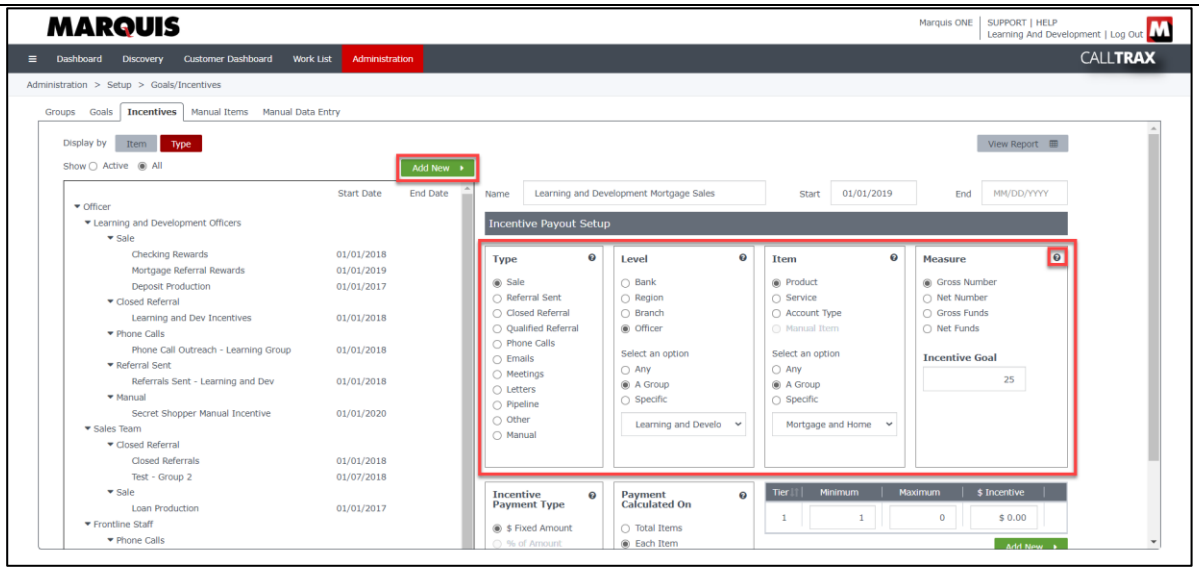
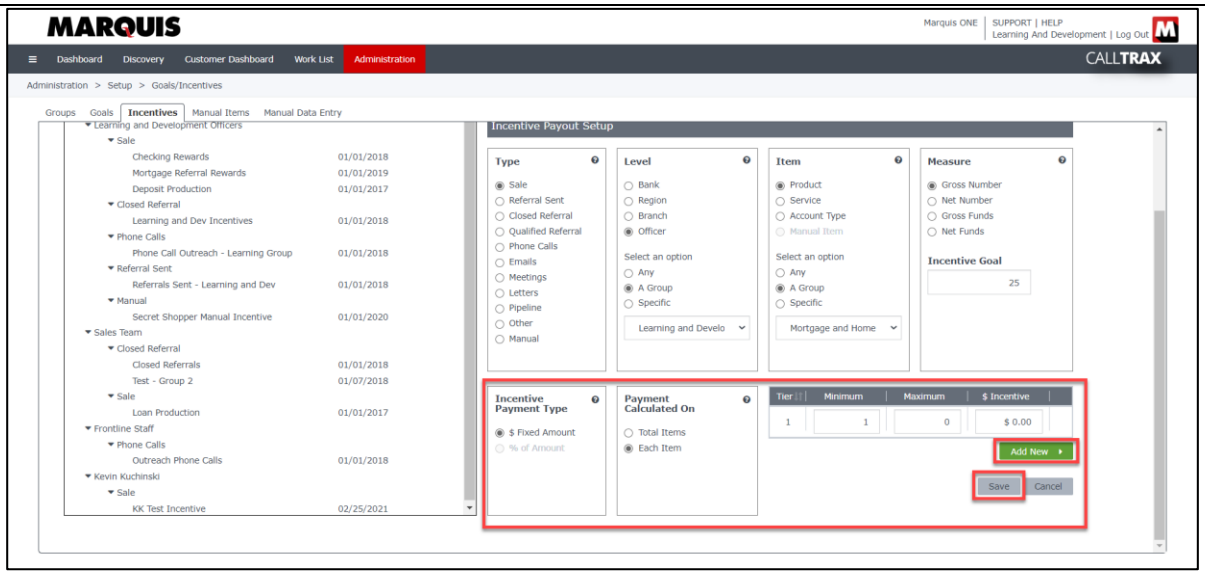
MARQUIS

CLTX607	CallTrax NEXT Create New Incentives
	The following procedures will guide you through creating new Incentives 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 **Incentives** tab
Step 5	To create a new Goal, click the green **Add New** button
5.1	Type in a description for the goal in the **Name** box
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	Designate the **Start date** by typing in the box or selecting a date from the calendar box
5.3	Designate 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 incentive will be available for tracking. If the incentive 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	Type in a numeric value in the **Incentive Goal** box

	
5.13	Click the radio dial next to the desired **Incentive Payment Type**
5.14	Click the radio dial next to the desired **Payment Calculated On**
5.15	Establish the incentive Tiers
	• Type in the desired value into the **Minimum** box
	• Type in the desired value into the **Maximum** box for the tier
	• Type in the desired incentive pay for the tier in the **$ Incentive** box
5.16	To add another tier, click the green **Add New** button located under the Tier box
5.17	Repeat the steps above to build the tier
5.18	To **remove** a tier, click the X located to the right of the tier in the list
	Repeat for as many tiers as needed for the Incentive.
Note: CallTrax NEXT requires at least one tier to be defined. Add as many tiers as needed for the incentive.	
5.19	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