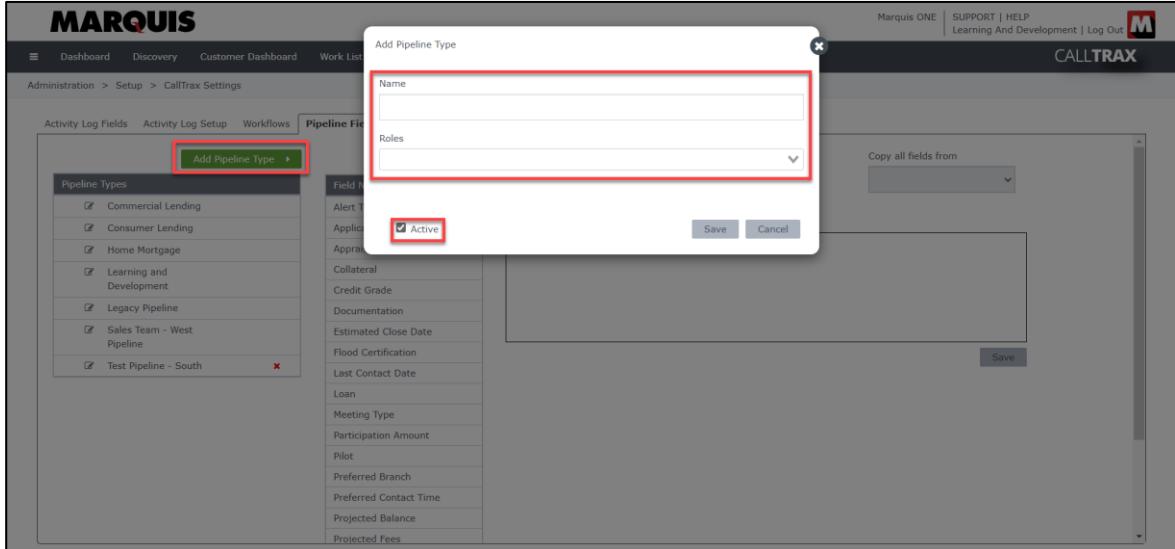


# MARQUIS

CLTX512	CallTrax NEXT Pipeline Fields Management
	The following procedures will guide through creating Pipeline Types and assigning fields to them for each role within CallTrax NEXT.
Order of Steps	Tasks
<b>Step 1</b>	Log into <b>CallTrax NEXT</b> .
<b>Step 2</b>	On the landing page, click on <b>Administration</b> from the main menu
<b>Step 3</b>	Hover the mouse over Setup, and click on <b>CallTrax Settings</b>
<b>Step 4</b>	Click on the <b>Pipeline Fields</b> tab
<b>Step 5</b>	To create a new Pipeline Type, click the green <b>Add Pipeline Type</b> button 5.1 Type the name of the Pipeline Type into the <b>Name</b> box 5.2 To select Roles that will have access to the Pipeline Type, click the drop-down arrow in the <b>Roles</b> box 5.3 Click on all of the desired role(s) to select them 5.4 By default, the Active box will be checked. To deactivate, uncheck the <b>Active</b> box 5.5 Click the <b>Save</b> button
	
<b>Step 6</b>	To define to the <b>Field Layout</b> for the Pipeline Type, click on the Pipeline Type within the list 6.1 To add a field to the layout, click on the desired <b>field</b> in the list 6.2 Click the green <b>Add Field</b> button Repeat the steps to add more fields
<b>Step 7</b>	To mark a field as <b>required</b> , place a <b>check mark</b> in the box to the left of the field name 7.1 To mark all fields as required, place a check mark in the <b>Require All</b> box
<b>Step 8</b>	To <b>remove</b> a field that has been added, click on the <b>X</b> located to the right of the field
<b>Step 9</b>	To adjust the order of the field, click on the <b>three dots</b> to the right of the field, drag and drop in the desired location

# MARQUIS

The screenshot shows the Marquis software interface with the title 'MARQUIS' at the top. The main navigation bar includes 'Dashboard', 'Discovery', 'Customer Dashboard', 'Work List', and 'Administration'. Under 'Administration', the 'Setup > CallTrax Settings' path is selected. The current page is 'Pipeline Fields'. On the left, a list of 'Pipeline Types' is shown with checkboxes next to them. In the center, there's a 'Field Names' list and a 'Field Layout' section titled 'Learning and Development'. The 'Field Layout' section includes a 'Require All' checkbox, a checked 'Application Status' checkbox, and several other fields like 'Credit Grade', 'Documentation', 'Collateral', etc., each with a delete icon. A red box highlights the 'Add Field' button in the top right of the pipeline type list, and another red box highlights the 'Copy all fields from' dropdown in the 'Field Layout' section.

- Step 10** To **copy fields** from another Pipeline Type, click the drop-down arrow in the "Copy all fields from" box
- 10.1 Click on the **Pipeline Type** from within the list
  - 10.2 The fields will auto-populate in the Field Layout once the "Copy all fields from" type is selected

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- Step 11** To **edit** an existing Pipeline Type **field layout**, click on the desired Pipeline Type name
- 11.1 Repeat the steps above to add or remove fields
  - 11.2 Click the **Save** button to retain any changes made
- Step 12** To edit the **Name** or **Active** status of a Pipeline Type, click the edit button next to the Pipeline name
- 12.1 Make the desired changes
  - 12.2 Click **Save** button to retain changes