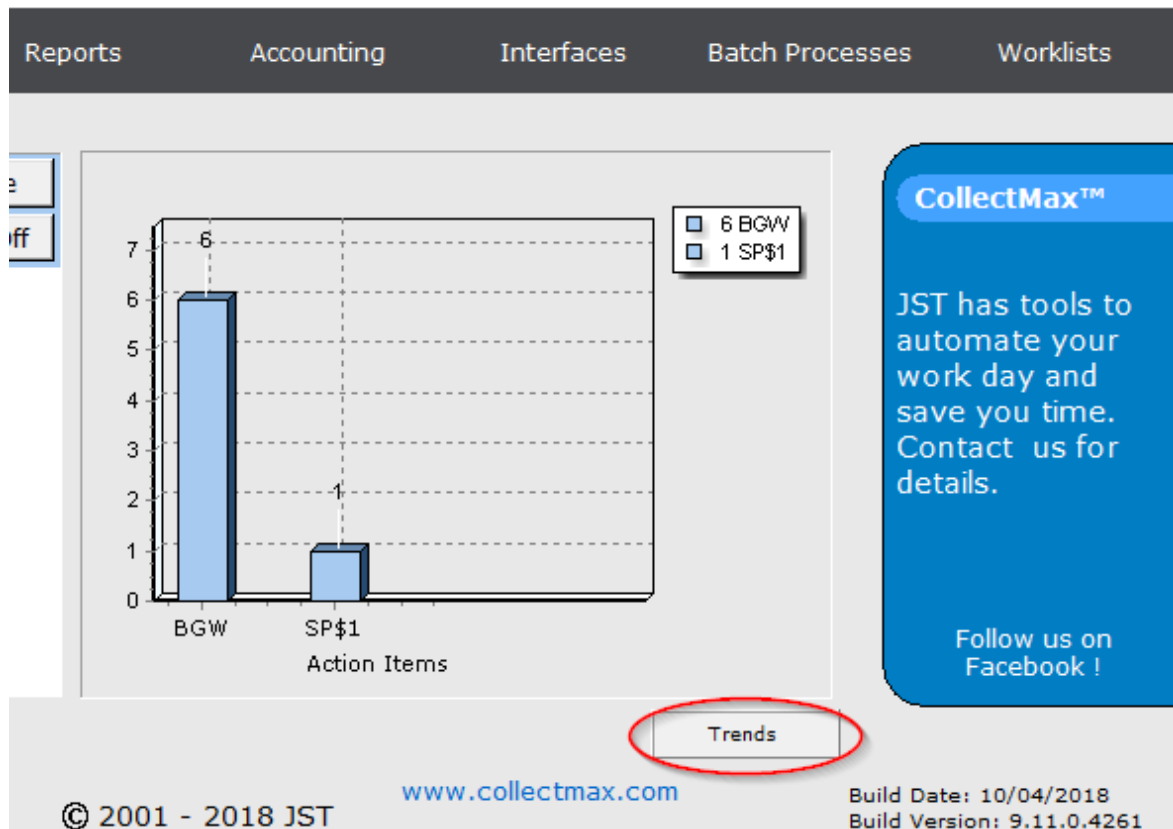


## Trends

Trends is a new tool we've added to allow 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.



This will take you to the Trends page.

The screenshot shows the Trends page interface. At the top is a menu bar with options: File, System, Definitions, Maintenance, Calendar, Support, Test, and Help. Below this is a header section with 'View' and 'Goals' tabs. On the left is a 'Print' button. The main area contains a 'Trends' label, a dropdown menu, and a 'Responsible' label with a dropdown menu showing 'BW'.

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

Date **Selected Date** ☐ Compare

| 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

Date **Month To Date** Stage **All** ☐ Show Goals ☐ Compare ☐ Expand Days

| 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

Date **Year To Date** ☐ Compare ☐ Expand Months

| 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

Date **Year To Date** ☐ Show Goals ☐ Compare ☐ Expand Months

| 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).



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 'Goals' tab in a software interface. At the top, there are tabs for 'View' and 'Goals'. Below them, a 'Trends' dropdown is set to 'Payments' and an 'Operator' dropdown is set to 'Firm'. A 'Refresh' button is on the right. The 'Metrics' section has a 'Date' dropdown set to 'Year To Date' and a 'Stage' dropdown set to 'All'. A checkbox labeled 'Show Goals' is checked and circled in red, with a 'Compare' checkbox next to it. To the right, an 'Expand Months' checkbox is also present. Below these is a table with three columns: 'Data Point', '2018 Value', and '2018 Goal'.

| 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 same interface as before, but with the 'Print' button (labeled 'F9') circled in red. A dialog box titled 'Specify Output path and file name' is open in the foreground. It has two input fields: 'Output Data Directory' with the value 'C:\Users\bwilliams\Desktop' and 'Output Data File Name' with the value 'TrendsRpt'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.