^eGENESYS[™]

Statistics Console

Printable Help

Version 10.0

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Abstract

This document is a printable version of Statistics Console help.

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Introduction to Statistics Console

The Statistics Console program provides analysis information for customer account activity. It includes stair step analysis, batch performance, yield analysis, and production reports.

Note: Beginning with Latitude 10.0 SU1, you can no longer print directly from the **Latitude Statistics Console** window. You can only print from the **Latitude Report Viewer** window that appears when you select a report and click **View**.

Log On to Statistics Console

Use the Latitude Login page to log on to Statistics Console.

To log on to Statistics Console

Do one of the following:

- To open Statistics Console from within Latitude, in the Latitude Main Menu window in Latitude, from the Apps menu, click Statistics Console.
- To open Statistics Console from your desktop, do the following:
 - a. Click Start > All Programs > Latitude Software > Statistics Console. The Latitude Login dialog box appears.

👫 Latitude Login	X
User Name:	
Password:	
Database:	Default Instance
🔲 Log in using Windo	ws authentication
Cancel	Qkay

- b. In the User Name box, type your Latitude user name.
- c. In the **Password** box, type your Latitude password. As you type your password, periods display instead of the typed characters.
- d. Click Okay.

The Statistics Console window appears.

Latitude Statistics Console - [Custor	mers]	
Actions View 1		_ & ×
View Order A Find Customer O000011 - ABC Customer O000006 - CUSTOMER FOUR O000000 - CUSTOMER ONE O000000 - CUSTOMER THREE O000000 - DEFAULT CUSTOME O000000 - DEFAULT CUSTOME O000000 - DISNEY CUSTOMER O000000 - FIRST CUSTOMER O000000 - POD CUSTOMER O0000008 - SECOND CUSTOMEF	2 Batch Reports Performance Reports 4 Selected Customer(s) Selected Customer All Custo Report Scope © Show all months of placement © Show past © 12 © 18 © 24 months © Start with month: Mo ♥ Year ♥	mers Report Options Include all Customers in this Invoice Group Cumulative percentages on Stairstep Cumulative percentages on Stairstep Rebuild Data Cancel Rebuild
	Select Report StairStep Report StairStep Report with Projected PDCs Batch Performance Batch Performance (Internal) Yield Analysis	View

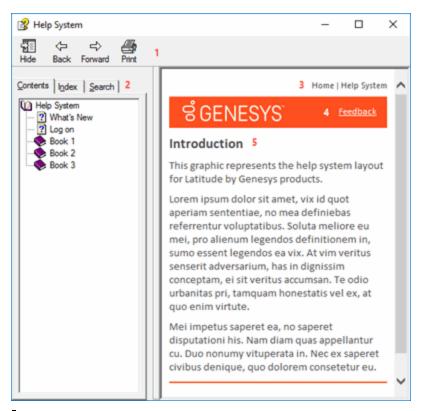
- 1. Menu: Displays the commands that are available for the window.
- 2. Toolbar: Provides options for viewing report settings and exiting the program.
- 3. Selection pane: Displays the available customers, custom groups, or reports.
- 4. **Tabs:** When you click an item in the **Selection** pane, the associated information appears on the selected tab.

Statistics Console Help Overview

Statistics Console help provides you with information for using Statistics Console. You can locate and view any topic using the table of contents, index, and search features within the help system.

To open Statistics Console help

In the "\Latitude Software\Documents" folder, double-click **Statistics_Console.chm**. The **Statistics Console 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 the tabs and **Navigation** pane, move forward and backward through topics, and print the topic displayed currently.
- 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 <u>search feature</u>. 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.

- 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

<u>operators</u>, and <u>nested expressions</u> 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 a 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	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	raccount	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	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.
NFAR	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.

Latitude Report Viewer

Use the Latitude Report Viewer window to view and print a report.

To open the Latitude Report Viewer window

In the Latitude Statistics Console window, after specifying the report parameters, click View. The Latitude Report Viewer window appears.

Batch Performance - Latitude Report Viewer								
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				7800 BELFC SUI JACKSONV	titude RTPARKWAY TE 100 ILLE, FL 32256 0 866-396-2599			т. Ш
	000)0000 - DE	FAULT CUSTO	MER				
	Bate	h Performance	Report			Report Date : Ap	or 4, 2013	
			—— Placements —		Amounts (
Month		Number	Gross Amount	Net Amount	This Month	To Date	Recovery % *	
	2011 mary	14 14	\$29,600.73 \$29,600.73	\$29,600.73 \$29,600.73	\$0.00 \$0.00	\$0.00 \$0.00	0.00	
					п			Ŧ
Current Page N	lo.: 1		To	otal Page No.: 1		Zoom Factor: Page Wid	th	
lcon	De	scriptior	1					
÷	Exp	oorts the	report to a file	2.				
3	Pri	nts the r	eport.					

K	Displays the first page of the report.
•	Displays the previous page of the report.
•	Displays the next page of the report.
	Displays the last page of the report.
1/1	Indicates the report page currently displayed and the total number of pages in the report.
<i>i</i> m	Opens the Find Text dialog box to allow you to search for text within the report.
# +	Increases or decreases the text size when viewing the report on your monitor. Changing the text size here does not affect the size of the text in the printed report.

Batch Reports

The following batch reports are available in Statistics Console:

Stairstep Report: Displays aged placement and recovery analysis for the specified customers and time period.

Stairstep Report with Projected PDCs: Displays aged placement and recovery analysis for the specified customers and includes future recovery percentages based on post-dated entries.

Batch Performance: Displays a detailed analysis of placement batches for the specified customers by month. It includes gross and net amounts for placements and recovery percentages for collection amounts.

Batch Performance (Internal): Displays a detailed analysis of placement batches for the specified customers by month. It includes gross and net amounts for placements and recovery percentages for collection amounts with and without post-dated entries.

Yield Analysis: Displays average balances, fees, and collection amounts for the specified customers and time period.

Generate a Batch Report for a Customer

Use the **Batch Reports** tab to configure and generate a batch report for a customer.

To generate a batch report for a customer

1. In the Latitude Statistics Console window, from the View menu, click Customers. The customer report options appear.

In Latitude Statistics Console - [Customers]						
Actions View						
View Order ♣ Find Customer All Customers 0000000 - DEFAULT CUSTOME 0000000 - CUSTOMER ONE 0000000 - CUSTOMER ONE 0000000 - CUSTOMER TWO 0000003 - POD CUSTOMER TWO 0000000 - CUSTOMER TWO 0000003 - POD CUSTOMER 0000000 - CUSTOMER THREE 00000005 - DIALER TEST CUSTI 0000000 - CUSTOMER FOUR 0000000 - CUSTOMER FOUR 0000000 - CUSTOMER TUSTOMER 0000000 - CUSTOMER FOUR 0000000 - CUSTOMER TUSTOMER 0000000 - CUSTOMER FOUR 0000000 - CUSTOMER TUSTOMER 0000001 - DISNEY CUSTOMER 0000001 - DISNEY CUSTOMER 00000011 - ABC Customer	Batch Reports Performance Reports Selected Customer 0000000 · DEFAU Report Scope Show all months of placement Show past 12 C 18 C 24 months C Start with month: Mo Year	LT CUSTOMER Report Options Include all Customers in this Invoice Group Cumulative percentages on Stairstep Include PDCs for current month Rebuild Data Cancel Rebuild				
	Select Report StairStep Report StairStep Report with Projected PDCs Batch Performance Batch Performance (Internal) Yield Analysis	View				

- 2. To change the order of the customers in the **Selection** pane, do one of the following:
- To sort the customer list by customer code, click **View Order** and then click **Order by Customer Code**.

- To sort the customer list by customer name, click **View Order** and then click **Order by Customer Name**.
- 3. To include inactive customers in the list, click **View Order** and then click **View Inactive Customers**.
- 4. To select a customer, do one of the following:
- In the **Selection** pane, click a customer.
- Do the steps to <u>Search for a Customer</u>.
- 5. On the **Batch Reports** tab, specify the report parameters.

Report Scope section

Show all months of placement: The report includes all business ever received into Latitude.

Show past: The report only incudes business received during the specified number of past months.

Start with month: The report only includes business received from the specified date forward.

Report Options section

Include all Customers in this Invoice Group: If selected, the report includes all customers in the invoice group. This option is available for parent customers only.

Cumulative percentages on Stairstep: If selected, collection percentages increase cumulatively, meaning the last month of collection shows the total collection percent. If cleared, collection percentages are for the month indicated only.

Include PDCs for current month: If selected, the report includes post-dated checks for the current month.

- 6. In the **Rebuild Data** section, click **Rebuild Data**. Statistics Console applies the report parameters.
- 7. In the **Select Report** section, click a report and then click **View**. The **Latitude Report Viewer** window appears.

Note: If you chose to include all customers in the invoice group, the **Stairstep Title** dialog box appears. Type a title for the report and then click **OK**.

Batch Performance - Latitude Report Viewer					
🔮 🚝 К 🔸 🕨	1 /1 m m [⊕] ⋅				
	7800 BEI S JACKSO	Latitude FORTPARKWAY SUITE 100 NVILLE, FL 32256 100 866-396-2599		- E	
0000000 - Batch Perforn	DEFAULT CUSTOMER		Report Date : Apr 4	, 2013	
	Placements	Amounts Co	ollected		
Month Year Number	r <u>Gross Amount</u> <u>Net Amount</u>	This Month	To Date	Recovery % *	
Feb 2011 1		\$0.00	\$0.00	0.00	
Summary 1.	4 \$29,600.73 \$29,600.73	\$0.00	\$0.00	0.00	
Current Page No.: 1	Total Page No.: 1		Zoom Factor: Page Width		

- 8. To print the report, in the toolbar, click the Print icon. The **Print** dialog box appears.
- 9. Modify the settings as necessary and then click **Print**.

Note: For more information about using the **Latitude Report Viewer** window, see <u>Latitude</u> <u>Report Viewer</u>.

Generate a Batch Report for All Customers

Use the **Batch Reports** tab to configure and generate a batch report for all customers.

To generate a batch report for all customers

1. In the Latitude Statistics Console window, from the View menu, click Customers. The customer report options appear.

Latitude Statistics Console - [Custo	mers]
Actions View	_ & ×
View Order M Find Customer All Customers 0000000 - DEFAULT CUSTOME 0000000 - CUSTOMER ONE 0000000 - DEFAULT CUSTOME 0000000 - CUSTOMER TWO 00000003 - POD CUSTOMER 00000000 - CUSTOMER THREE 00000005 - DIALER TEST CUSTI 00000000 - CUSTOMER TEST CUSTOMER 00000006 - CUSTOMER FOUR 00000000 - SECOND CUSTOMER 00000007 - FIRST CUSTOMER 00000000 - DISNEY CUSTOMER 00000011 - ABC Customer	Batch Reports Performance Reports Selected Customer 0000000 · DEFAULT CUSTOMER Selected Customer 0000000 · DEFAULT CUSTOMER Report Scope
	Select Report StairStep Report StairStep Report with Projected PDCs Batch Performance Batch Performance (Internal) Yield Analysis

- 2. In the Selection pane, click the All Customers folder.
- 3. On the **Batch Reports** tab, specify the report scope.

Show all months of placement: The report includes all business ever received into Latitude.

Show past: The report only includes business received during the specified number of past months.

Start with month: The report only includes business received from the specified date forward.

- 4. In the **Rebuild Data** section, click **Rebuild Data**. Statistics Console applies the report parameters.
- 5. In the **Select Report** section, click a report and then click **View**. The **Latitude Report Viewer** window appears.

🛃 Bat	Batch Performance - Latitude Report Viewer								
	3 K	-	▶) 1	/1 🕅 🖞	₩ -				
					7800 BELI S JACKSON	atitude FORTPARKWAY UITE 100 IVILLE, FL 32256 00 866-396-2599			E
			Customer h Performance	-			Report Date :	Apr 4, 2013	
			r	Placements -		Amounts	Collected		
	Month	Year	Number	Gross Amount	Net Amount	This Month	To Date	Recovery % *	
	Feb	2011	. 14	\$29,600.73	\$29,600.73	\$0.00	\$0.00	0.00	
	Apr	2011	9	\$17,210.00	\$17,210.00	\$0.00	\$0.00	0.00	
	May	2011	3	\$2,900.00	\$2,900.00	\$0.00	\$250.00	8.62	
		2011	22	\$40,715.57	\$40,715.57	\$0.00	\$0.00	0.00	
		2011	237	\$259,779.24	\$259,779.24	\$0.00	\$169.00	0.07	
		2011	35	\$109,805.00	\$109,805.00	\$0.00	\$0.00	0.00	
	May		3	\$35,010.00	\$35,010.00	\$0.00	\$0.00	0.00	
	Sum	mary	323	\$495,020.54	\$495,020.54	\$0.00	\$419.00	0.08	-
•							F		
Currer	nt Page N	o.: 1			Total Page No.: 1		Zoom Factor: Page \	Width	

- 6. To print the report, in the toolbar, click the Print icon. The **Print** dialog box appears.
- 7. Modify the settings as necessary and then click **Print**.

Note: For more information about using the **Latitude Report Viewer** window, see <u>Latitude</u> Report Viewer.

Performance Reports

The following performance reports are available in Statistics Console. The reports include post-dated entries for projection purposes:

Customer Collections: Displays total collections and fees for the specified customers and time period.

Customer Collections by Branch: Displays total collections and fees by branch for the specified customers and time period.

Desk Collections: Displays total collections and fees by desk for the specified customers and time period.

Collector Commissions: Displays total collections and commissions (based on the collector fee assigned to the customer) by branch and desk for the specified customers and time period.

Collector Commissions by Customer: Displays total collections and commissions (based on the collector fee assigned to the customer) by customer for the specified customers and time period.

Generate a Performance Report for a Customer

Use the **Performance Reports** tab to configure and generate a performance report for a customer.

To generate a performance report for a customer

1. In the Latitude Statistics Console window, from the View menu, click Customers. The customer report options appear.

Latitude Statistics Console - [Custo	mers]	
Actions View		_ & ×
View Order All Customer All Customers O000000 - DEFAULT CUSTOME O000000 - CUSTOMER ONE O0000002 - CUSTOMER TWO O0000003 - POD CUSTOMER O0000004 - CUSTOMER THREE O0000005 - DIALER TEST CUSTI O0000005 - DIALER TEST CUSTINER O0000007 - FIRST CUSTOMER O0000008 - SECOND CUSTOMER O0000010 - DISNEY CUSTOMER O0000011 - ABC Customer	Batch Reports Performance Reports Selected Customer 0000000 - DEFAL Report Scope	JLT CUSTOMER Report Options Include all Customers in this Invoice Group Cumulative percentages on Stairstep I Include PDCs for current month Rebuild Data Cancel Rebuild
	Select Report StairStep Report with Projected PDCs Batch Performance Batch Performance (Internal) Yield Analysis	View

- 2. To change the order of the customers in the **Selection** pane, do one of the following:
- To sort the customer list by customer code, click **View Order** and then click **Order by Customer Code**.
- To sort the customer list by customer name, click **View Order** and then click **Order by Customer Name**.
- 3. To include inactive customers in the list, click **View Order** and then click **View Inactive Customers**.
- 4. To select a customer, do one of the following:
- In the **Selection** pane, click a customer.
- Do the steps to <u>Search for a Customer</u>.
- 5. Click the **Performance Reports** tab and then specify the report parameters.

Latitude Statistics Console - [Custo	mers]	
Actions View		_ & ×
	Batch Reports Performance Reports Selected Customer Selected Customer 0000000 · DEFAULT CUSTOMER Report Scope • Month of 1 • Date 4/4/2013 • Period from 3/5/2013 • Select Report Report Name Customer Collections Customer Collections by Branch Desk Collector Commissions Collector Commissions Collector Commissions Collector Commissions Betor Commissions Customer	
	Collector Commissions By Customer	
	· · · · · · · · · · · · · · · · · · ·	

Report Scope section

Month of: The report includes all business received into Latitude during the specified month and year. If you specify the current month, the report includes post-dated payments.

Date: The report only includes business received during the specified date.

Period from: The report only includes business received during the specified time period.

Report Options section

Exclude payments that did not clear: If selected, the report doesn't include insufficient funds payments.

6. In the **Select Report** section, click a report and then click **View**. The **Latitude Report Viewer** window appears.

MTDCollectionsByCust.rpt IsCustom=False FileDate=	:6/7/2005 12:00:00 AM - La	atitude Report V	/iewer				X
Customer 0000001 - CUSTOMER ON			y Customer	2005 to 4/4/20	13		Â
Apr 4, 2013 3:21PM	In-Hou	se	PDCs and Cre	edit Cards	Tota	1	
_	Collections	Fees	Collections	Fees	Collections	Fees	ш
0000001 CUSTOMER ONE	\$1,523.00	\$380.00	\$0.00	\$0.00	\$1,523.00	\$380.00	
	\$1,523.00	\$380.00	\$0.00	\$0.00	\$1,523.00	\$380.00	
							Ŧ
					-	•	
Current Page No.: 1	Total Page No.: 1			Zoom Fac	tor: Page Width		

- 7. To print the report, in the toolbar, click the Print icon. The **Print** dialog box appears.
- 8. Modify the settings as necessary and then click **Print**.

Note: For more information about using the **Latitude Report Viewer** window, see <u>Latitude</u> <u>Report Viewer</u>.

Generate a Performance Report for All Customers

Use the **Performance Reports** tab to configure and generate a performance report for all customers.

To generate a performance report for all customers

1. In the Latitude Statistics Console window, from the View menu, click Customers. The customer report options appear.

Latitude Statistics Console - [Custo	mers]	
圃 Actions View		_ 8 ×
View Order All Customers All Customers 0000000 - DEFAULT CUSTOME O000000 - CUSTOMER ONE 0000002 - CUSTOMER ONE O000000 - DEFAULT CUSTOME 0000002 - CUSTOMER TWO O000000 - CUSTOMER TWO 0000003 - POD CUSTOMER O000000 - CUSTOMER THREE 0000005 - DIALER TEST CUSTI O000000 - CUSTOMER TOMER 0000006 - CUSTOMER FOUR O000000 - SECOND CUSTOMER 0000001 - DISNEY CUSTOMER O000001 - DISNEY CUSTOMER 00000011 - ABC Customer	Batch Reports Performance Reports Selected Customer 0000000 - DEFAL Report Scope	JLT CUSTOMER Report Options ✓ Include all Customers in this Invoice Group Cumulative percentages on Stairstep ✓ Include PDCs for current month Rebuild Data Cancel Rebuild
	Select Report StairStep Report StairStep Report with Projected PDCs Batch Performance Batch Performance (Internal) Yield Analysis	View

- 2. In the **Selection** pane, click the **All Customers** folder.
- 3. Click the **Performance Reports** tab and then specify the report parameters.

Latitude Statistics Console - [Custo	mers]	
Actions View		_ & ×
View Order A Find Customer	Batch Reports Performance Reports Selected Customer All Customers Report Scope C Month of 4 2013 C Date 4 / 4 / 2013 • Period from 3 / 5 / 2005 to 4 / 4 / 2013 Select Report Select Report Select Report Customer Collections by Branch Desk Collector Commissions Collector Commissions By Customer	Report Options Exclude payments that did not clear Excludes payments that bounced in the next month and reversals of payments from the previous month. View

Report Scope section

Month of: The report includes all business received into Latitude during the specified month and year. If you specify the current month, the report includes post-dated payments.

Date: The report only includes business received during the specified date.

Period from: The report only includes business received during the specified time period.

4. In the **Select Report** section, click a report and then click **View**. The **Latitude Report Viewer** window appears.

In-House ction Fees 22.00 \$329. 50.00 \$62. 72.00 \$392.	Collections .75 \$0.00 .50 \$0.00	Credit Cards Fees 0 \$0.00 0 \$0.00		otal Fees \$329.75 \$62.50 \$39225]
ctions Fees 22.00 \$329. 50.00 \$62.	Collections .75 \$0.00 .50 \$0.00	Fees 0 \$0.00 0 \$0.00	Collections \$1,322.00 \$250.00	Fees \$329.75 \$62.50	-
22.00 \$329. 50.00 \$62.	75 \$0.00 50 \$0.00) \$0.00) \$0.00	\$1,322.00 \$250.00	\$329.75 \$62.50] -
50.00 \$62.	50 \$0.00	\$0.00	\$250.00	\$62.50	-
50.00 \$62.	50 \$0.00	\$0.00	\$250.00	\$62.50	-
					-
72.00 \$392.	25 \$0.00	0 \$0.00	\$1,572.00	\$39225	

- 5. To print the report, in the toolbar, click the Print icon. The **Print** dialog box appears.
- 6. Modify the settings as necessary and then click **Print**.

Note: For more information about using the **Latitude Report Viewer** window, see <u>Latitude Report</u> Viewer.

Custom Groups

Use the **Latitude Statistics Console** window to maintain custom groups and generate batch reports for the custom groups. You can use these reports to analyze combined performance for a group of customers.

The following batch reports are available in Statistics Console:

Stairstep Report: Displays aged placement and recovery analysis for the specified customers and time period.

Stairstep Report with Projected PDCs: Displays aged placement and recovery analysis for the specified customers and includes future recovery percentages based on post-dated entries.

Batch Performance: Displays a detailed analysis of placement batches for the specified customers by month. It includes gross and net amounts for placements and recovery percentages for collection amounts.

Batch Performance (Internal): Displays a detailed analysis of placement batches for the specified customers by month. It includes gross and net amounts for placements and recovery percentages for collection amounts with and without post-dated entries.

Yield Analysis: Displays average balances, fees, and collection amounts for the specified customers and time period.

Create a Custom Group

Use the **New Custom Group** dialog box to add a custom group for reporting purposes.

To create a custom group

1. In the Latitude Statistics Console window, from the View menu, click Custom Groups. The custom group report options appear.

Latitude Statistics Console - [Custo	m Groups]			
Actions View		_ & ×		
View Actions				
	Batch Reports			
Banks - O000001 - CUSTOMER ONE O000004 - CUSTOMER THF	Selected Customer(s)			
	Selected Customer			
🗄 💼 GROUP ONE - GROUP ONE	Banks -			
	Report Scope	Report Options		
	Show all months of placement	☑ Include all Customers in this Invoice Group		
	C Show past @ 12 C 18 C 24 months	Cumulative percentages on Stairstep		
	C Start with month: Mo 🚽 Year 🚽	✓ Include PDCs for current month		
		Rebuild Data		
		Rebuild Data Cancel Rebuild		
	Select Report			
	StairStep Report StairStep Report with Projected PDCs Batch Performance Batch Performance (Internal) Yield Analysis	View		
	·			

2. From the Actions menu, click New Custom Group. The New Custom Group dialog box appears.

New Custom Group
Custom Group's ID (30 Char)
Custom Group's Description (100 Char- Optional)
Cancel OK

- 3. In the **Custom Group's ID** box, type the custom group name, up to 30 characters.
- 4. (Optional) In the **Custom Group's Description** box, type a description of the custom group, up to 100 characters.

5. Click **OK**. Statistics Console adds the custom group to the **Selection** pane in the **Latitude Statistics Console** window.

Modify a Custom Group

Use the **Edit Custom Group** dialog box to modify a custom group that Statistics Console uses for reporting purposes.

To modify a custom group

1. In the Latitude Statistics Console window, from the View menu, click Custom Groups. The custom group report options appear.

Latitude Statistics Console - [Custo	m Groups]	
Actions View		_ & ×
View Actions		
All Customers	Batch Reports	
0000001 - CUSTOMER ONE	Selected Customer(s)	
⊡ Default Group - Default Group ⊡ Furniture Stores -	- Selected Customer	
🗄 💼 GROUP ONE - GROUP ONE	Ban	ks -
	Report Scope	Report Options
	Show all months of placement	☑ Include all Customers in this Invoice Group
	C Show past @ 12 C 18 C 24 months	Cumulative percentages on Stairstep
	C Start with month: Mo 💌 Year 💌	✓ Include PDCs for current month
		Rebuild Data
		Rebuild Data Cancel Rebuild
	Select Report	
	StairStep Report StairStep Report with Projected PDCs Batch Performance Batch Performance (Internal) Yield Analysis	View

2. In the **Selection** pane, right-click a custom group and then click **Edit**. The **Edit Custom Group** dialog box appears.

Edit Custom Group (Banks)			×
Custom Group's ID (30 Char) Banks Custom Group's Description (100 Cl	har- Optional)		
Cancel		Save	

3. Modify the information as necessary and then click **OK**.

Delete a Custom Group

Use the **Latitude Statistics Console** window to delete a custom group that Statistics Console uses for reporting purposes.

To delete a custom group

1. In the Latitude Statistics Console window, from the View menu, click Custom Groups. The custom group report options appear.

Latitude Statistics Console - [Custo	m Groups]	
個 Actions View		_ & ×
View Actions		
	Batch Reports	
Banks - O000001 - CUSTOMER ONE O000004 - CUSTOMER THF Default Group - Default Group	Selected Customer(s)	
⊕, Furniture Stores - ⊕, GROUP ONE - GROUP ONE	Bank	(5 -
	Report Scope	Report Options
	Show all months of placement	☑ Include all Customers in this Invoice Group
	C Show past @ 12 C 18 C 24 months	Cumulative percentages on Stairstep
	C Start with month: Mo 🖵 Year 🖵	✓ Include PDCs for current month
		Rebuild Data
		Rebuild Data Cancel Rebuild
	Select Report StairStep Report StairStep Report with Projected PDCs Batch Performance Batch Performance (Internal) Yield Analysis	View

2. In the **Selection** pane, right-click a custom group and then click **Delete Group**. The **Delete Custom Group** dialog box appears.

Delete Custom Group	×
Are you sure you want to delete Tem (This will not delete the group's Cust	
Yes No	Cancel

3. Click Yes. Statistics Console deletes the custom group from the Selection pane in the Latitude Statistics Console window. Statistics Console doesn't delete the customers.

Add a Customer to a Custom Group

Use the Latitude Statistics Console window to add a customer to a custom group.

To add a customer to a custom group

1. In the Latitude Statistics Console window, from the View menu, click Custom Groups. The custom group report options appear.

Latitude Statistics Console - [Custor	m Groups]			
Actions View		_ & ×		
View Actions				
All Customers	Batch Reports			
CONCOLLAGE CONCOLLAGE	Selected Customer(s)			
	Banks -			
	Report Scope Image: Show all months of placement Image: Show past Image: Show	Report Options ✓ Include all Customers in this Invoice Group Cumulative percentages on Stairstep ✓ Include PDCs for current month		
		Rebuild Data Cancel Rebuild		
	Select Report StairStep Report StairStep Report with Projected PDCs Batch Performance Batch Performance (Internal) Yield Analysis	View		

2. In the **Selection** pane, click **All Customers**. The list of customers appears on the **Batch Reports** tab.

iew Actions				
All Customers Banks - O000001 - CUSTOMER ONE O000004 - CUSTOMER THF	0000000	Customer Name DEFAULT CUSTOMER	Class of Business 00000 - GENERAL CLASS OF B	
Conservation of the second secon	0000002 0000003 0000004 0000005 0000006 0000007 0000007 0000008 0000009 0000009	CUSTOMER ONE CUSTOMER TWO POD CUSTOMER CUSTOMER THREE DIALER TEST CUSTOMER CUSTOMER FOUR FIRST CUSTOMER SECOND CUSTOMER THIRD CUSTOMER DISNEY CUSTOMER ABC Customer	00000 - GENERAL CLASS OF B 00000 - GENERAL CLASS OF B 00001 - Credit Cards	

3. Click a customer code and drag and drop it onto a custom group folder.

Delete a Customer from a Custom Group

Use the Latitude Statistics Console window to delete a customer from a custom group.

To delete a customer from a custom group

1. In the Latitude Statistics Console window, from the View menu, click Custom Groups. The custom group report options appear.

Latitude Statistics Console - [Custo	m Groups]	
Actions View		_ & ×
View Actions All Customers Banks -	Batch Reports	
O000001 - CUSTOMER ONE O000004 - CUSTOMER THF O= Default Group - Default Group Furniture Stores -	Selected Customer(s)	
⊕- 💼 GROUP ONE - GROUP ONE	Report Scope	Report Options
	C Show past © 12 C 18 C 24 months C Start with month: Mo ▼ Year ▼	Cumulative percentages on Stairstep Include PDCs for current month
		Rebuild Data Rebuild Data Cancel Rebuild
	Select Report StairStep Report StairStep Report with Projected PDCs Batch Performance Batch Performance (Internal) Yield Analysis	View

2. In the **Selection** pane, right-click a customer and then click **Remove Customer**. Statistics Console deletes the customer from the group.

Generate a Batch Report for a Custom Group

Use the **Batch Reports** tab to configure and generate a batch report for a custom group.

To generate a batch report for a custom group

1. In the Latitude Statistics Console window, from the View menu, click Custom Groups. The custom group report options appear.

Latitude Statistics Console - [Custor	m Groups]	
Actions View		_ & ×
View Actions All Customers Sanks - O000001 - CUSTOMER ONE O000004 - CUSTOMER THF Official Group - Default Group Furniture Stores - GROUP ONE - GROUP ONE	Batch Reports Selected Customer(s) Selected Customer Ban	(5 .
	Report Scope Show all months of placement Show past Show past <td>Report Options ✓ Include all Customers in this Invoice Group Cumulative percentages on Stairstep ✓ Include PDCs for current month Rebuild Data Cancel Rebuild</td>	Report Options ✓ Include all Customers in this Invoice Group Cumulative percentages on Stairstep ✓ Include PDCs for current month Rebuild Data Cancel Rebuild
	Select Report StairStep Report StairStep Report with Projected PDCs Batch Performance Batch Performance (Internal) Yield Analysis	View

- 2. To include inactive customers in the list, click View and then click View Inactive Customers.
- 3. Specify the report parameters.

Report Scope section

Show all months of placement: The report includes all business ever received into Latitude.

Show past: The report only includes business received during the specified number of past months.

Start with month: The report only includes business received from the specified date forward.

Report Options section

Include all Customers in this Invoice Group: If selected, the report includes all customers in the invoice group. This option is available for parent customers only.

Cumulative percentages on Stairstep: If selected, collection percentages increase cumulatively, meaning the last month of collection shows the total collection percent. If cleared, collection percentages are for the month indicated only.

Include PDCs for current month: If selected, the report includes post-dated checks for the current month.

4. In the **Rebuild Data** section, click **Rebuild Data**. Statistics Console applies the report parameters.

5. In the **Select Report** section, click a report and then click **View**. The **Latitude Report Viewer** window appears.

Note: If you chose to include all customers in the invoice group or you chose a custom group, the **Stairstep Title** dialog box appears. Type a title for the report and then click **OK**.

🛃 Bat	tch Perforr	mance -	Latitude Repor	rt Viewer					X
	3 K		▶ ▶ 1	/1 🞢	# •				
					7800 BELI SI JACKSON	atitude FORTPARKWAY JITE 100 VILLE, FL 32256 00 866-396-2599			E
		Bar Batch	1ks h Performance	Report			Report Date : A	pr 5, 2013	
	Month	Year	Number	Placements - Gross Amount	Net Amount	This Month	ts Collected To Date	Recovery % *	
		2011	8	\$16,660.00	\$16,660.00	\$0.00	\$0.00	0.00	
		2011	3	\$2,900.00	\$2,900.00	\$0.00	\$250.00	8.62	
		2011	21	\$36,095.57	\$36,095.57	\$0.00	\$0.00	0.00	
	Sep		125	\$200,684,76	\$200,684,76	\$0.00	\$120.00	0.06	
	Oct	2011	28	\$25,350.00	\$25,350.00	\$0.00	\$0.00	0.00	
	Summ	nary	185	\$281,690.33	\$281,690.33	\$0.00	\$370.00	0.13	Ŧ
•						III			•
Currer	nt Page No	o.: 1			Total Page No.: 1		Zoom Factor: Page W	idth	

- 6. To print the report, in the toolbar, click the Print icon. The **Print** dialog box appears.
- 7. Modify the settings as necessary and then click **Print**.

Note: For more information about using the **Latitude Report Viewer** window, see <u>Latitude</u> Report Viewer.

Customer Search

Use the **Simple Search** tab in the **Latitude Search - Search for Customer** window to search for and select a customer for whom to generate a batch or performance report.

Search for a Customer

Use the **Simple Search** tab in the **Latitude Search - Search for Customer** window to search for a customer for whom to generate a batch or performance report. You can search using any combination of search criteria. In some cases, you can search phonetically or using a wildcard.

To search for a customer

1. In the Latitude Statistics Console window, from the View menu, click Customers. The customer report options appear.

I Latitude Statistics Console - [Custor	mers]	
個 Actions View		_ & ×
View Order M Find Customer All Customers 0000000 - DEFAULT CUSTOME O000000 - CUSTOMER ONE 0000002 - CUSTOMER TWO O0000000 - DEFAULT CUSTOMER 0000003 - PDD CUSTOMER TWO O0000000 - DEFAULT CUSTOMER 0000003 - PDD CUSTOMER THREE O0000000 - DEFAULT CUSTOMER 00000005 - DIALER TEST CUSTI O000000 - CUSTOMER THREE 00000006 - CUSTOMER FOUR O000000 - DIALER TEST CUSTOMER 00000007 - FIRST CUSTOMER O000000 - DISNEY CUSTOMER 00000011 - ABC Customer	 Show all months of placement Show past © 12 C 18 C 24 months Start with month: Mo Vear Vear 	CUSTOMER Report Options ✓ Include all Customers in this Invoice Group Cumulative percentages on Stairstep ✓ Include PDCs for current month Rebuild Data Rebuild Data Cancel Rebuild
	Select Report StairStep Report with Projected PDCs Batch Performance Batch Performance (Internal) Yield Analysis	View

2. In the toolbar, click Find Customer. The Latitude Search - Search for Customer window appears.

😅 Latitude Search - Search for Customer	X
Simple Search Results	For help with wild card searching, <u>click here</u> .
Customer Code:	
Customer Name:	
Customer Group: No items selected.	<u>_</u>
Alpha Code:	
Contact Name:	
Maximum results: 250	Clear Search

3. On the **Simple Search** tab, type search criteria into one or more boxes.

Tip: For fewer results, provide more information. For more results, provide less information.

4. To search for a customer group, do the following:

a. Click the sicon at the end of the **Customer Group** box. The **Select Customer Group** dialog box appears, which lists all customer groups.

🔍 Select Custor	mer Group			
Find:		• 🗞	🗞 🤝	
Name	Description			
Banks				
Default Group	Default Group			
Furniture Stores	3			
GROUP ONE	GROUP ONE			
I				
Group:				Open
				Cancel

b. To search from the beginning of the list, in the **Find** box, type your search criteria and click the ^{SD} icon.

c. To search forward in the list, select a customer in the list, in the **Find** box, type your search criteria, and then click the ^{So} icon.

d. To search backward in the list, select a customer in the list, in the **Find** box, type your search criteria, and then click the 🛸 icon.

e. Click the customer groups to include in your search.

Tip: To select multiple sequential customer groups, press and hold the **Shift** key and click the first and last sequential customer group. To select multiple non-sequential customer groups, press and hold the **Ctrl** key and click each individual customer group.

- f. Click **Open**. The **Select Customer Group** dialog box closes and the number of selected customer groups displays in the **Customer Group** box on the **Simple Search** tab.
- 5. Click **Search**. The results display on the **Search Results** tab.

(🍏 Latitude Sea	rch - Search for Cu	istomer					x
Simple Search Results								
l	Customer Code	Customer Name	Alpha Code	Company Name	Contact Name	Address	City	State
l	0000001	CUSTOMER ONE			MATT	123 MAIN STREET	JACKSONVILLE	FL
l	0000002	CUSTOMER TWO			TOM SMITH	333 MAIN STREET	JACKSONVILLE	FL
l	0000004	CUSTOMER THREE			JACK	123 MAIN STREET	JACKSONVILLE	FL
l	0000006	CUSTOMER FOUR			MATT	123 MAIN STREET	JACKSONVILLE	FL
<								Þ
	Maximum result	ts: 250	3	Search com	plete, 4 results	returned. Ba	ck Sel	ect

- 6. To limit the maximum number of results that display, in the **Maximum results** box, type the maximum number or use the arrows to increase or decrease the number. The lower the number, the less it affects system performance.
- 7. To sort the results, click a column heading. The first time you click a column heading, the results sort in ascending order. The second time you click it, the results sort in descending order.
- 8. To select a customer, do one of the following:
- 9. Double-click the customer.
- 10. Click the customer and then click **Select**. The customer name appears in the **Selected Customer** section of the **Latitude Statistics Console** window.

Wildcard Search

Use wildcard search to search on a partial customer or contact name when you don't know the precise spelling. The search results include all records that match the specified characters. For example, "SMITH" returns "SMITH" and "SMITHERS."

You can use the following characters in a wildcard search:

% (percent sign): Represents multiple characters. For example, SM% returns all names that begin with "SM."

_ (underscore): Represents a single character. For example, SM_LE returns all names that are five characters in length, begin with "SM," and end with "LE" (such as SMILE, SMULE, SMALE).

Phonetic Search

Phonetic searching uses an algorithm to break the name into a phonetic key based on the consonants. Phonetic matching allows you to locate a name when you don't know the exact spelling or the spelling varies. For example, doing a phonetic search on "John" locates the names "John" and "Jon." The search doesn't find partial phonetic keys. For example, searching on "John" does not find "Johnny."

Note: For phonetic searching to work, in the **Link Console** program, set **Link Mode** to "Do Not Link" and ensure that the Link service is running.

Production Reports

The following production reports are available in Statistics Console:

Promise Report: Displays promise information grouped by desk or customer for the specified time period and branch.

PDC Report: Displays post-dated check information grouped by desk or customer for the specified time period and branch.

Credit Card Report: Displays pending credit card information grouped by desk or customer for the specified time period and branch.

Generate a Production Report

Use the **Batch Reports** tab to configure and generate a production report.

To generate a production report

1. In the Latitude Statistics Console window, from the View menu, click Production Report. The production report options appear.

Latitude Statistics Console - [Production Re	eports]
5: Actions View	_ & ×
Actions view Promise Report PDC Report Credit Card Rpt.	Promise Report Report Subtitle (Optional) Select All Items Items entered on 4/4/2013 C Items entered between 4/1/2013 and 4/4/2013 Items entered between 4/1/2013 and 4/30/2013 Items entered between 4/4/2013 and 4/30/2013 Items entered between A/4/2013 and 4/30/2013 Items entered between Items entered between

- 2. In the **Selection** pane, click a report.
- 3. Specify the report parameters.

Report Subtitle: Optional subtitle for the report.

Select section

All items: The report includes all promises, PDC payments, or credit card payments in Latitude.

Items entered on: The report only includes promises, PDC payments, or credit card payments added on the specified date.

Items entered since: The report only includes promises, PDC payments, or credit card payments added after the specified date.

Items entered between: The report only includes promises, PDC payments, or credit card payments added between the specified dates.

That are due between: The report only includes promises, PDC payments, or credit card payments due between the specified dates.

For Desks in Branch: The report only includes the specified branches.

Grouping section

Group by Desk: If selected, Statistics Console groups the promises, PDC payments, or credit card payments by desk.

Group by Customer: If selected, Statistics Console groups the promises, PDC payments, or credit card payments by customer.

Order By section

Account ID: If selected, Statistics Console sorts the report by account ID.

Amount: If selected, Statistics Console sorts the report by promise, PDC payment, or credit card payment amount.

Descending order: If selected, Statistics Console sorts the report in descending order. If cleared, Statistics Console sorts the report in ascending order.

4. Click **View Report**. The **Latitude Report Viewer** window appears.

Promise Report - Latitude Rep	ort Viewer							x
🔮 🍊 (н. ч.) н. (1	/2 🕅 🞢 ▪						
Promise Rep For Promises All Branches	All existing i Due between	tems 1 4/4/2013 and 4/3	0/2013			April 4, 2013	3:54 PM	ш •
Entered	Acct ID	Times Contacted	Current Bal	Promise Amt	Due Date	ApprovedBy:D	ueDatsuspended	
Desk 00000		Thirds Contacted	<u>Current Dar</u>	Promise Ant	Due Date	Approvedby D	del Jaibuspended	
12/14/2012	1004	1	\$2,267.42	\$200.00	4/15/2013	ADMIN		
12/14/2012	1010	0	\$965.55	\$100.00	4/15/2013	ADMIN		
12/17/2012	1011	0	\$908.56	\$108.56	4/17/2013	ADMIN		
			Total	\$408.56	\$136.19		3.56 Median	
				,				+
Current Page No.: 1		Total Pa			Zoom	Factor: Page Width		_

- 5. To print the report, in the toolbar, click the Print icon. The **Print** dialog box appears.
- 6. Modify the settings as necessary and then click **Print**.

Note: For more information about using the **Latitude Report Viewer** window, see <u>Latitude</u> <u>Report Viewer</u>.