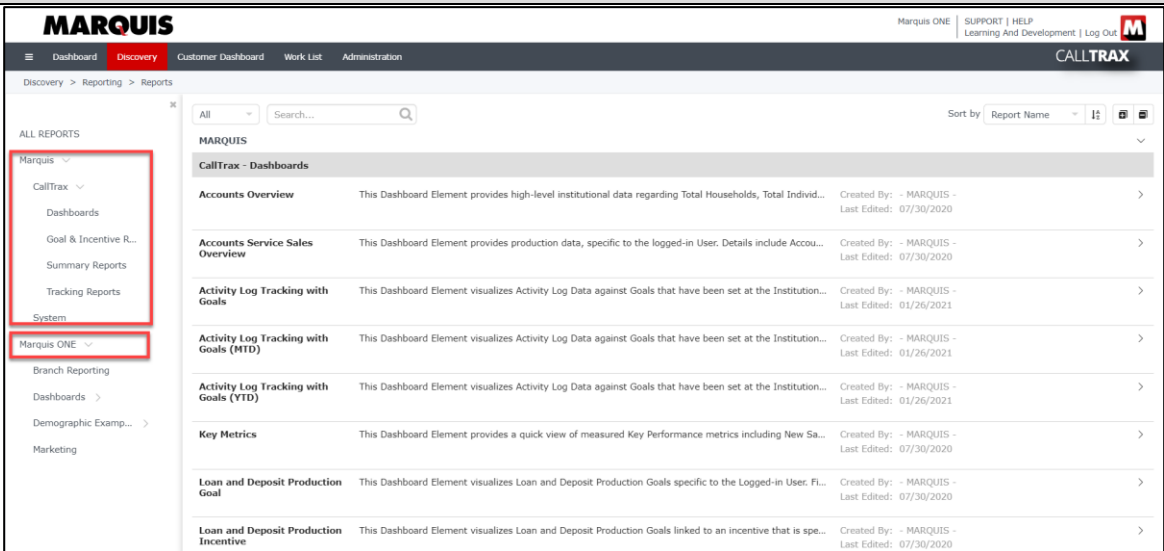


MARQUIS

CLTX901	CallTrax NEXT Generating Reports
	The following procedures will guide through processing the reports available through the Discovery tool within CallTrax NEXT.
Order of Steps	Tasks
Step 1	Log into CallTrax NEXT .
Step 2	On the landing page, click on Discovery from the main menu.
Step 3	Hover the mouse over Reporting
Step 4	Click on Reports
Note: All CallTrax NEXT reports are grouped within the Marquis/CallTrax category and are further segmented into sub-categories within CallTrax. Any reports that have been customized to your institution will be located within your own institution report category.	
	
Note: The Search box is available at the top of the page for quickly locating the desired report using key words.	
Step 5	To view a report, click on the bold report name
	The report will automatically display based on default filter parameters
Step 6	To configure the parameters, click the > Filters button
6.1	To expand the filter section, click on the three dots and drag down

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Dashboard **Discovery** Customer Dashboard Work List Administration

Discovery > Reporting > Reports > Report Viewer

Hide Header & Footer Subscribe Print Email Export Edit Save As Cancel Close

Goal Detail Preview Records 100

Filters Apply Filter

* Summarize By Goal Name Goal Type Measure

Bank Region Branch Officer

* Time Period Start Date End Date

MARQUIS Marquis ONE

This Report contains details of Activity Logs linked to a goal. This report allows you to drill-down into individual Activities for review, if necessary. Filterable by Bank, Region ,Branch, Officer, Goal Name/Type, Measure, and Time Period.

Report Filter Info:
 1 Summarize By = Bank
 2 Goal Name = [ALL]
 3 Goal Type =
 4 Measure =
 5 Bank =
 6 Region =

6.2 Click on each filter **field** to designate a new selection, if desired

Note: Any fields that contain “Multiple Selection” in the name when clicked on will enable the ability to make more than one selection for that field. If the field does not display “Multiple Selection”, only one selection will be allowed.

6.3 If a drop-down arrow is present, click it and make a selection from a list

6.4 For “Multiple Selection” fields, click the **drop-down arrow** and click on as many selections, as desired

6.5 To remove a selection from a “Multiple Selection” field, click the drop-down arrow and click the **X** next to the desired selection to be removed

6.6 For date fields, click in the field and type in the **date** or select it within the calendar box

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Dashboard **Discovery** Customer Dashboard Work List Administration

Discovery > Reporting > Reports > Report Viewer

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Goal Detail Preview Records 100

Filters Apply Filter

* Summarize By - Equals (Selection) - Single Selection Goal Name - Equals (Manual Entry) - Multiple Selection Goal Type Measure

Bank Region Branch Officer

* Time Period Start Date - Equals (Date) End Date

MARQUIS Marquis ONE

This Report contains details of Activity Logs linked to a goal. This report allows you to drill-down into individual Activities for review, if necessary. Filterable by Bank, Region ,Branch, Officer, Goal Name/Type, Measure, and Time Period.

Report Filter Info:
 1 Summarize By = Bank
 2 Goal Name = [ALL]
 3 Goal Type =
 4 Measure =
 5 Bank =
 6 Region =

Note: Any fields containing a red asterisks next to it is identified as a required field and must have a selection in order for the report to generate.

6.7 Once filter selections are made, click the **Apply Filter** button

The report will update to display based on the new filter selections

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Discovery > Reporting > Reports > Report Viewer

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Goal Detail Preview Records 100

Filters

Summarize By Goal Name Goal Type Measure

Bank Region Branch Officer

Time Period Start Date End Date

MARQUIS *** Marquis ONE

This Report contains details of Activity Logs linked to a goal. This report allows you to drill-down into individual Activities for review, if necessary. Filterable by Bank, Region ,Branch, Officer, Goal Name/Type, Measure, and Time Period.

Report Filter Info:
 1 Summarize By = Bank
 2 Goal Name = [ALL]
 3 Goal Type =
 4 Measure =
 5 Bank =
 6 Region =

Step 7 To generate a copy of the report, click the **Export** button

7.1 Click on the desired format: **Excel, PDF, CSV**

Step 8 To send to a printer, click the **Print** button

Step 9 To navigate back to the reports, either click the **Close** button or click on **Reports** within the path showing in the upper left-hand corner of the page

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Discovery > Reporting > **Reports** > Report Viewer

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Goal Detail Preview Records Excel PDF CSV

Filters

This Report contains details of Activity Logs linked to a goal. This report allows you to drill-down into individual Activities for review, if necessary. Filterable by Bank, Region ,Branch, Officer, Goal Name/Type, Measure, and Time Period.

Report Filter Info:
 1 Summarize By = Bank
 2 Goal Name = [ALL]
 3 Goal Type =
 4 Measure =
 5 Bank =
 6 Region =
 7 Branch =
 8 Officer =
 9 Time Period = Last Year
 10 Start Date =
 11 End Date =

Goal Detail

Default

Level	Goal Name	Done Date	Goal Contact Name	Goal Measurement	Goal Type	\$ Total Funds
Specific: Default	YTD Pipeline Production	05/15/2020	Marcia Monroe Olson	Gross Funds	Pipeline	\$156,000.00
Specific: Default	YTD Pipeline Production	07/31/2020	Dibbert Group And Sons	Gross Funds	Pipeline	\$350,000.00