

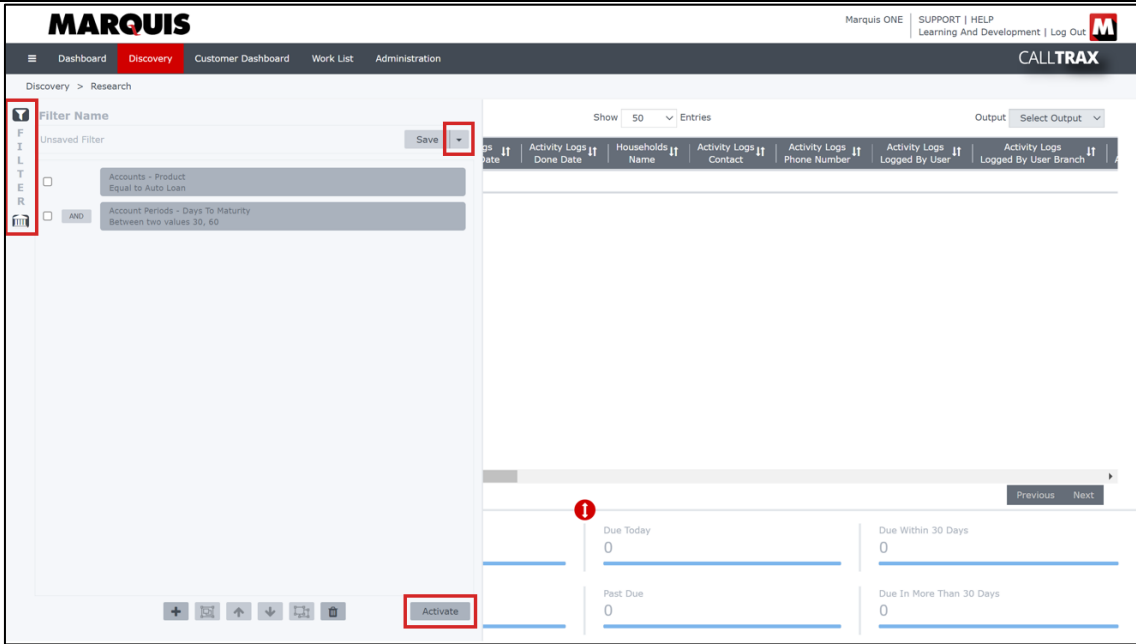


CLTX212	CallTrax NEXT Bulk Log – Create
	The following procedures will guide through generating multiple logs at once using the Bulk Log – Create tool within the Discovery tool.
Order of Steps	Tasks
Step 1	Log into CallTrax NEXT
Step 2	On the landing page, click Discovery from the main menu
Step 3	Click Research
Step 4	The filter window should be extended. If it isn't, click the Filter  icon to extend it
Step 5	Use the  or the Fast Filter icon to create a filter.
Note: For a refresher on the steps for building filters, please review 3 Step Filter and Fast Filter procedure documents located within the Help Resources.	
Step 6	To apply the filter, click Activate
	
Step 7	Click Open in the upper left corner of the grid to select the appropriate Field Group
Note: The Field Group will be used to identify what bulk log actions will be available as well as whether the logs will be created at the Household or Member level.	
	<ul style="list-style-type: none"> Household Listing Report – this field group will create a log for each qualifying household Customer Listing Report – this field group will create a log for each qualifying member
7.1	Click the desired field group within the list

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Open Field Group

Name	Fields
Account Listing Report	Customer - Name, Accounts - Address Line 1, Accounts - City, Accounts - State, Accounts - Zip Cod...
CallTrax Activity Logs Default	Activity Logs - Status, Activity Logs - Activity Log Type, Activity Logs - Subject, Activity Logs - Due ...
CallTrax Work List	Activity Logs - Status, Activity Logs - Activity Log Type, Activity Logs - Subject, Activity Logs - Due ...
Commercial Lending Pipeline	Activity Logs - Logged Date, Activity Logs - Status, Activity Logs - Household Name, Activity Logs - ...
Consumer Lending Pipeline	Activity Logs - Logged Date, Activity Logs - Status, Activity Logs - Household Name, Activity Logs - ...
Contact Listing Report	Contacts - Name, Contacts - Address Line 1, Contacts - City, Contacts - Zip, Contacts - Phone 1, Co...
Fast Facts	
Home Mortgage Pipeline	Activity Logs - Logged Date, Activity Logs - Status, Activity Logs - Household Name, Activity Logs - ...
Household Listing Report	Households - Name, Household Periods - Address Line 1, Household Periods - City, Household Perio...
Customer Listing Report	Customer - Name, Customer Periods - Address Line 1, Customer Periods - City, Customer Periods - ...
Learning and Development Pipeline	Activity Logs - Logged Date, Activity Logs - Status, Activity Logs - Household Name, Activity Logs - ...
Log Entry Listing Report	Activity Logs - Due Date, Activity Logs - Logged Date, Activity Logs - Processing Date, Activity Logs ...
Pipeline Log Activity Default	Activity Logs - Due Date, Activity Logs - Processing Date, Activity Logs - Done Date, Activity Logs - ...

Note: The number of entries will now reflect the number of household or customer records that meet the filter condition. This should will be the number of logs generated.

Step 8 Click the **Output** drop-down arrow

Step 9 Click **Bulk Logs - Create**

Customer Listing Report

Customer Name	Customer Periods Address Line 1	Customer Periods City	Customer Periods State	Customer Periods Zip Code	Customer Phone Number	Customer Periods Number of Deposits	Customer Periods Number of Loans
Abbie Jaden Bauch	532 Courtright Ct	Pickerington	Ohio	43147	614.555.2392	1	
Abbie Johathan Roob	5550 Knollwood Dr	Columbus	Ohio	43232	614.555.6838	7	
Adeline Omari Qultzon	1930 S Ridgewood Ave Lot 21	South Daytona	Florida	32119	614.555.1340	2	
Aditya Scarlett Marvin	Po Box 799	Frisco	Colorado	80443	330.555.5457	1	1
Ahmed Eldora Turcotte	3574 Nightspring Ct	Hilliard	Ohio	43026	614.555.8400	2	1
Akeem Zechariah Hauck Sr	147 Sassafrass Pl	Johnstown	Ohio	43031	614.555.6773	3	10
Alana Vicenta Effertz PhD	3384 Western Hill Rd	Columbus	Ohio	43223	614.555.7258	2	2
Alberta Johnathon Krajcik	3367 River Landings Blvd	Hilliard	Ohio	43026	614.555.1152	2	11
Alberto Humberto Littel V	2521 Brentwood Lake Dr	Reynoldsburg	Ohio	43068	614.555.8136	3	3
Aleen Joyce Altenwerth	3508 Sand Hill Rd Sw	Lancaster	Ohio	43130	740.555.8833	1	1
Alene Tyrique Baumbach	3952 Migration Ln	Columbus	Ohio	43230	614.555.1484	5	7
Alfred Golden Windler	5585 Cherrywood Rd	Columbus	Ohio	43229	614.555.7611	4	5
Alva Cathrine Rosenbaum	5494 Chatford Sq	Columbus	Ohio	43232	614.555.1614	3	4
Amanda Jaunita Bergnaum	61 Glengary Ct	Pickerington	Ohio	43147	555.1202	3	12

Step 10 Click the drop-down arrow and select the desired **Activity Log Type**

Step 11 Click **OK**

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| Step 12 | Click on the desired Status |
| Step 13 | Click in the date box to enter or select the desired date from the calendar |
| Step 14 | Use the drop-down arrows to modify the default Logged By and Assigned By selections, if desired |
| Step 15 | Click the drop-down arrow for Assigned For |
| Step 16 | Choose the appropriate officer to make responsible for the log activity |
| | <ul style="list-style-type: none"> • Assigned Manager: Based on the assigned key account for the relationship • Deposit Officer: Based on the first opened Deposit account in the relationship • Loan Officer: Based on the first opened Loan account in the relationship • Groups: Officer groups built within Administrator/Officer Groups • User: Individual user that will be assigned for all logs |
| Step 17 | Use the Assigned For Branch drop-down arrow to modify the default branch selection, if desired |
| Note: If a group or default officer is selected, the branch will auto-populate based on the CallTrax NEXT default branch assigned to the officer that becomes assigned. | |
| Step 18 | Use the drop-down arrow to select the Product and Account Type , or Service |
| Step 19 | Enter the desired Subject for the log |
| Step 20 | Enter the desired comment into the bottom Comments box |
| 20.1 | Click Add |

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- Step 21** To attach a document, click the **Documents** tab
- 21.1 Click the green **Add New** button
- 21.2 Enter a **description** for the document
- 21.3 Click **Choose File** and browse for the desired document
- 21.4 With a description and file selected, click **Add**

- Step 22** Once all desired selections are made, click **Save** to create the logs
- A green **Success** status pop up will display providing the number of logs created