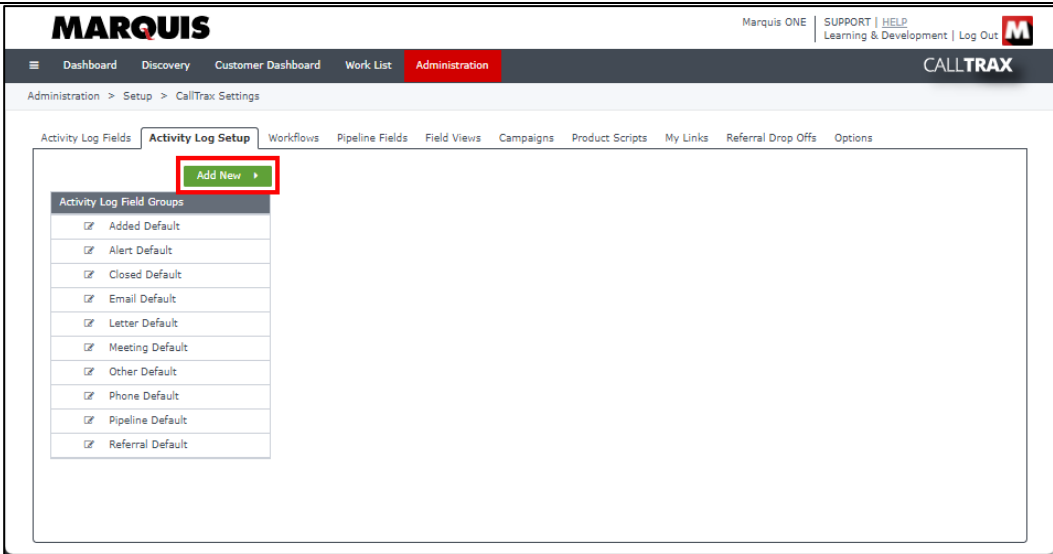
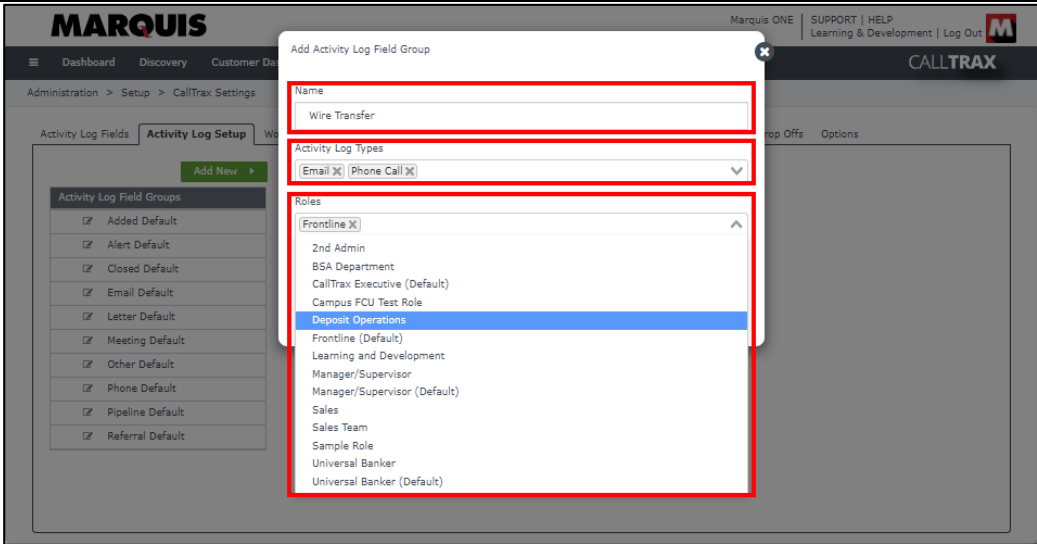


CLTX509	CallTrax NEXT Activity Log Setup Management
	The following procedure will guide you through assigning Activity Log Fields to the desired Activity Log Types for each role within CallTrax NEXT.
Order of Steps	Tasks
Step 1	Log into CallTrax NEXT
Step 2	On the landing page, click Administration from the main menu
Step 3	Hover the mouse over Setup , and click CallTrax Settings
Step 4	Click the Activity Log Setup tab
Step 5	Activity Log Fields have been organized into groups. To create a new group, click the green Add New button
	 <p>The screenshot shows the Marquis CallTrax NEXT interface. The top navigation bar includes 'Dashboard', 'Discovery', 'Customer Dashboard', 'Work List', and 'Administration'. The 'Administration' menu is expanded, showing 'Setup' and 'CallTrax Settings'. The 'CallTrax Settings' page has tabs for 'Activity Log Fields', 'Activity Log Setup', 'Workflows', 'Pipeline Fields', 'Field Views', 'Campaigns', 'Product Scripts', 'My Links', 'Referral Drop Offs', and 'Options'. The 'Activity Log Setup' tab is active, displaying a list of 'Activity Log Field Groups' with checkboxes for 'Added Default', 'Alert Default', 'Closed Default', 'Email Default', 'Letter Default', 'Meeting Default', 'Other Default', 'Phone Default', 'Pipeline Default', and 'Referral Default'. A green 'Add New' button is highlighted with a red box.</p>
Step 6	Type a name for the new group
Step 7	Click one or multiple Activity Log Types to make this Activity Log Field Group accessible to them
Step 8	Click one or multiple Roles to make this Activity Log Field Group accessible to them
	 <p>The screenshot shows the 'Add Activity Log Field Group' modal in the Marquis CallTrax NEXT interface. The modal has three main sections: 'Name', 'Activity Log Types', and 'Roles'. The 'Name' section contains a text input field with 'Wire Transfer' entered. The 'Activity Log Types' section has a dropdown menu with 'Email X' and 'Phone Call X' selected. The 'Roles' section has a list of roles, with 'Frontline X' selected. The modal is overlaid on the 'Activity Log Setup' page, which is visible in the background.</p>

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Step 9	Choose whether or not this Activity Log Field Group will be active. Inactive groups will not be visible to users, but remain in the system with all corresponding data in tact
Step 10	Click Save
Step 11	Begin adding fields to the group by double clicking the desired fields from the center menu
Note: To easily locate the desired field names, use the Search box under the Field Names header.	

The screenshot shows the MARQUIS Activity Log Setup interface. On the left, there's a list of 'Activity Log Field Groups' with checkboxes. In the center, the 'Field Names' list is highlighted with a red box, containing various fields like '# of Participants', 'Account #', 'Account Opened', 'Alert Type', 'Application Status', 'Appraisal', 'Balance', 'BSA Subcategory', 'Case #', 'Category', 'Collateral', 'Company/Account', 'Complaint Type', 'Credit Grade', 'Current Debt Balance', 'Date', 'Documentation', 'Employee Name', and 'Employer'. On the right, there's a 'Field Layout' section with a 'Wire Transfer' field and a 'Require All' checkbox.

Step 12	Once the desired fields have been added to the group, click the checkboxes to the left of fields for which data entry is to be required
12.1	Alternatively, click the Require All check box to require data to be entered in all fields

The screenshot shows the MARQUIS Activity Log Setup interface. The 'Field Names' list is still visible. In the 'Field Layout' section, the 'Require All' checkbox is highlighted with a red box. Below it, there are two fields: 'Source' and 'Projected Balance', each with a checkbox and a red box around it, indicating that data entry is required for these fields.

Step 13 Click, drag, and drop the three-dot icon to change the order of the fields

The screenshot shows the Marquis ONE Administration interface. The top navigation bar includes 'Dashboard', 'Discovery', 'Customer Dashboard', 'Work List', and 'Administration'. The 'Administration' tab is selected. Below the navigation bar, the 'Activity Log Setup' page is displayed. The 'Field Layout' section for 'Wire Transfer' is visible, showing a list of fields with three-dot icons for reordering. The 'Wire Transfer' field is highlighted in the 'Activity Log Field Groups' list.

Step 14 Click the X icon to the right of the field name to remove it from the Field Layout


The screenshot shows the Marquis ONE Administration interface. The top navigation bar includes 'Dashboard', 'Discovery', 'Customer Dashboard', 'Work List', and 'Administration'. The 'Administration' tab is selected. Below the navigation bar, the 'Activity Log Setup' page is displayed. The 'Field Layout' section for 'Wire Transfer' is visible, showing a list of fields with X icons for removal. The 'Wire Transfer' field is highlighted in the 'Activity Log Field Groups' list.

Step 15 Click **Save**

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Note: As a shortcut, copy all fields from an existing Activity Log Field Group, then make any necessary changes before clicking **Save**.

Step 16

Click the edit icon  to make the following changes:

- Name of the Activity Log Field Group
- The Activity Log Types to which this group is accessible
- Roles to which this group is accessible
- Set the group as inactive
- Delete the group

16.1 Make any desired changes

16.2 Click **Save**

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Step 17

Click the name of the Activity Log Field Group (to the right of the edit icon) to make changes to fields available in the group and to reorder them.

The screenshot displays the MARQUIS Administration interface. The top navigation bar includes 'Dashboard', 'Discovery', 'Customer Dashboard', 'Work List', and 'Administration' (highlighted). The 'Administration' section has a sub-menu with 'Setup' and 'CallTrax Settings'. The 'Activity Log Setup' page is active, showing a list of 'Activity Log Field Groups' on the left. The 'Wire Transfer' group is selected and highlighted. The main area shows a list of fields for 'Wire Transfer' with checkboxes for 'Require All' and a 'Save' button. The fields listed are: Source, Reason, Projected Balance, and others. The 'Require All' checkbox is checked. The 'Save' button is highlighted with a red box.

17.1 From here, add new fields, remove fields, reorder fields, and change which fields are required

17.2 Click **Save**