

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 choice for your goal.	
5.12	Type in a numeric value in the Incentive Goal box

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Administration > Setup > Goals/Incentives

Groups Goals **Incentives** Manual Items Manual Data Entry

Display by **Item** **Type** **Add New** View Report

Show ☐ Active ☒ All

Name Learning and Development Mortgage Sales Start 01/01/2019 End MM/DD/YYYY

Incentive Payout Setup

Type
☒ Sale
☐ Referral Sent
☐ Closed Referral
☐ Qualified Referral
☐ Phone Calls
☐ Emails
☐ Meetings
☐ Letters
☐ Pipeline
☐ Other
☐ Manual

Level
☐ Bank
☐ Region
☐ Branch
☒ Officer
 Select an option
☐ Any
☒ A Group
☐ Specific
 Learning and Develo

Item
☒ Product
☐ Service
☐ Account Type
☐ Manual Item
 Select an option
☐ Any
☒ A Group
☐ Specific
 Mortgage and Home

Measure
☒ Gross Number
☐ Net Number
☐ Gross Funds
☐ Net Funds
 Incentive Goal
 25

Incentive Payment Type
☒ Fixed Amount
☐ % of Amount

Payment Calculated On
☐ Total Items
☒ Each Item

Tier	Minimum	Maximum	\$ Incentive
1	1	0	\$ 0.00

Add New

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

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Administration > Setup > Goals/Incentives

Groups Goals **Incentives** Manual Items Manual Data Entry

▼ Learning and Development Officers

▼ Sale

Checking Rewards 01/01/2018

Mortgage Referral Rewards 01/01/2019

Deposit Production 01/01/2017

▼ Closed Referral

Learning and Dev Incentives 01/01/2018

▼ Phone Calls

Phone Call Outreach - Learning Group 01/01/2018

▼ Referral Sent

Referrals Sent - Learning and Dev 01/01/2018

▼ Manual

Secret Shopper Manual Incentive 01/01/2020

▼ Sales Team

▼ Closed Referral

Closed Referrals 01/01/2018

Test - Group 2 01/07/2018

▼ Sale

Loan Production 01/01/2017

▼ Frontline Staff

▼ Phone Calls

Outreach Phone Calls 01/01/2018

▼ Kevin Kuchinski

▼ Sale

KK Test Incentive 02/25/2021

Incentive Payout Setup

Type
☒ Sale
☐ Referral Sent
☐ Closed Referral
☐ Qualified Referral
☐ Phone Calls
☐ Emails
☐ Meetings
☐ Letters
☐ Pipeline
☐ Other
☐ Manual

Level
☐ Bank
☐ Region
☐ Branch
☒ Officer
 Select an option
☐ Any
☒ A Group
☐ Specific
 Learning and Develo

Item
☒ Product
☐ Service
☐ Account Type
☐ Manual Item
 Select an option
☐ Any
☒ A Group
☐ Specific
 Mortgage and Home

Measure
☒ Gross Number
☐ Net Number
☐ Gross Funds
☐ Net Funds
 Incentive Goal
 25

Incentive Payment Type
☒ Fixed Amount
☐ % of Amount

Payment Calculated On
☐ Total Items
☒ Each Item

Tier	Minimum	Maximum	\$ Incentive
1	1	0	\$ 0.00

Add New

Save **Cancel**

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

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

- PDF
- Excel

The screenshot displays the MARQUIS Incentives Management System interface. The top navigation bar includes links for Dashboard, Discovery, Customer Dashboard, Work List, and Administration. The main content area is titled 'Incentives' and shows a tree view of incentive categories on the left. The right side of the interface is the 'Incentive Payout Setup' form, which includes fields for Name, Start, End, Type, Level, Item, Measure, and Incentive Goal. A 'View Report' button is highlighted in the top right corner of the form area.