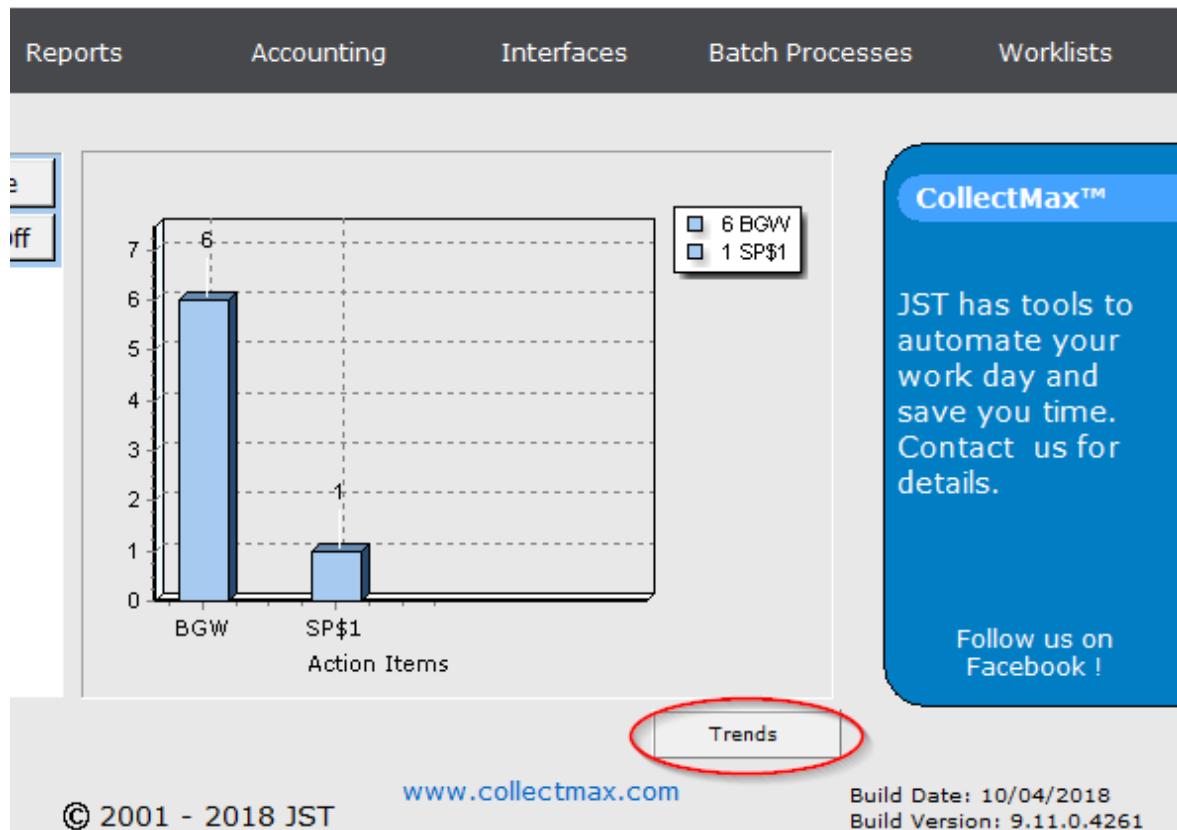


Trends

Trends is a new tool we've added to allow to you to quickly view account placements, legal activity, payments, and productivity.

Note: This is a [Version 9 Feature](#). For information on obtaining Version 9 or any other optional Module, please contact the [Sales Department](#).

To access this feature, click on the Trends button on the main page.



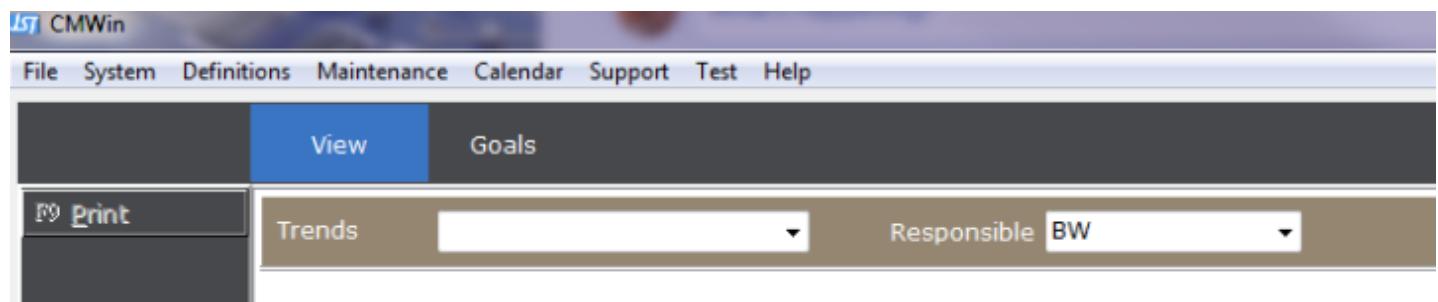
The screenshot shows the JST CMWin main menu with several tabs: Reports, Accounting, Interfaces, Batch Processes, and Worklists. Below the tabs, there is a bar chart titled 'Action Items' with two bars: 'BGW' (6) and 'SP\$1' (1). To the right of the chart is a blue 'CollectMax™' advertisement box containing text about automation and a 'Follow us on Facebook!' link. At the bottom of the screen, there is a red oval highlighting the 'Trends' button in the footer menu, which also includes 'File', 'System', 'Definitions', 'Maintenance', 'Calendar', 'Support', 'Test', and 'Help'.

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www.collectmax.com

Build Date: 10/04/2018
Build Version: 9.11.0.4261

This will take you to the Trends page.



The screenshot shows the JST CMWin Trends page. The top menu bar includes 'File', 'System', 'Definitions', 'Maintenance', 'Calendar', 'Support', 'Test', and 'Help'. Below the menu is a toolbar with 'Print' and a dropdown menu labeled 'Trends'. The main area of the screen is a large, empty space.

From the Trends drop down menu, you can select Placement Inventory, Payments, Legal, or Productivity.

Placement Inventory will show you the number of claims opened.

Trends Placement Inventory Responsible BW For 10/ 8/2018 Refresh

Metrics X

Date Selected Date

Data Point		10/8/2018 Value
# of Placements	1	
# of Open Status Claims that were placed	1	
Total Placement Balances	\$2,650.00	
Total Curr Bal w/ New Int for those claims placed	\$2,650.00	

Payments will show you the debtor payments received, including stages such as pre legal and post judgment.

Trends Payments Operator Firm Refresh

Metrics X

Date Month To Date

Stage All

Data Point		Oct 2018 Value
Total Payment Amounts	\$1,180.00	
# of Payments	3	
# of Pmt Paid In Full	0	
# of Pmt Settled In Full	0	

Legal will show you any legal activity entered.

Trends Legal Responsible Firm Refresh

Metrics X

Date Year To Date

Data Point		2018 Value
# of Filings Added	73	
# of Jmts Added	70	
# of Bank, Wage & Tax Garnishments Added	40	

Productivity will show you various activities and payment plans entered.

Trends Productivity Operator Firm Refresh

Metrics X

Date Year To Date

Show Goals

Data Point		2018 Value
# of Calls made	132	
# of Letters (LTR)	20	
# of Pmt Plans	66	

The Responsible/Operator drop down menu allows you to select by a single user or the entire firm.

If "**Selected Date**" is in the Date field, then the data is displayed based on the date beside the Responsible.

If "**Month To Date**" is selected, then the data is displayed for the calendar month.

If "**Year To Date**" is selected, then the data is displayed for the year.

By checking the Expand option, you can see a breakdown of the respective trend for each day (if month is selected) or month (if year is selected).

Placements

Date Month To Date Expand Days

Compare

Data Point	Oct 8 Value	Oct 9 Value	Oct 10 Value
# of Placements	1	0	0
# of Open Status Claims that were placed	1	0	0
Total Placement Balances	\$2,650.00	\$0.00	\$0.00
Total Curr Bal w/ New Int for those claims placed	\$2,650.00	\$0.00	\$0.00

When the Compare option is checked, you can see the differences based on your criteria selected (day, month, or year).

Trends Placement Inventory Responsible BW For 10/ 8/2018 Refresh

Metrics

Date Selected Date Compare

Compare To 7/18/2018

Data Point	10/8/2018 Value	07/18/2018 Value	Current Difference
# of Placements	1	0	1
# of Open Status Claims that were placed	1	0	1
Total Placement Balances	\$2,650.00	\$0.00	\$2,650.00
Total Curr Bal w/ New Int for those claims placed	\$2,650.00	\$0.00	\$2,650.00

Clicking the restore button to the bottom right will open the Detailed Data. Here, you can view your results by client, claim ordinal, reference number, or responsible/operator.

Detailed Data

By Client

Client: All

Select All Clients
 Select Client Group
 Select Single Client
 Select Client Set

Client	# of Placements	# of Open Status Claims that were placed
HKL-HKL	9	9
GE-GE Test Client	1	1
BWT-BW Test Client	1	1
RJSCRA-SCRA Test	2	2

Note: Responsible/Operator are only available to select if Firm is chosen in the top drop down list.

View Goals

Trends Payments Operator Firm For 10/ 9/2018 Refresh

Goals

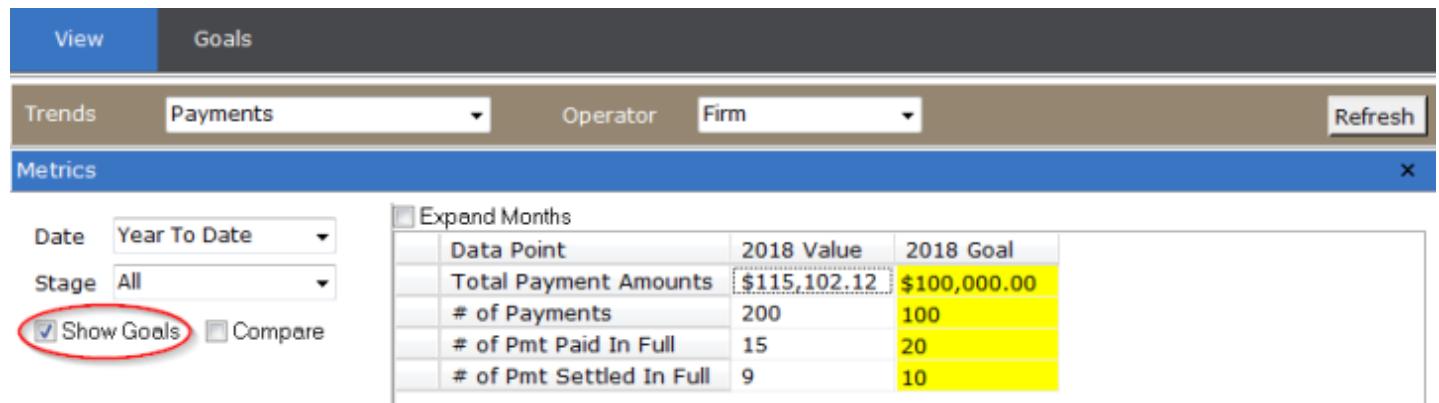
For Monthly Expand

Date Oct

Data Point	Oct 2018 Goal
Total Payment Amounts	5
# of Payments	10
# of Pmt Paid In Full	0
# of Pmt Settled In Full	0

The Goals tab allows you to set performance goals for certain items based on the trend selected.

To set a goal, enter the figures you would like to strive towards and click the Save button on the bottom left corner.



The screenshot shows the Trends module interface. At the top, there are tabs for 'View' and 'Goals'. Below that is a toolbar with 'Trends', 'Payments' (selected), 'Operator', and 'Firm' dropdowns, and a 'Refresh' button. The main area is titled 'Metrics' with a close button 'x'. On the left, there are filters for 'Date' (set to 'Year To Date'), 'Stage' (set to 'All'), and a checked 'Show Goals' option (which is circled in red). To the right is a table titled 'Expand Months' with the following data:

Data Point	2018 Value	2018 Goal
Total Payment Amounts	\$115,102.12	\$100,000.00
# of Payments	200	100
# of Pmt Paid In Full	15	20
# of Pmt Settled In Full	9	10

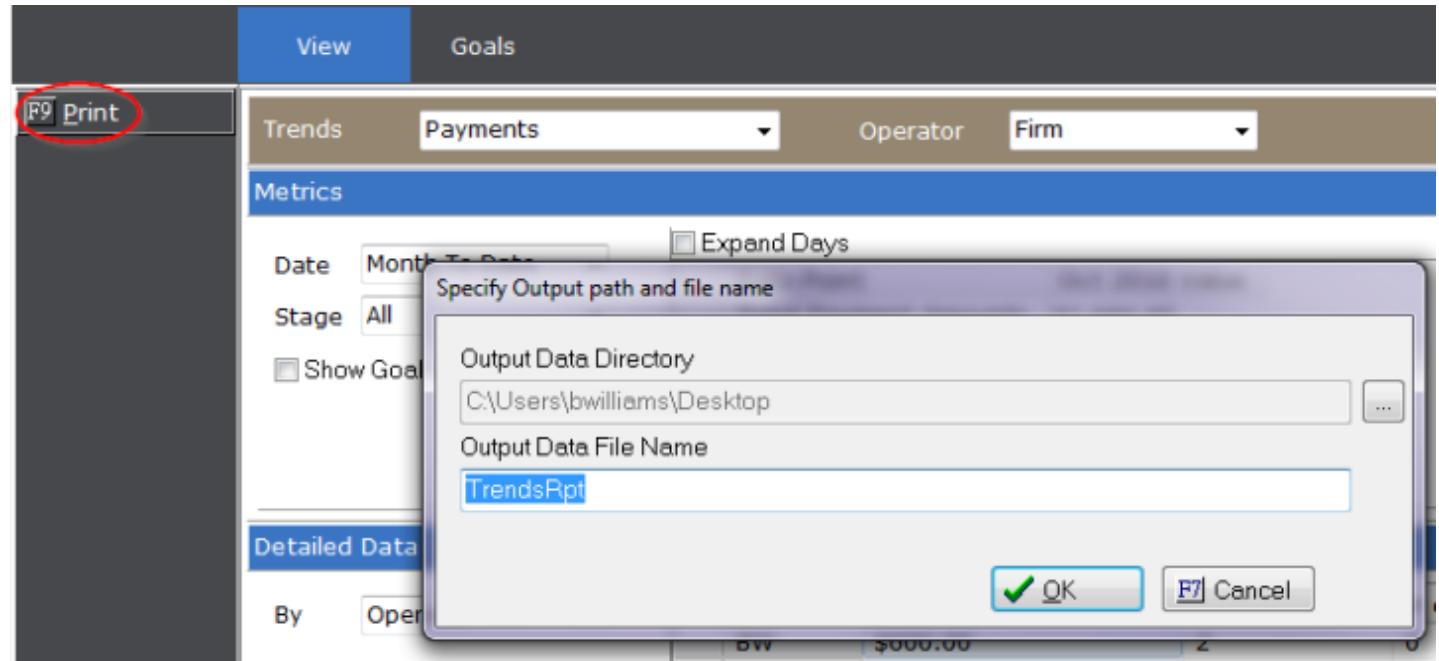
By checking the "Show Goals" option, you can see your progress.

Note: Goals are only available for Payments and Productivity.

The Refresh button will update any information that was added since the time you entered the Trends module.

Hint: Collapsing the Detailed Data section will speed up the refresh process.

The Print button will generate a spreadsheet of the data displayed.



The screenshot shows the Trends module with the 'Print' button highlighted (circled in red). A 'Print' dialog box is open in the foreground. The dialog box has a title 'Specify Output path and file name'. It contains two input fields: 'Output Data Directory' (set to 'C:\Users\bwilliams\Desktop') and 'Output Data File Name' (set to 'TrendsRpt'). At the bottom right of the dialog box are 'OK' and 'Cancel' buttons, with 'OK' being checked.