

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** View Report

Show Active All **Add New**

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

Administration > Setup > Goals/Incentives

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Incentive Payout Setup

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Level
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 Select an option
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 A Group
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 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' setup page. At the top right, there are links for 'SUPPORT | HELP' and 'Learning And Development | Log Out'. The navigation bar includes 'Dashboard', 'Discovery', 'Customer Dashboard', 'Work List', and 'Administration'. The breadcrumb trail is 'Administration > Setup > Goals/Incentives'. The page title is 'Incentives' with sub-tabs for 'Manual Items' and 'Manual Data Entry'. A 'View Report' button is highlighted with a red box. The main content area is titled 'Incentive Payout Setup' and includes a table of incentives with columns for Name, Start Date, and End Date. The 'Name' field is 'Learning and Development Mortgage Sales', 'Start' is '01/01/2019', and 'End' is 'MM/DD/YYYY'. Below this are several configuration sections: 'Type' (Sale, Referral Sent, Closed Referral, Qualified Referral, Phone Calls, Emails, Meetings, Letters, Pipeline, Other, Manual), 'Level' (Bank, Region, Branch, Officer), 'Item' (Product, Service, Account Type, Manual Item), 'Measure' (Gross Number, Net Number, Gross Funds, Net Funds), 'Incentive Goal' (25), 'Incentive Payment Type' (\$ Fixed Amount, % of Amount), and 'Payment Calculated On' (Total Items, Each Item). A table at the bottom shows a single tier with a minimum of 1, a maximum of 0, and an incentive of \$ 0.00.