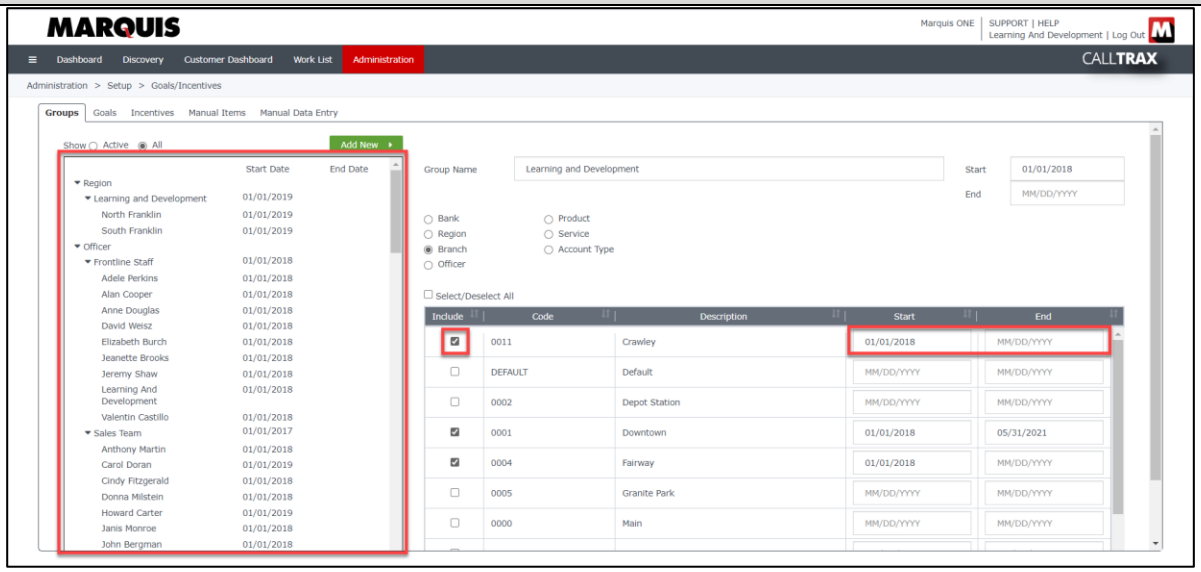
MARQUIS

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.	
	
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

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.