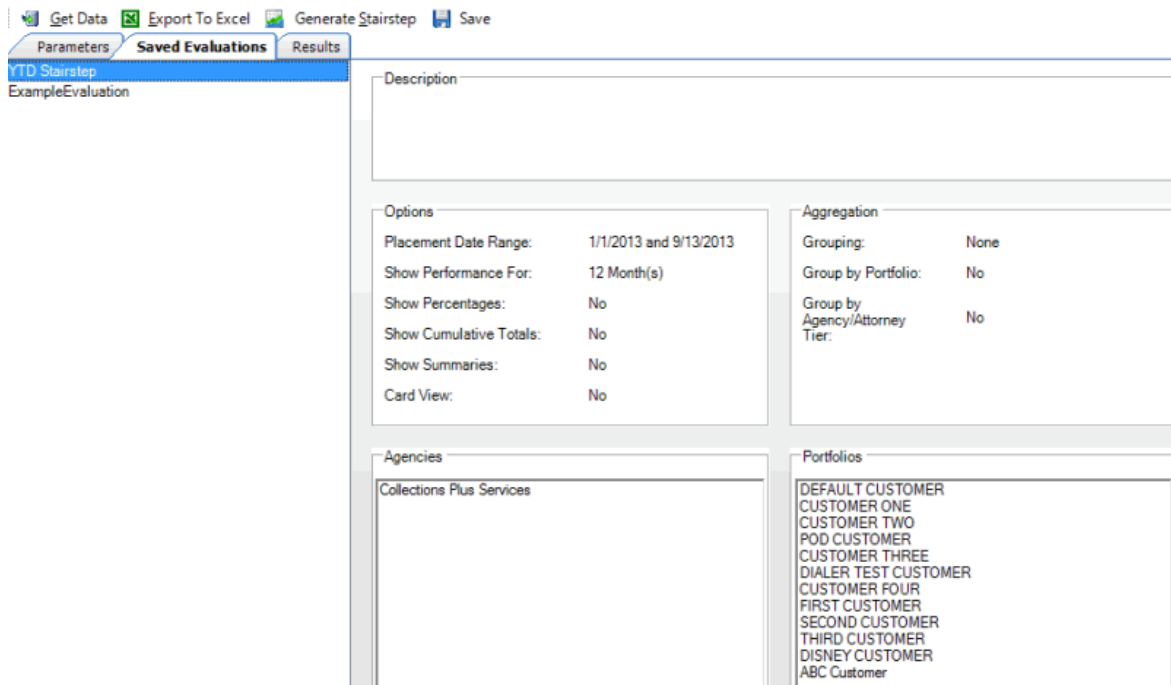
Agency and Attorney Reports

Agency and Attorney Reports

Use agency and attorney reports to view placement information.

Generate an Agency Net Back Details Report

Use the **Agency Net Back Details** pane to generate an **Agency Net Back Details** report. The report displays the amounts that agencies paid for each specified portfolio (customer). The **Net Back** amount is the total amount paid less agency commissions.

To generate an Agency Net Back Details report

1. In the menu bar, click **Reports**, click **Agencies**, and then click the **Agency Net Back Details**. The **Agency Net Back Details** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. In the **Agencies** list box, select the check box for an agency or attorney.

5. In the **Portfolios** list box, select the check box for a portfolio.

6. Click **Get Report**.

7. Click the plus sign (+) to expand sections of the report.

8. To modify the report view, see Report Options.

9. To print the report, click **Print**.

10. To export the report to a Microsoft Excel file, do the following:

    1. Click **Export to Excel**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

11. To export the report to a Comma Separate Value (CSV) file, do the following:

    1. Click **Export to CSV**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

Generate an Agency Net Back Summary Report

Use the **Agency Net Back Summary** pane to generate an **Agency Net Back Summary** report. The report displays a summary of the amounts that agencies paid for each specified portfolio (customer). The **Net Back** amount is the total amount paid less agency commissions.

To generate an Agency Net Back Summary report

1. In the menu bar, click **Reports**, click **Agencies**, and then click the **Agency Net Back Summary**. The **Agency Net Back Summary** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. In the **Agencies** list box, select the check box for an agency or attorney.

5. In the **Portfolios** list box, select the check box for a portfolio.

6. Click **Get Report**.

7. Click the plus sign (+) to expand sections of the report.

8. To modify the report view, see Report Options.

9. To print the report, click **Print**.

10. To export the report to a Microsoft Excel file, do the following:

    1. Click **Export to Excel**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

11. To export the report to a Comma Separate Value (CSV) file, do the following:

    1. Click **Export to CSV**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Gross Placements by Agency Report

Use the **Gross Placements by Agency** pane to generate a **Gross Placements by Agency** report. The report displays placement numbers, by agency and month, for the specified date range.

To generate a Gross Placements by Agency report

1. In the menu bar, click **Reports**, click **Agencies**, and then click the **Gross Placements by Agency**. The **Gross Placements by Agency** pane appears.

2. Click **Get Report**.
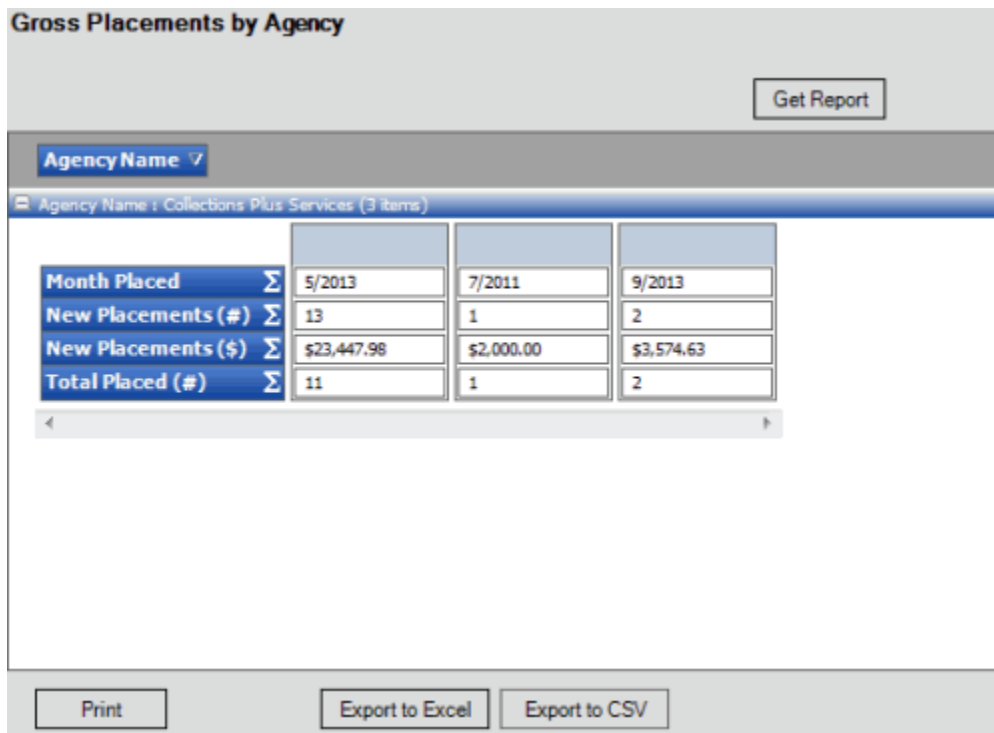
3. Click the plus sign (+) to expand sections of the report.

4. To modify the report view, see Report Options.

5. To print the report, click **Print**.

6. To export the report to a Microsoft Excel file, do the following:

1. Click **Export to Excel**. The **Save As** dialog box appears.

2. In the **File name** box, type a name for the file and then click **Save**.

7. To export the report to a Comma Separate Value (CSV) file, do the following:

1. Click **Export to CSV**. The **Save As** dialog box appears.

2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Vintage Agency by Customer (Agency) Report

Use the **Vintage Agency by Customer (Agency)** pane to generate a **Vintage Agency by Customer (Agency)** report. The report displays placement numbers for each month within the specified date range, sorted by agency.

To generate a Vintage Agency by Customer (Agency) report

1. In the menu bar, click **Reports**, click **Agencies**, and then click the **Vintage Agency by Customer (Agency)**. The **Vintage Agency by Customer (Agency)** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. In the **Agencies** list box, select the check box for an agency or attorney.

5. Click **Get Report**.

6. Click the plus sign (+) to expand sections of the report.

7. To modify the report view, see Report Options.

8. To print the report, click **Print**.

9. To export the report to a Microsoft Excel file, do the following:

   1. Click **Export to Excel**. The **Save As** dialog box appears.

   2. In the **File name** box, type a name for the file and then click **Save**.

10. To export the report to a Comma Separate Value (CSV) file, do the following:

    1. Click **Export to CSV**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Vintage Agency by Customer (Agency and Customer) Report

Use the **Vintage Agency by Customer (Agency and Customer)** pane to generate a **Vintage Agency by Customer (Agency and Customer)** report. The report displays placement numbers for each month within the specified date range, sorted by agency and customer.

To generate a Vintage Agency by Customer (Agency and Customer) report

1. In the menu bar, click **Reports**, click **Agencies**, and then click the **Vintage Agency by Customer (Agency and Customer)**. The **Vintage Agency by Customer (Agency and Customer)** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. In the **Agencies** list box, select the check box for an agency or attorney.

5. In the **Portfolios** list box, select the check box for a portfolio.

6. Click **Get Report**.

7. Click the plus sign (+) to expand sections of the report.

8. To modify the report view, see Report Options.

9. To print the report, click **Print**.

10. To export the report to a Microsoft Excel file, do the following:

    1. Click **Export to Excel**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

11. To export the report to a Comma Separate Value (CSV) file, do the following:

    1. Click **Export to CSV**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Vintage Agency by Customer (Customer) Report

Use the **Vintage Agency by Customer (Customer)** pane to generate a **Vintage Agency by Customer (Customer)** report. The report displays placement numbers for each month within the specified date range, sorted by customer.

To generate a Vintage Agency by Customer (Customer) report

1. In the menu bar, click **Reports**, click **Agencies**, and then click the **Vintage Agency by Customer (Customer)**. The **Vintage Agency by Customer (Customer)** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. In the **Portfolios** list box, select the check box for a portfolio.

5. Click **Get Report**.

6. Click the plus sign (+) to expand sections of the report.

7. To modify the report view, see Report Options.

8. To print the report, click **Print**.

9. To export the report to a Microsoft Excel file, do the following:

   1. Click **Export to Excel**. The **Save As** dialog box appears.

   2. In the **File name** box, type a name for the file and then click **Save**.

10. To export the report to a Comma Separate Value (CSV) file, do the following:

   1. Click **Export to CSV**. The **Save As** dialog box appears.

   2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Vintage Agency by Customer (All) Report

Use the **Vintage Agency by Customer All** pane to generate a **Vintage Agency by Customer All** report. The report displays placement numbers for each month within the specified date range, sorted by customer and agency.

To generate a Vintage Agency by Customer All report

1. In the menu bar, click **Reports**, click **Agencies**, and then click the **Vintage Agency by Customer All**. The **Vintage Agency by Customer All** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. Click **Get Report**.

5. Click the plus sign (+) to expand sections of the report.

6. To modify the report view, see Report Options.

7. To print the report, click **Print**.

8. To export the report to a Microsoft Excel file, do the following:

   1. Click **Export to Excel**. The **Save As** dialog box appears.

   2. In the **File name** box, type a name for the file and then click **Save**.

9. To export the report to a Comma Separate Value (CSV) file, do the following:

   1. Click **Export to CSV**. The **Save As** dialog box appears.

   2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Vintage Agency by Customer Report

Use the **Vintage Agency by Customer** pane to generate a **Vintage Agency by Customer** report. The report displays placement numbers for each month within the specified date range, sorted by customer and agency name.

To generate a Vintage Agency by Customer report

1. In the menu bar, click **Reports**, click **Agencies**, and then click the **Vintage Agency by Customer**. The **Vintage Agency by Customer** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. In the **Agencies** list box, select the check box for an agency or attorney.

5. In the **Portfolios** list box, select the check box for a portfolio.

6. Click **Get Report**.

7. Click the plus sign (+) to expand sections of the report.

8. To modify the report view, see Report Options.

9. To print the report, click **Print**.

10. To export the report to a Microsoft Excel file, do the following:

    1. Click **Export to Excel**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

11. To export the report to a Comma Separate Value (CSV) file, do the following:

    1. Click **Export to CSV**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

Generate an Agency Recovery by Batch Report

Use the **Agency Recovery by Batch** pane to generate an **Agency Recovery by Batch** report. The report displays recovery information for each placement batch.

To generate an Agency Recovery by Batch report

1. In the menu bar, click **Reports**, click **Batches**, and then click **Agency Recovery by Batch**. The **Agency Recovery by Batch** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. Click **Get Report**.

5. Click the plus sign (+) to expand sections of the report.

6. To modify the report view, see Report Options.

7. To print the report, click **Print**.

8. To export the report to a Microsoft Excel file, do the following:

    1. Click **Export to Excel**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

9. To export the report to a Comma Separate Value (CSV) file, do the following:

    1. Click **Export to CSV**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Batch History Report

Use the **Batch History** pane to generate a **Batch History** report. The report displays the history for each placement batch.

To generate a Batch History report

1. In the menu bar, click **Reports**, click **Batches**, and then click **Batch History**. The **Batch History** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. Click **Get Report**.

5. Click the plus sign (+) to expand sections of the report.

6. To modify the report view, see Report Options.

7. To print the report, click **Print**.

8. To export the report to a Microsoft Excel file, do the following:

    1. Click **Export to Excel**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

9. To export the report to a Comma Separate Value (CSV) file, do the following:

1. Click **Export to CSV**. The **Save As** dialog box appears.

2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Current Placement Report

Use the **Current Placements** pane to generate a **Current Placement** report. The report displays accounts that AIM flagged as placed with an outside agency or attorney, grouped by tier. AIM generates and displays this report automatically when you first log on to AIM. You can also generate the report manually.

To generate a Current Placement report

1. In the menu bar, click **Reports** and then click **Current Placements**. The **Current Placements** pane appears.

The **Summaries** section indicates how many accounts the agency or attorney acknowledged (using an Acknowledgment File (AACK) import file) and includes any errors or discrepancies.

2. To modify the report view, see Report Options.

3. To print the report, click **Print**.

Generate an Error Code Report

Use the **Error Codes** pane to generate an **Error Codes** report. The report displays error codes and descriptions. You use the report to view errors that AIM found and reported against batch history.

To generate an Error Code report

1. In the menu bar, click **Reports** and then click **Error Codes**. The **Error Codes** pane appears.

2. Click **Get Report**.
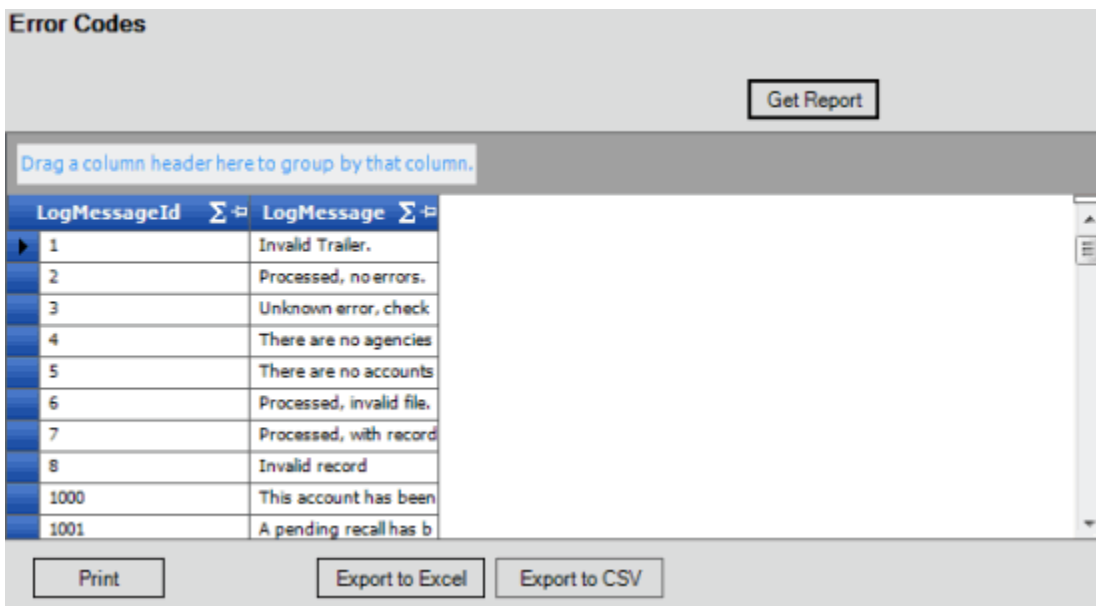
3. To expand the LogMessage column, click the border, drag it to the width you want, and then release it.

4. To modify the report view, see Report Options.

5. To print the report, click **Print**.

6. To export the report to a Microsoft Excel file, do the following:

     1. Click **Export to Excel**. The **Save As** dialog box appears.

     2. In the **File name** box, type a name for the file and then click **Save**.

7. To export the report to a Comma Separate Value (CSV) file, do the following:

1. Click **Export to CSV**. The **Save As** dialog box appears.

2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Judgment Summary All Report

Use the **Judgment Summary All** pane to generate a **Judgment Summary All** report. The report displays summary information for judgments against accounts.

To generate a Judgment Summary All report

1. In the menu bar, click **Reports**, click **Judgments**, and then click **Judgment Summary All**. The **Judgment Summary All** pane appears.

2. Click **Get Report**.

3. Click the plus sign (+) to expand sections of the report.

4. To modify the report view, see Report Options.

5. To print the report, click **Print**.

6. To export the report to a Microsoft Excel file, do the following:

    1. Click **Export to Excel**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

7. To export the report to a Comma Separate Value (CSV) file, do the following:

    1. Click **Export to CSV**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Judgment Summary Mismatches Report

Use the **Judgment Summary Mismatches** pane to generate a **Judgment Summary Mismatches** report. The report displays summary information for mismatches judgments against accounts.

To generate a Judgment Summary Mismatches report

1. In the menu bar, click **Reports**, click **Judgments**, and then click **Judgment Summary Mismatches**. The **Judgment Summary Mismatches** pane appears.

2. Click **Get Report**.
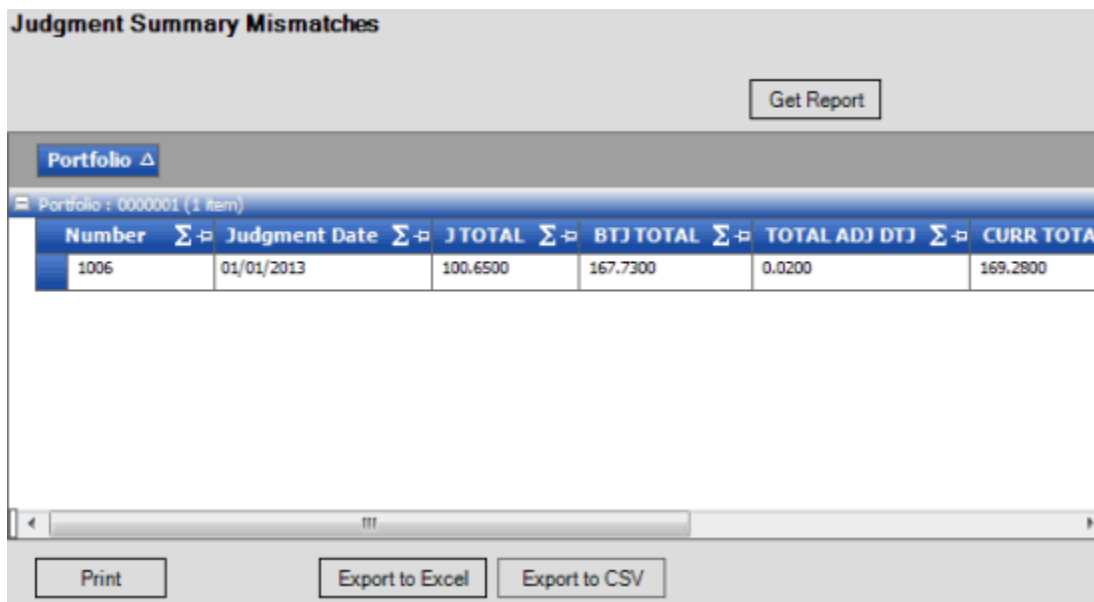
3. Click the plus sign (+) to expand sections of the report.

4. To modify the report view, see Report Options.

5. To print the report, click **Print**.

6. To export the report to a Microsoft Excel file, do the following:

    1. Click **Export to Excel**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

7. To export the report to a Comma Separate Value (CSV) file, do the following:

    1. Click **Export to CSV**. The **Save As** dialog box appears.

2. In the **File name** box, type a name for the file and then click **Save**.

Legal Reports

Legal Reports

Use legal reports to view legal ledger information.

Generate a Duplicate Legal Ledger Entries by Created Date Report

Use the **Duplicate Legal Ledger Entries by Created Date** pane to generate a **Duplicate Legal Ledger Entries by Created Date** report. The report displays duplicate legal ledger entries, sorted by the date created.

To generate a Duplicate Legal Ledger Entries by Created Date report

1. In the menu bar, click **Reports**, click **Legal**, click **Cost_and_Fees**, and then click **Duplicate Legal Ledger Entries by Created Date**. The **Duplicate Legal Ledger Entries by Created Date** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. Click **Get Report**.

5. Click the plus sign (+) to expand sections of the report.

6. To modify the report view, see Report Options.

7. To print the report, click **Print**.

8. To export the report to a Microsoft Excel file, do the following:

    1. Click **Export to Excel**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

9. To export the report to a Comma Separate Value (CSV) file, do the following:

    1. Click **Export to CSV**. The **Save As** dialog box appears.

   2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Legal Ledger Entries (Exported but Never Updated) by Exported Date Report

Use the **Legal Ledger Entries (Exported but Never Updated) by Exported Date** pane to generate a **Legal Ledger Entries (Exported but Never Updated) by Exported Date** report. The report displays legal ledger entries that AIM exported but didn't update, sorted by the date exported.

To generate a Legal Ledger Entries (Exported but Never Updated) by Exported Date report

1. In the menu bar, click **Reports**, click **Legal**, click **Cost_and_Fees**, and then click **Legal Ledger Entries (Exported but Never Updated) by Exported Date**. The **Legal Ledger Entries (Exported but Never Updated) by Exported Date** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. Click **Get Report**.

5. Click the plus sign (+) to expand sections of the report.

6. To modify the report view, see Report Options.

7. To print the report, click **Print**.

8. To export the report to a Microsoft Excel file, do the following:

   1. Click **Export to Excel**. The **Save As** dialog box appears.

   2. In the **File name** box, type a name for the file and then click **Save**.

9. To export the report to a Comma Separate Value (CSV) file, do the following:

   1. Click **Export to CSV**. The **Save As** dialog box appears.

   2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Legal Ledger Entries (Never Exported for Approval) by Created Date Report

Use the **Legal Ledger Entries (Never Exported for Approval) by Created Date** pane to generate a **Legal Ledger Entries (Never Exported for Approval) by Created Date** report. The report displays legal ledger entries that AIM didn't export for approval, sorted by the date created.

To generate a Legal Ledger Entries (Never Exported for Approval) by Created Date report

1. In the menu bar, click **Reports**, click **Legal**, click **Cost_and_Fees**, and then click **Legal Ledger Entries (Never Exported for Approval) by Created Date**. The **Legal Ledger Entries (Never Exported for Approval) by Created Date** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. Click **Get Report**.

5. Click the plus sign (+) to expand sections of the report.

6. To modify the report view, see Report Options.

7. To print the report, click **Print**.

8. To export the report to a Microsoft Excel file, do the following:

   1. Click **Export to Excel**. The **Save As** dialog box appears.

   2. In the **File name** box, type a name for the file and then click **Save**.

9. To export the report to a Comma Separate Value (CSV) file, do the following:

   1. Click **Export to CSV**. The **Save As** dialog box appears.

   2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Legal Ledger Entries (Unapproved) by Updated Date Report

Use the **Legal Ledger Entries (Unapproved) by Updated Date** pane to generate a **Legal Ledger Entries (Unapproved) by Updated Date** report. The report displays legal ledger entries that are unapproved, sorted by the date updated.

To generate a Legal Ledger Entries (Unapproved) by Updated Date report

1. In the menu bar, click **Reports**, click **Legal**, click **Cost_and_Fees**, and then click **Legal Ledger Entries (Unapproved) by Updated Date**. The **Legal Ledger Entries (Unapproved) by Updated Date** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. Click **Get Report**.

5. Click the plus sign (+) to expand sections of the report.

6. To modify the report view, see Report Options.

7. To print the report, click **Print**.

8. To export the report to a Microsoft Excel file, do the following:

    1. Click **Export to Excel**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

9. To export the report to a Comma Separate Value (CSV) file, do the following:

    1. Click **Export to CSV**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Legal Ledger Invoices by Invoiced Date Report

Use the **Legal Ledger Invoices by Invoiced Date** pane to generate a **Legal Ledger Invoices by Invoiced Date** report. The report displays legal ledger invoices, sorted by the date invoiced.

To generate a Legal Ledger Invoices by Invoiced Date report

1. In the menu bar, click **Reports**, click **Legal**, click **Cost_and_Fees**, and then click **Legal Ledger Invoices by Invoiced Date**. The **Legal Ledger Invoices by Invoiced Date** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. Click **Get Report**.

5. Click the plus sign (+) to expand sections of the report.

6. To modify the report view, see Report Options.

7. To print the report, click **Print**.

8. To export the report to a Microsoft Excel file, do the following:

    1. Click **Export to Excel**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

9. To export the report to a Comma Separate Value (CSV) file, do the following:

    1. Click **Export to CSV**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Payment History Report

Use the **Payment History** pane to generate a **Payment History** report. The report displays payments received within the specified date range.

To generate a Payment History report

1. In the menu bar, click **Reports** and then click **Payment History**. The **Payment History** pane appears.
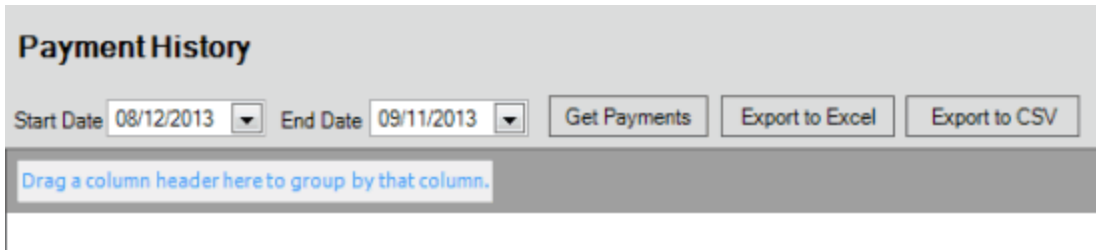
2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. Click **Get Payments**.

5. Click the plus sign (+) to expand sections of the report.

6. To modify the report view, see Report Options.

7. To export the report to a Microsoft Excel file, do the following:

   1. Click **Export to Excel**. The **Save As** dialog box appears.

   2. In the **File name** box, type a name for the file and then click **Save**.

8. To export the report to a Comma Separate Value (CSV) file, do the following:

   1. Click **Export to CSV**. The **Save As** dialog box appears.

   2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Placement History Report

Use the **Placement History** pane to generate a **Placement History** report. The report displays all batches placed with outside agencies and attorneys for the specified date range. The default sort order is by internal batch number.

Note: The batch number displayed in the **Agency/Attorney Evaluator** tool doesn't match the batch number displayed in this report.

To generate a Placement History report

1. Do the steps to Rebuild Agency or Attorney Evaluator Data.

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2. In the menu bar, click **Reports** and then click **Placement History**. The **Placement History** pane appears.
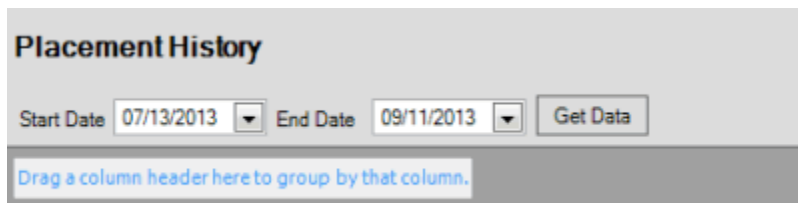
3. In the **Start Date** list box, click the start date for which to display data.

4. In the **End Date** list box, click the end date for which to display data.

5. Click **Get Data**. Batches placed with outside agencies and attorneys for the specified date range appear.

6. To modify the report view, see Report Options.

7. To print the report, click **Print**.

Processing Reports

Processing Reports

Use processing reports to view errors that occur when you import records into your system. We recommend that you run these reports and review them after importing records. A separate processing report is available for each import file type.

Acknowledgment Processing Reports

Acknowledgment Processing Reports

Use acknowledgment reports to view errors that occurred when you imported acknowledgments into your system.

Generate an Acknowledgment Errors Report

Use the **Acknowledgment Errors** pane to generate an **Acknowledgment Errors** report. The report displays errors that occurred when you imported acknowledgments.

To generate an Acknowledgment Errors report

1. In the menu bar, click **Reports**, click **Processing**, click **Acknowledgments**, and then click **Acknowledgment Errors**. The **Acknowledgment Errors** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. In the **Agencies** list box, select the check box for an agency or attorney.

5. Click **Get Report**.

6. To modify the report view, see Report Options.

7. To print the report, click **Print**.

8. To export the report to a Microsoft Excel file, do the following:

    1. Click **Export to Excel**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

9. To export the report to a Comma Separate Value (CSV) file, do the following:

    1. Click **Export to CSV**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Details of Acknowledgment Errors by Date Range By Agency Report

Use the **Details of Acknowledgment Errors by Date Range By Agency** pane to generate a **Details of Acknowledgment Errors by Date Range By Agency** report. The report displays details for errors that occurred when you imported acknowledgments, sorted by date range and agency or attorney.

To generate a Details of Acknowledgment Errors by Date Range By Agency report

1. In the menu bar, click **Reports**, click **Processing**, click **Acknowledgments**, and then click **Details of Acknowledgment Errors by Date Range By Agency**. The **Details of Acknowledgment Errors by Date Range By Agency** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. In the **Agencies** list box, select the check box for an agency or attorney.
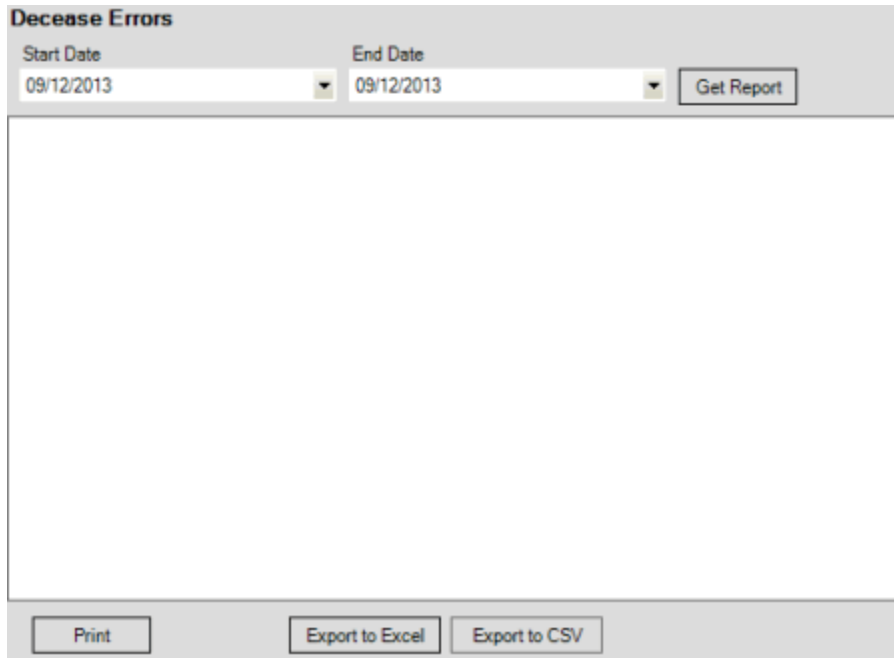
5. Click **Get Report**.

6. To modify the report view, see Report Options.

7. To print the report, click **Print**.

8. To export the report to a Microsoft Excel file, do the following:

1. Click **Export to Excel**. The **Save As** dialog box appears.

2. In the **File name** box, type a name for the file and then click **Save**.

9. To export the report to a Comma Separate Value (CSV) file, do the following:

   1. Click **Export to CSV**. The **Save As** dialog box appears.

   2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Summary of Acknowledgment Errors by Date Range by Agency Report

Use the **Summary of Acknowledgment Errors by Date Range by Agency** pane to generate a **Summary of Acknowledgment Errors by Date Range by Agency** report. The report displays a summary of errors that occurred when you imported acknowledgments, sorted by date range and agency or attorney.

To generate a Summary of Acknowledgment Errors by Date Range by Agency report

1. In the menu bar, click **Reports**, click **Processing**, click **Acknowledgments**, and then click **Summary of Acknowledgment Errors by Date Range by Agency**. The **Summary of Acknowledgment Errors by Date Range by Agency** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. In the **Agencies** list box, select the check box for an agency or attorney.

5. Click **Get Report**.

6. To modify the report view, see Report Options.

7. To print the report, click **Print**.

8. To export the report to a Microsoft Excel file, do the following:

    1. Click **Export to Excel**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

9. To export the report to a Comma Separate Value (CSV) file, do the following:

    1. Click **Export to CSV**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Bankruptcy Errors Report

Use the **Bankruptcy Errors** pane to generate a **Bankruptcy Errors** report. The report displays errors that occurred when you imported bankruptcy information.

To generate a Bankruptcy Errors report

1. In the menu bar, click **Reports**, click **Processing**, click **Bankruptcy**, and then click **Bankruptcy Errors**. The **Bankruptcy Errors** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. Click **Get Report**.

5. To modify the report view, see Report Options.

6. To print the report, click **Print**.

7. To export the report to a Microsoft Excel file, do the following:

    1. Click **Export to Excel**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

8. To export the report to a Comma Separate Value (CSV) file, do the following:

    1. Click **Export to CSV**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Close Errors Report

Use the **Close Errors** pane to generate a **Close Errors** report. The report displays errors that occurred when you imported account closing information.

To generate a Close Errors report

1. In the menu bar, click **Reports**, click **Processing**, click **Closes**, and then click **Close Errors**. The **Close Errors** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. Click **Get Report**.

5. To modify the report view, see Report Options.

6. To print the report, click **Print**.

7. To export the report to a Microsoft Excel file, do the following:

    1. Click **Export to Excel**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

8. To export the report to a Comma Separate Value (CSV) file, do the following:

    1. Click **Export to CSV**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Decease Errors Report

Use the **Decease Errors** pane to generate a **Decease Errors** report. The report displays errors that occurred when you imported deceased information.

To generate a Decease Errors report

1. In the menu bar, click **Reports**, click **Processing**, click **Deceased**, and then click **Decease Errors**. The **Decease Errors** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. Click **Get Report**.

5. To modify the report view, see Report Options.

6. To print the report, click **Print**.

7. To export the report to a Microsoft Excel file, do the following:

    1. Click **Export to Excel**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

8. To export the report to a Comma Separate Value (CSV) file, do the following:

    1. Click **Export to CSV**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

Demographics Processing Reports

Demographics Processing Reports

Use demographics reports to view errors that occurred when you imported demographic information into your system.

Generate an Address Update Errors Report

Use the **Address Update Errors** pane to generate an **Address Update Errors** report. The report displays errors that occurred when you imported address updates.

To generate an Address Update Errors report

1. In the menu bar, click **Reports**, click **Processing**, click **Demographics**, and then click **Address Update Errors**. The **Address Update Errors** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. Click **Get Report**.

5. To modify the report view, see Report Options.

6. To print the report, click **Print**.

7. To export the report to a Microsoft Excel file, do the following:

    1. Click **Export to Excel**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

8. To export the report to a Comma Separate Value (CSV) file, do the following:

    1. Click **Export to CSV**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Phone Update Errors Report

Use the **Phone Update Errors** pane to generate a **Phone Update Errors** report. The report displays errors that occurred when you imported phone updates.

To generate a Phone Update Errors report

1. In the menu bar, click **Reports**, click **Processing**, click **Demographics**, and then click **Phone Update Errors**. The **Phone Update Errors** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. Click **Get Report**.

5. To modify the report view, see Report Options.

6. To print the report, click **Print**.

7. To export the report to a Microsoft Excel file, do the following:

    1. Click **Export to Excel**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

8. To export the report to a Comma Separate Value (CSV) file, do the following:

    1. Click **Export to CSV**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

Payment Processing Reports

Payment Processing Reports
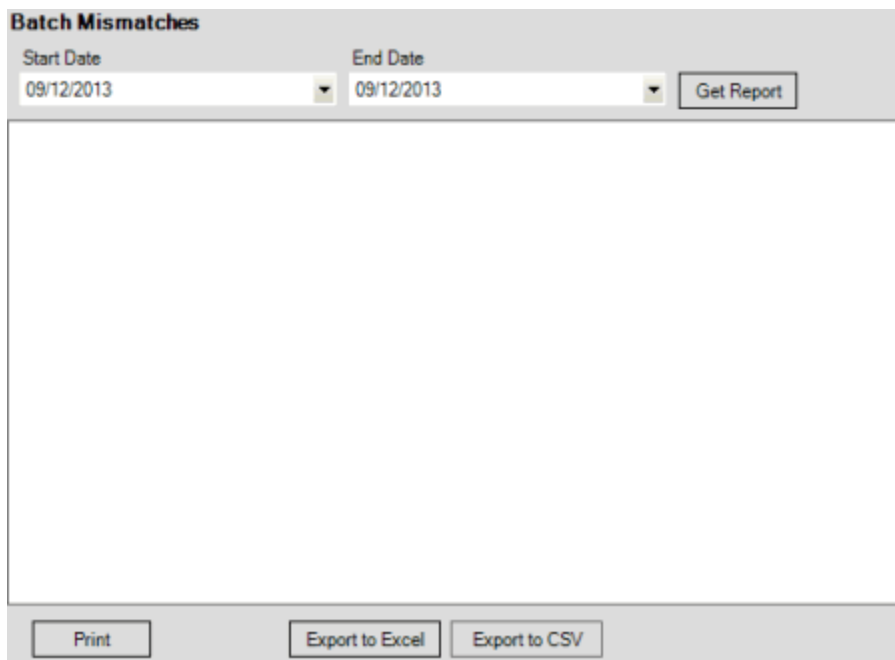
Use demographics reports to view errors that occurred when you imported payments into your system.

Generate a Batch Mismatches Report

Use the **Batch Mismatches** pane to generate a **Batch Mismatches** report. The report displays the imported payment batches that don't match up to payment batches in AIM.

To generate a Batch Mismatches report

1. In the menu bar, click **Reports**, click **Processing**, click **Payments**, and then click **Batch Mismatches**. The **Batch Mismatches** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.
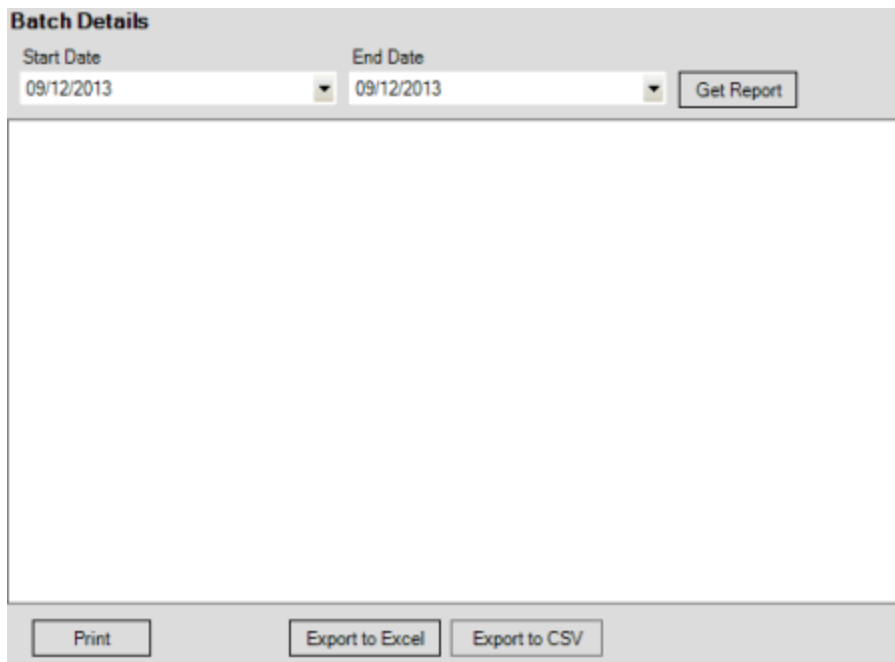
4. Click **Get Report**.

5. To modify the report view, see Report Options.

6. To print the report, click **Print**.

7. To export the report to a Microsoft Excel file, do the following:

    1. Click **Export to Excel**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

8. To export the report to a Comma Separate Value (CSV) file, do the following:

    1. Click **Export to CSV**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

Generate a CPAY Details Report

Use the **CPAY Details** pane to generate a **CPAY Details** report. The report displays details for transactions in CPAY files to report to the agencies or attorneys holding the accounts. AIM uses CPAY files to report payments, reversals, and adjustments to the agencies and attorneys holding the accounts.

To generate a CPAY Details report

1. In the menu bar, click **Reports**, click **Processing**, click **Payments**, and then click **CPAY Details**. The **CPAY Details** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. Click **Get Report**.

5. To modify the report view, see Report Options.

6. To print the report, click **Print**.

7. To export the report to a Microsoft Excel file, do the following:

    1. Click **Export to Excel**. The **Save As** dialog box appears.

2. In the **File name** box, type a name for the file and then click **Save**.

8. To export the report to a Comma Separate Value (CSV) file, do the following:

   1. Click **Export to CSV**. The **Save As** dialog box appears.

   2. In the **File name** box, type a name for the file and then click **Save**.

Generate a CPAY Summary Report

Use the **CPAY Summary** pane to generate a **CPAY Summary** report. The report displays summary information for transactions in CPAY files to report to the agencies or attorneys holding the accounts. AIM uses CPAY files to report payments, reversals, and adjustments to the agencies and attorneys holding the accounts.

To generate a CPAY Summary report

1. In the menu bar, click **Reports**, click **Processing**, click **Payments**, and then click **CPAY Summary**. The **CPAY Summary** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. Click **Get Report**.

5. To modify the report view, see Report Options.

6. To print the report, click **Print**.

7. To export the report to a Microsoft Excel file, do the following:

   1. Click **Export to Excel**. The **Save As** dialog box appears.

   2. In the **File name** box, type a name for the file and then click **Save**.

8. To export the report to a Comma Separate Value (CSV) file, do the following:

   1. Click **Export to CSV**. The **Save As** dialog box appears.

   2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Batch Details Report

Use the **Batch Details** pane to generate a **Batch Details** report. The report displays details for imported payment transactions.

To generate a Batch Details report

1. In the menu bar, click **Reports**, click **Processing**, click **Payments**, and then click **Batch Details**. The **Batch Details** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. Click **Get Report**.

5. To modify the report view, see Report Options.

6. To print the report, click **Print**.

7. To export the report to a Microsoft Excel file, do the following:

    1. Click **Export to Excel**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

8. To export the report to a Comma Separate Value (CSV) file, do the following:

    1. Click **Export to CSV**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Batch Duplicate Details Report

Use the **Batch Duplicate Details** pane to generate a **Batch Duplicate Details** report. The report displays duplicate imported payment transactions for open payment batches only. Review this report when deleting duplicate transactions before processing payments.

To generate a Batch Duplicate Details report

1. In the menu bar, click **Reports**, click **Processing**, click **Payments**, and then click **Batch Duplicate Details**. The **Batch Duplicate Details** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. Click **Get Report**.

5. To modify the report view, see Report Options.

6. To print the report, click **Print**.

7. To export the report to a Microsoft Excel file, do the following:

   1. Click **Export to Excel**. The **Save As** dialog box appears.

   2. In the **File name** box, type a name for the file and then click **Save**.

8. To export the report to a Comma Separate Value (CSV) file, do the following:

   1. Click **Export to CSV**. The **Save As** dialog box appears.

   2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Batch Summary Report

Use the **Batch Summary** pane to generate a **Batch Summary** report. The report displays summary information for imported payment transactions.

To generate a Batch Summary report

1. In the menu bar, click **Reports**, click **Processing**, click **Payments**, and then click **Batch Summary**. The **Batch Summary** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. Click **Get Report**.

5. To modify the report view, see Report Options.

6. To print the report, click **Print**.

7. To export the report to a Microsoft Excel file, do the following:

   1. Click **Export to Excel**. The **Save As** dialog box appears.

   2. In the **File name** box, type a name for the file and then click **Save**.

8. To export the report to a Comma Separate Value (CSV) file, do the following:

   1. Click **Export to CSV**. The **Save As** dialog box appears.

   2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Payment Breakdown Differences Report

Use the **Payment Breakdown Differences** pane to generate a **Payment Breakdown Differences** report. The report displays a breakdown of payment transaction differences.

To generate a Payment Breakdown Differences report

1. In the menu bar, click **Reports**, click **Processing**, click **Payments**, and then click **Payment Breakdown Differences**. The **Payment Breakdown Differences** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. Click **Get Report**.

5. To modify the report view, see Report Options.

6. To print the report, click **Print**.

7. To export the report to a Microsoft Excel file, do the following:

    1. Click **Export to Excel**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

8. To export the report to a Comma Separate Value (CSV) file, do the following:

    1. Click **Export to CSV**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Payment Errors Report

Use the **Payment Errors** pane to generate a **Payment Errors** report. The report displays errors that occurred when you imported payment transactions.

To generate a Payment Errors report

1. In the menu bar, click **Reports**, click **Processing**, click **Payments**, and then click **Payment Errors**. The **Payment Errors** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. Click **Get Report**.

5. To modify the report view, see Report Options.

6. To print the report, click **Print**.

7. To export the report to a Microsoft Excel file, do the following:

    1. Click **Export to Excel**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

8. To export the report to a Comma Separate Value (CSV) file, do the following:

    1. Click **Export to CSV**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Pending Batch Details Report

Use the **Pending Batch Details** pane to generate a **Pending Batch Details** report. The report displays details for payment batches that are pending processing.

To generate a Pending Batch Details report

1. In the menu bar, click **Reports**, click **Processing**, click **Payments**, and then click **Pending Batch Details**. The **Pending Batch Details** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. Click **Get Report**.

5. To modify the report view, see Report Options.

6. To print the report, click **Print**.

7. To export the report to a Microsoft Excel file, do the following:

    1. Click **Export to Excel**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

8. To export the report to a Comma Separate Value (CSV) file, do the following:

    1. Click **Export to CSV**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Pending Batch Summary Report

Use the **Pending Batch Summary** pane to generate a **Pending Batch Summary** report. The report displays summary information for payment batches that are pending processing.

To generate a Pending Batch Summary report

1. In the menu bar, click **Reports**, click **Processing**, click **Payments**, and then click **Pending Batch Summary**. The **Pending Batch Summary** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. Click **Get Report**.

5. To modify the report view, see Report Options.

6. To print the report, click **Print**.

7. To export the report to a Microsoft Excel file, do the following:

    1. Click **Export to Excel**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

8. To export the report to a Comma Separate Value (CSV) file, do the following:

    1. Click **Export to CSV**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

Generate an Active Post Dated Transactions Report

Use the **Active Post Dated Transactions** pane to generate an **Active Post Dated Transactions** report. The report displays active post-dated transactions (PDT) that AIM imported. Each time AIM processes a PDT file, AIM sets previous PDTs to inactive.

To generate an Active Post Dated Transactions report

1. In the menu bar, click **Reports**, click **Processing**, click **Post_Dated_Transactions**, and then click **Active Post Dated Transactions**. The **Active Post Dated Transactions** pane appears.
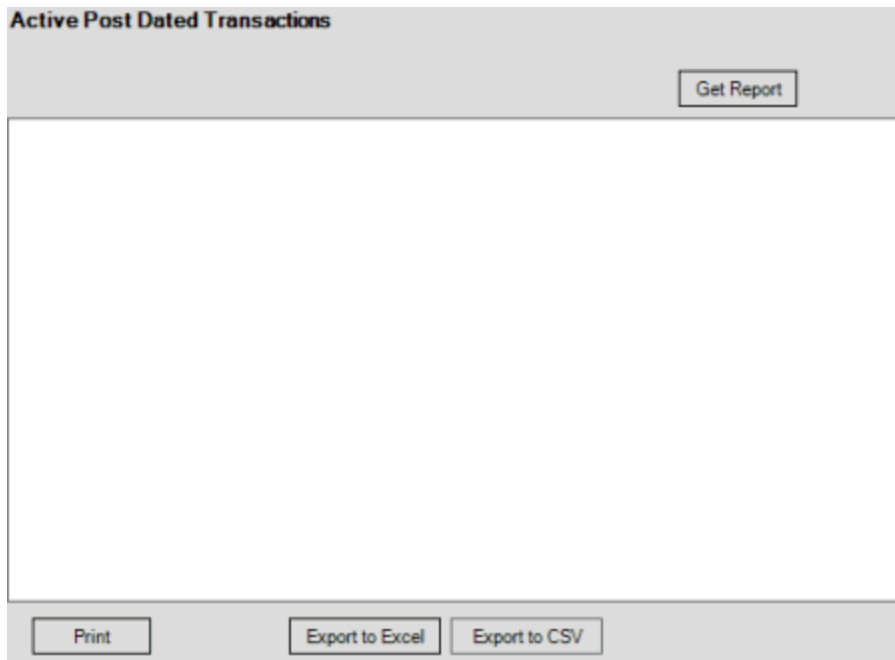
2. Click **Get Report**.

3. To modify the report view, see Report Options.

4. To print the report, click **Print**.

5. To export the report to a Microsoft Excel file, do the following:

    1. Click **Export to Excel**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

6. To export the report to a Comma Separate Value (CSV) file, do the following:

    1. Click **Export to CSV**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Recall Objection Errors Report

Use the **Recall Objection Errors** pane to generate a **Recall Objection Errors** report. The report displays errors that occurred when you imported recall objections.

To generate a Recall Objection Errors report

1. In the menu bar, click **Reports**, click **Processing**, click **Recall_Objections**, and then click **Recall Objection Errors**. The **Recall Objection Errors** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. Click **Get Report**.

5. To modify the report view, see Report Options.

6. To print the report, click **Print**.

7. To export the report to a Microsoft Excel file, do the following:

    1. Click **Export to Excel**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

8. To export the report to a Comma Separate Value (CSV) file, do the following:

    1. Click **Export to CSV**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

Reconciliation Processing Reports

Reconciliation Processing Reports

Use reconciliation reports to view errors that occurred when you imported reconciliation information into your system.

Generate a Details of Reconciliation Errors by Date Range by Agency Report

Use the **Details of Reconciliation Errors by Date Range by Agency** pane to generate a **Details of Reconciliation Errors by Date Range by Agency** report. The report displays details for errors that occurred when you imported reconciliation information, sorted by date range and agency or attorney.

To generate a Details of Reconciliation Errors by Date Range by Agency report

1. In the menu bar, click **Reports**, click **Processing**, click **Reconciliation**, and then click **Details of Reconciliation Errors by Date Range by Agency**. The **Details of Reconciliation Errors by Date Range by Agency** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. In the **Agencies** list box, select the check box for an agency or attorney.

5. Click **Get Report**.

6. To modify the report view, see Report Options.

7. To print the report, click **Print**.

8. To export the report to a Microsoft Excel file, do the following:

1. Click **Export to Excel**. The **Save As** dialog box appears.

2. In the **File name** box, type a name for the file and then click **Save**.

9. To export the report to a Comma Separate Value (CSV) file, do the following:

1. Click **Export to CSV**. The **Save As** dialog box appears.

2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Summary of Reconciliation Errors by Date Range by Agency Report

Use the **Summary of Reconciliation Errors by Date Range by Agency** pane to generate a **Summary of Reconciliation Errors by Date Range by Agency** report. The report displays summary information for errors that occurred when you imported reconciliation information, sorted by date range and agency or attorney.

To generate a Summary of Reconciliation Errors by Date Range by Agency report

1. In the menu bar, click **Reports**, click **Processing**, click **Reconciliation**, and then click **Summary of Reconciliation Errors by Date Range by Agency**. The **Summary of Reconciliation Errors by Date Range by Agency** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. In the **Agencies** list box, select the check box for an agency or attorney.

5. Click **Get Report**.

6. To modify the report view, see Report Options.

7. To print the report, click **Print**.

8. To export the report to a Microsoft Excel file, do the following:

    1. Click **Export to Excel**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

9. To export the report to a Comma Separate Value (CSV) file, do the following:

    1. Click **Export to CSV**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

Generate a Status Errors Report

Use the **Status Errors** pane to generate a **Status Errors** report. The report displays errors that occurred when you imported status updates.

To generate a Status Errors report

1. In the menu bar, click **Reports**, click **Processing**, click **Status**, and then click **Status Errors**. The **Status Errors** pane appears.

2. In the **Start Date** list box, click the start date for which to display data.

3. In the **End Date** list box, click the end date for which to display data.

4. Click **Get Report**.

5. To modify the report view, see Report Options.

6. To print the report, click **Print**.

7. To export the report to a Microsoft Excel file, do the following:

    1. Click **Export to Excel**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.

8. To export the report to a Comma Separate Value (CSV) file, do the following:

    1. Click **Export to CSV**. The **Save As** dialog box appears.

    2. In the **File name** box, type a name for the file and then click **Save**.