

MARQUIS

CLTX602 CallTrax NEXT Group Management	
	The following procedures will guide through creating new Groups to be applied to incentives and goals within CallTrax NEXT as well as managing those that have been created.
Order of Steps	Tasks
Step 1	Log into CallTrax NEXT .
Step 2	On the landing page, click on Administration from the main menu
Step 3	Hover the mouse over Setup, and click on Goals & Incentives
Step 4	To edit an existing group, click on it within the Group list
4.1	Modify the group name , if desired
4.2	Modify the Start date by typing in the box or selecting a date from the calendar box
4.3	Modify the End date by typing in the box or selecting a date from the calendar box
Note: The Start and End dates are used to define when the group will be available for applying to incentives or goals. If the group will never be inactive, leave the End date field blank.	
4.4	Change which type the group will consist a list of by clicking the radio dial beside the desired type:
4.5	To select an item to include in the list, place a checkmark in the Include box
4.6	To remove an item from the list, uncheck the Include checkbox
4.7	Change the Start date for the item, if desired, by typing in the box or selecting a date from the calendar box
4.8	Modify the End date by typing in the box or selecting a date from the calendar box, if desired
Note: The Start and End dates are used to define when the item will be actively applied to incentives or goals. If the item will never be inactive, leave the End date field blank.	
	<p>The screenshot shows the CallTrax NEXT administration interface. At the top, there's a navigation bar with links for Dashboard, Discovery, Customer Dashboard, Work List, and Administration. Under Administration, the path is Administration > Setup > Goals/Incentives. On the left, there's a sidebar with categories like Region, Officer, and Sales Team, each listing various names. The main area shows a table for groups. A specific row for 'Learning and Development' is selected and edited. The 'Group Name' is 'Learning and Development'. The 'Start Date' is set to '01/01/2018' and the 'End Date' is set to 'MM/DD/YYYY'. The 'Type' is set to 'Branch'. Below this, there's a list of items with checkboxes, where '0011' and '0004' are checked. The 'Start' column for '0011' is also set to '01/01/2018'.</p>
4.9	Click the Save button located at the bottom of the page
Step 5	To disable a group, click on the group within the list
5.1	Edit the End date to reflect the date it should be disabled
5.2	Click the Save button located at the bottom of the page
Step 6	To delete a group, click on it within the list
6.1	Click the Delete button
6.2	Select Yes in the confirmation message

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Note: When a group is deleted, all associated goals and incentives will be deleted as well. If a group no longer needs to be applied, simply update the end date to deactivate it rather than delete it.

The screenshot shows the MARQUIS software interface. At the top, there's a navigation bar with links for Dashboard, Discovery, Customer Dashboard, Work List, and Administration. The Administration link is highlighted in red. Below the navigation, a breadcrumb trail shows 'Administration > Setup > Goals/Incentives'. On the left, a sidebar has tabs for Groups, Goals, Incentives, Manual Items, and Manual Data Entry. The Groups tab is selected. The main area displays a list of groups under 'Region' and 'Officer'. Under Region, 'Learning and Development' is selected, showing its details: Start Date 01/01/2019 and End Date 01/01/2019. Under Officer, several staff members are listed with their start dates. To the right of the list, there's a form to edit the group. The 'Group Name' is set to 'Learning and Development'. The 'Start' date is 01/01/2019. The 'End' date is currently MM/DD/YYYY, which is highlighted with a red box. Below the start date, there are radio buttons for Bank, Product, Region, Service, Branch, and Account Type. There's also a 'Select/DeSelect All' checkbox. A table below lists group codes (DEFAULT, FFLD, NFRANK, SFRANK) with their descriptions (Default, Fairfield, North Franklin, South Franklin) and start/end dates. The 'NFRANK' and 'SFRANK' rows have checkboxes checked. At the bottom right of the edit dialog, there are 'Delete', 'Save', and 'Cancel' buttons, with 'Save' also highlighted with a red box.