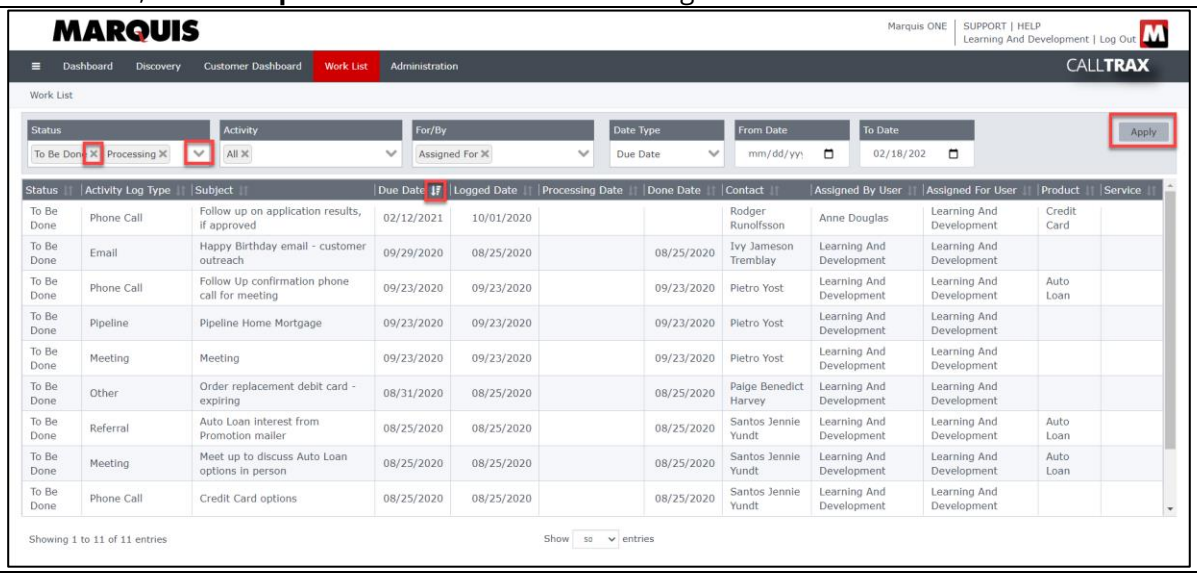
MARQUIS

CLTX401	CallTrax NEXT Managing Your Work List
	The following procedures will guide through configuring and generating your Work List within CallTrax NEXT.
Order of Steps	**Tasks**
Step 1	Log into **CallTrax NEXT.**
Step 2	On the landing page, click on **Work List** from the main menu.
Note: The filter selection will contain default selections but can be configured to meet the needs of each user.	
Step 3	The following **filter** fields can be configured, as desired:
3.1	• Status: Select the status of the logs desired to display in the Work List
	○ Click the **drop-down arrow** to add a Status to the filter
	○ Click the **X** next to a selected Status to remove it
3.2	• Activity: Select the Activity Log Type(s) desired to display in the Work List
	○ Click the **drop-down arrow** to add a specific Activity Log Type(s) to the filter
	○ Click the **X** next to a selected Activity Log Type to remove it
3.3	• For/By: Select either Assigned For or Assigned By for the activity logs to display in the Work List
	○ Click the **drop-down arrow** to choose the desired selection
	○ Click the **X** next to the item selected to remove it
3.4	• Date Type: Select which date field to apply the filter date range to
	○ Click the **drop-down arrow** to add a Date Type to the filter
	○ Click the **X** next to a selected Date Type to remove it
3.5	• From Date: Click in the box to type in the **Start date** or select a date from the Calendar box
3.6	• To Date: Click in the box to type in the **End date** or select a date from the Calendar box
Step 4	Click the **Apply** button to apply any filter changes made
Step 5	To sort the list, click the **up/down arrows** located in the right corner of the desired field header
	
Step 6	To **view** the full activity log, click on it within the list
	The user will be taken to that customer relationship with the log pulled up in full view