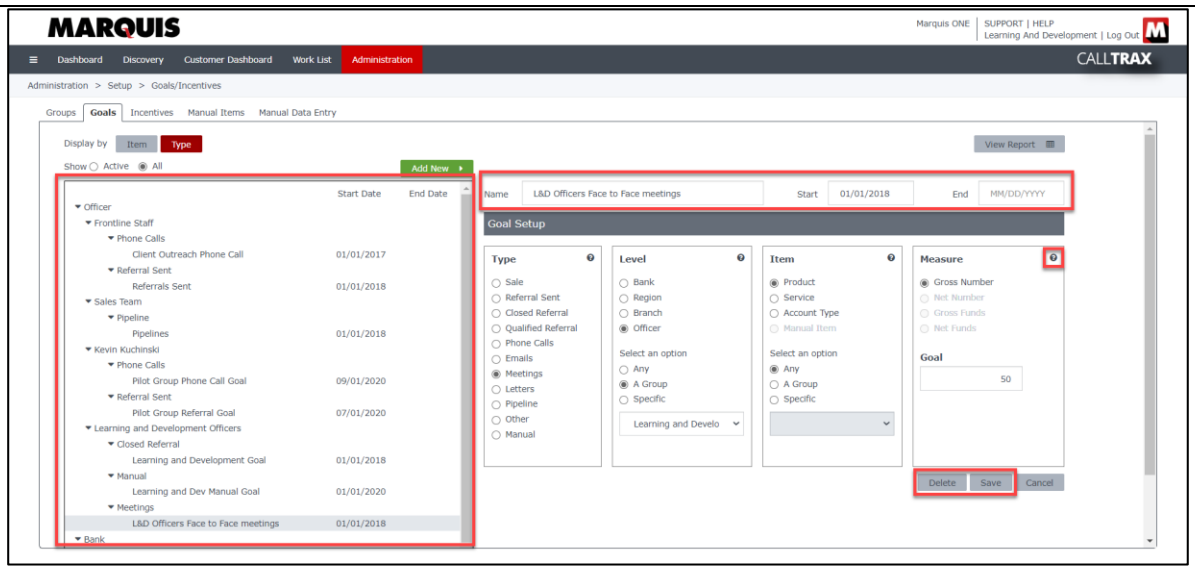
MARQUIS

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 choise for your goal.	
5.12	Update the numeric value in the **Goal** box, if desired
5.13	Click the **Save** button

	
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