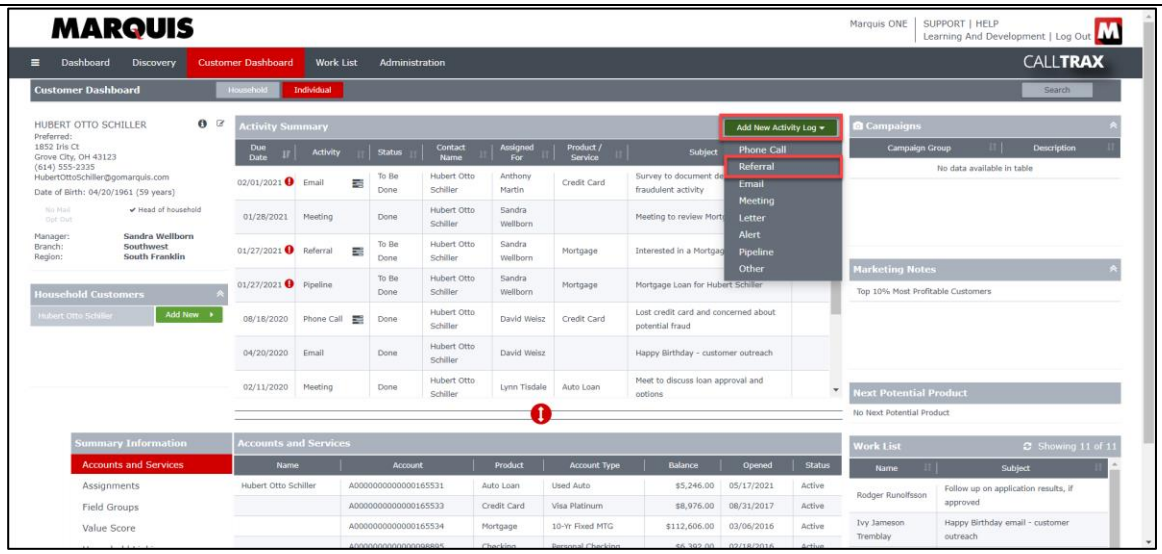
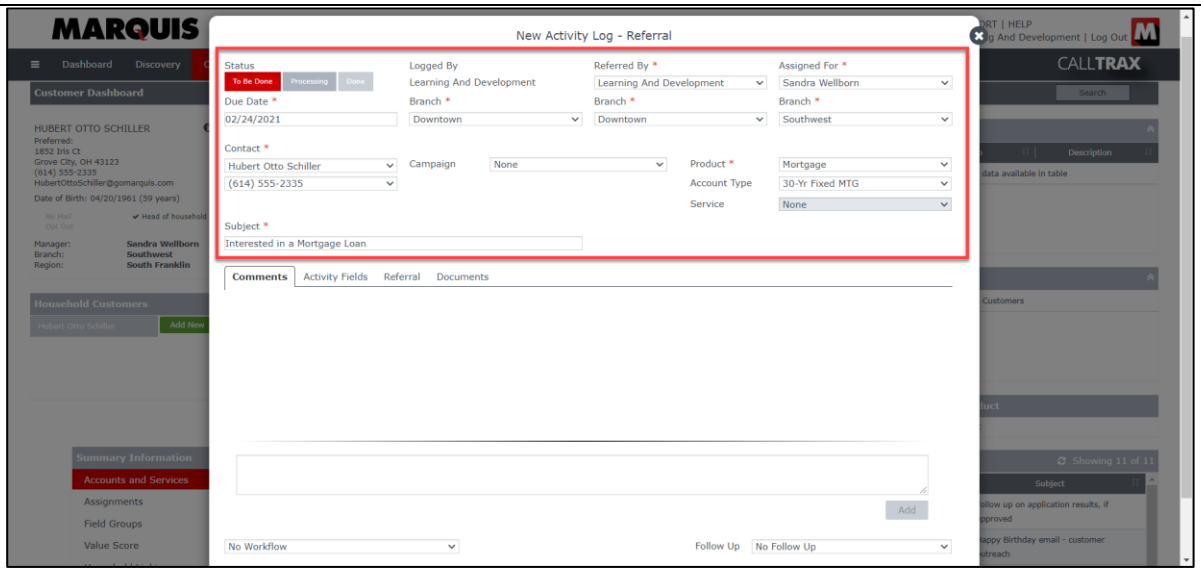
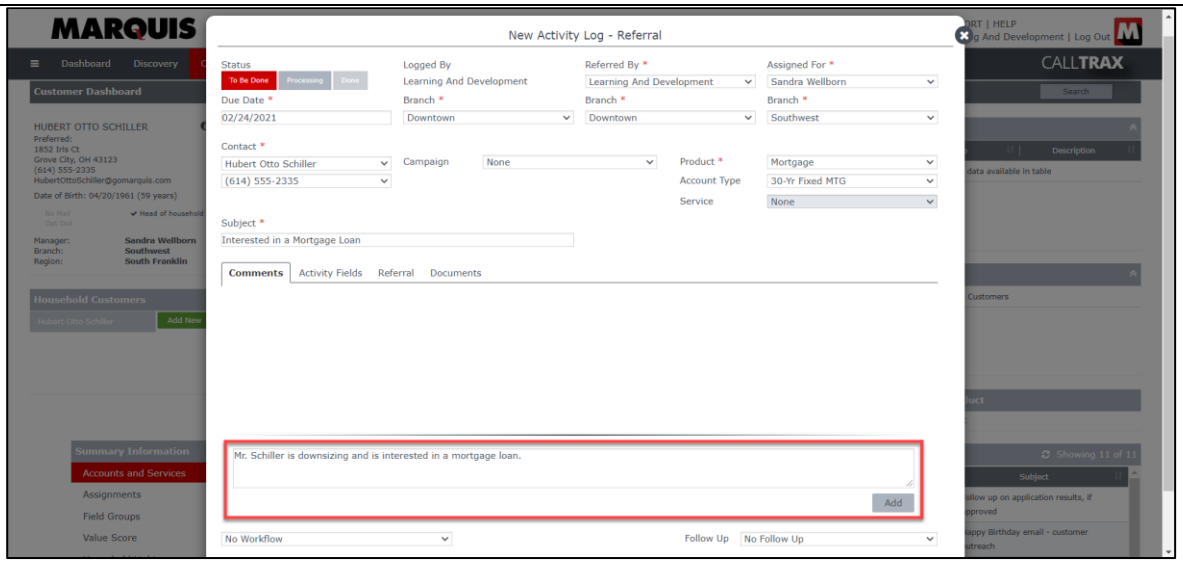
MARQUIS

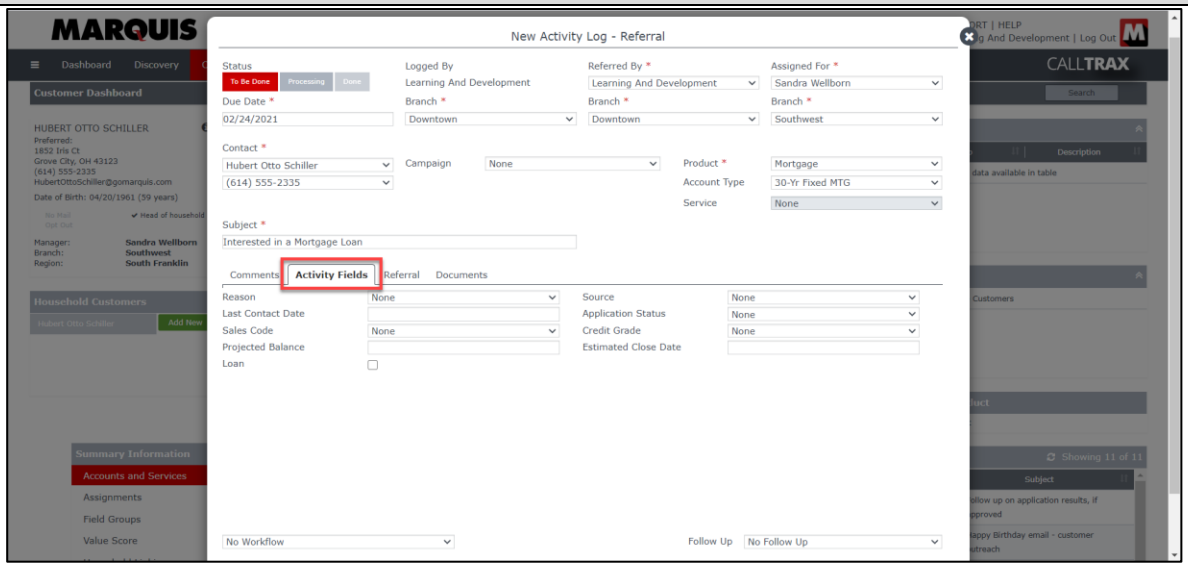
CLTX306	CallTrax NEXT Creating Referral Activity Logs
	The following procedures will guide through the process of creating a new Pipeline Activity Log within CallTrax NEXT.
Order of Steps	**Tasks**
Step 1	Log into **CallTrax NEXT.**
Step 2	On the landing page, click on **Customer Dashboard** from the main menu
Step 3	Locate the customer within the **Search** box
Note: Using more than one of the available search components will assist in better matching to the desired record.	
Step 4	To create a new Referral Activity Log, click the **Add New Activity Log** button
Step 5	Click on **Referral** in the list
	
Step 6	Fill in the necessary fields for the Activity Log
Note: Any fields containing an asterisks next to them are required and must contain a selection in order for the log to be saved.	
6.1	Select the desired **Status** by clicking on the appropriate button
	• To Be Done: Activity has not been worked on
	• Processing: Activity is currently being worked on
	• Done: Activity has been completed and no further work is needed on it
6.2	Establish the appropriate date by clicking in the Date box
Note: The name of the date field will be based on the Status that is selected: Due Date will display when Status is on To Be Done, Processing will display when status is on Processing and Done Date will display when the status is on Done.	
6.3	Type in the desired date within the box using the MM/DD/YYYY format OR
6.4	Click on a day within the calendar box
	• Use the right and left arrows to navigate back or forward by the month
6.5	Select the Referred By Officer by clicking the drop-down arrow and select a user from a list
6.6	Select the Referred by Branch by clicking the drop-down arrow and select a branch from a list

Note: The Assigned By Officer and Branch will be auto-populated but can be changed. When selecting an officer, if a default branch is assigned to that officer, the Branch field will auto-populate. Optionally, those selections can be changed, if desired.	
6.7	Select the Assigned For Officer by clicking the drop-down arrow and select a user from a list
6.8	Select the Assigned For Branch by clicking the drop-down arrow and select a branch from a list
6.9	The Contact fields will autofill based on the selected individual. Click the drop-down arrow to select a different contact from a list.
6.10	Phone number is auto-populated under the contact. Click the drop-down arrow to select a different phone number from a list.
6.11	To add a new phone number, click the drop-down arrow in the phone number box
	• Click the **Add New >** option
	• Type in the new number and click the check mark
6.12	Select a Campaign, if desired, by clicking the drop-down arrow and selecting from a list
Note: A campaign represents a marketing offer, either email or print, that a customer received from the institution and can be tied to an activity to show the response to that marketing effort.	
6.13	Select the Product, Account Type or Service to the log by clicking the appropriate drop-down arrow and selecting an item from a list
Note: An Account Type list will not be available until a Product is first selected. If a product is selected, the Service drop-down will be disabled and if a Service is selected, the Product/Account Type drop-downs will be disabled.	
6.14	Type a subject into the Subject box identifying what the activity pertains to
	
Step 7	To add a Comment, click on the **Comments** tab
7.1	Type into the box located at the bottom of the Comments tab
7.2	Once desired content is typed, click the Add button
	Repeat for each desired comment



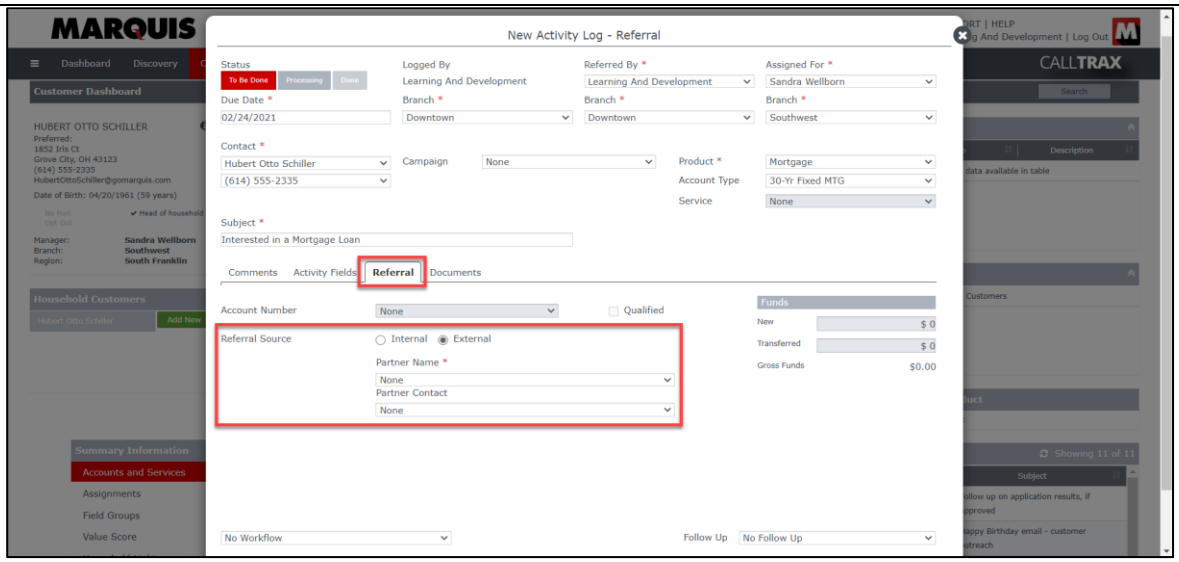
Step 8	To make Activity Field selections, click on the **Activity Fields** tab
8.1	Apply the appropriate steps for populating the necessary fields

Note: The Activity Fields tab is customizable and unique to each institution. Any field that contains an asterisks next to it is required to have a selection in order to save the log.

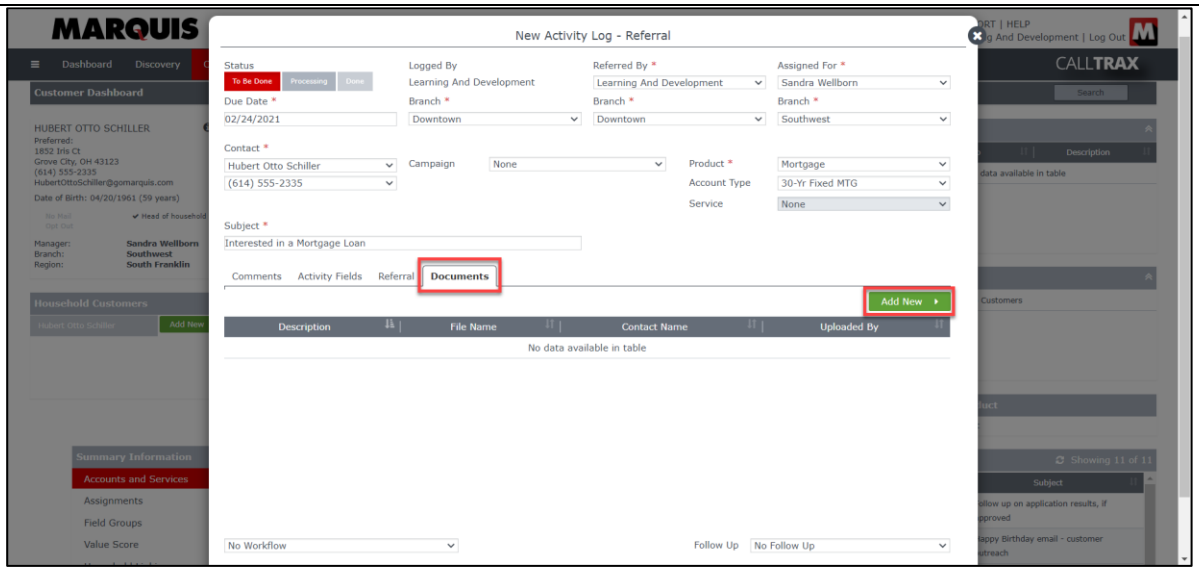


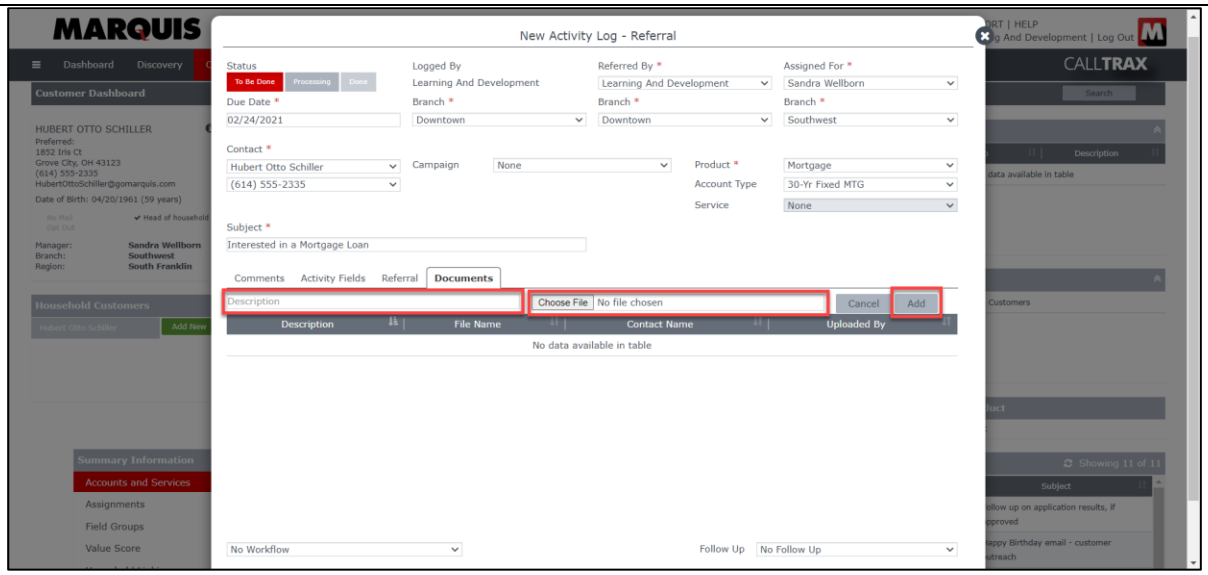
Step 9	Fill in the Referral fields by clicking on the **Referral** tab
9.1	Select the Referral Source by clicking on the radio dial next to the desired source
	• Internal: The referral came from within the institution
	• External: The referral came from another organization such as a dealership or mortgage company
9.2	○ When selecting external, click the drop-down arrow that appears to select a Partner from a list

Note: The other fields within Referral will be disabled until the activity log is being updated to the Done status.



Step 10	To attach a document to the log, click on the **Documents** tab
10.1	Click the green Add New button within the Documents tab
10.2	Type a description into the Description box to identify what information the document will provide
10.3	Click the Choose File button
10.4	Browse out to the document to be attached to the log
10.5	Select the file to be attached
10.6	Once the Description and the file is selected, click the gray **Add** button

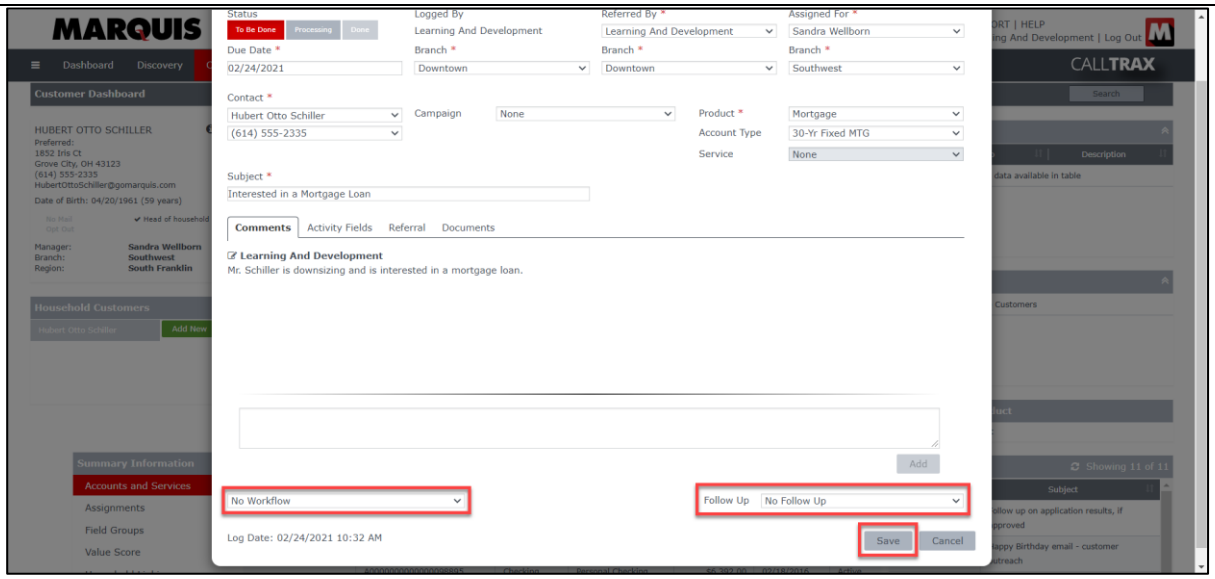




Step 11	To attach a WorkFlow, click the drop-down arrow next to No Workflow and select one from a list.
Step 12	To automatically create a Follow Up log, click the drop-down arrow next to the Follow Up field and select an Activity Log Type from the list

Note: A Workflow is an automated process for a path of activities necessary for certain processes within an organization. It is designed to keep the process flowing automatically until its completion. The Follow Up will create one activity log at the saving of the original log that will require information to be filled out by the user. It is not automated, nor does it follow a path.

Step 13	Once all selections are made, Click the **Save** button



	The Activity Log will appear within the Customer Dashboard immediately upon clicking Save