

MARQUIS

CLTX605	CallTrax NEXT Goal Management
	The following procedures will guide through creating new Goals to track within CallTrax NEXT.
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	Click on the Goals tab
Step 5	To edit an existing goal, click on it within the list
5.1	Modify the description within the Name box, if desired
Note: The name must be unique to both the goals and incentives tabs. If the name already exists in either area, a message will pop up when saving, preventing the goal from being saved until a unique name is entered.	
5.2	Modify the Start date by typing in the box or selecting a date from the calendar box, if desired
5.3	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 group will be available for applying to incentives or goals. If the group will never be inactive, leave the End date field blank.	
5.4	Click the radio dial next to the desired Type
Note: Hovering the mouse over the question mark will provide a description for each item within that segment. Use it to assist in making the appropriate choice for your goal.	
5.5	Click the radio dial next to the desired Level
5.6	Click the radio dial next to the desired option for the selected Level
5.7	If a Group or Specific option is selected, click the appropriate drop-down to select the group or specific option
5.8	Click the radio dial next to the desired Item
5.9	Click the radio dial next to the desired option for the selected Item
5.10	If a Group or Specific option is selected, click the appropriate drop-down to select the group or specific option
5.11	Click the radio dial next to the desired Measure option
Note: Remember, hover the mouse over the question mark to review detailed descriptions for the different options available in the segment. This will assist in selecting the appropriate measurement choice for your goal.	
5.12	Update the numeric value in the Goal box, if desired
5.13	Click the Save button

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The screenshot shows the MARQUIS Administration interface. The top navigation bar includes 'Dashboard', 'Discovery', 'Customer Dashboard', 'Work List', and 'Administration'. The breadcrumb trail is 'Administration > Setup > Goals/Incentives'. The main content area is titled 'Goals' and includes a table of goal items and a 'Goal Setup' form. The 'View Report' button is highlighted with a red box in the top right corner of the main content area.

Step 6 To view a report of all setups, click the **View Report** button

6.1 To print a copy of the report, click the **Select Output** button

6.2 Click on the desired **output type**:

- PDF
- Excel

This screenshot is identical to the one above, showing the MARQUIS Administration interface with the 'View Report' button highlighted in red. It provides a second view of the same interface for instructional purposes.