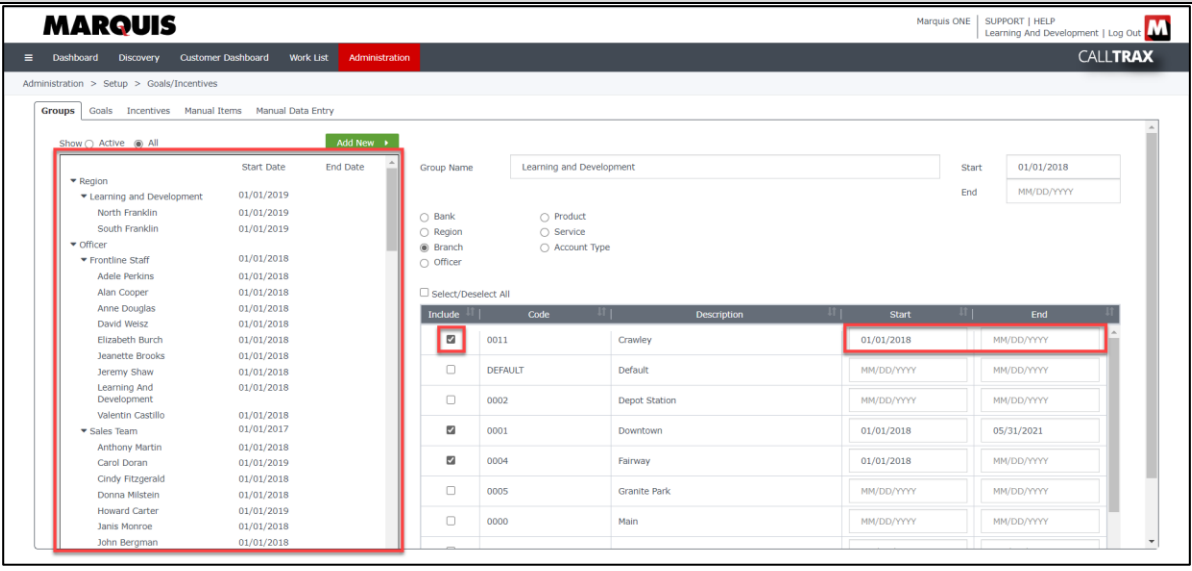


MARQUIS

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

MARQUIS

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.

Marquis ONE

SUPPORT | HELP

Learning And Development | Log Out

M

Dashboard

Discovery

Customer Dashboard

Work List

Administration

Administration > Setup > Goals/Incentives

CALLTRAX

Groups

Goals

Incentives

Manual Items

Manual Data Entry

Show ☐ Active ☒ All

Add New

Region

Learning and Development

North Franklin

South Franklin

Officer

Frontline Staff

Adele Perkins

Alan Cooper

Anne Douglas

David Weisz

Elizabeth Burch

Jeanette Brooks

Jeremy Shaw

Learning And Development

Valentin Castillo

Sales Team

Anthony Martin

Carol Doran

Cindy Fitzgerald

Donna Milstein

Howard Carter

Janis Monroe

John Bergman

Start Date

01/01/2019

01/01/2019

01/01/2019

01/01/2018

01/01/2018

01/01/2018

01/01/2018

01/01/2018

01/01/2018

01/01/2018

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01/01/2018

01/01/2017

01/01/2018

01/01/2019

01/01/2018

01/01/2018

01/01/2019

01/01/2018

01/01/2018

End Date

Group Name

Learning and Development

Start

01/01/2019

End

MM/DD/YYYY

☐ Bank

☐ Product

☒ Region

☐ Service

☐ Branch

☐ Account Type

☐ Officer

☐ Select/Deselect All

Include	Code	Description	Start	End
<input type="checkbox"/>	DEFAULT	Default	MM/DD/YYYY	MM/DD/YYYY
<input type="checkbox"/>	FLD	Fairfield	MM/DD/YYYY	MM/DD/YYYY
<input checked="" type="checkbox"/>	NFRANK	North Franklin	01/01/2019	MM/DD/YYYY
<input checked="" type="checkbox"/>	SFRANK	South Franklin	01/01/2019	MM/DD/YYYY

Delete

Save

Cancel