# <sup>°</sup>GENESYS<sup>™</sup>

# **Goal Manager**

# **Printable Help**

Version 2020 R1

Last updated April 21, 2020

# Abstract

This document is a printable version of Goal Manager help.

For copyright and trademark information, see <u>https://help.genesys.com/latitude/Liquid/Desktop/Copyright\_and\_Trademark\_Information.htm</u>.

# **Table of Contents**

Introduction to Goal Manager	4
Log on to Goal Manager	4
Overview of Goal Manager Window	5
Help Overview	6
Search feature	7
Search syntax	7
Wildcard expressions	7
Boolean operators	8
Nested expressions	8
Goal Management	8
Goal Management	8
Company Groups	8
Company Groups	8
Create a Company Group	9
Rename a Company Group	9
Delete a Company Group	9
Customer Groups	9
Customer Groups	9
Create a Customer Group	9
Move a Customer to a Customer Group	
Rename a Customer Group	
Delete a Customer Group	
View Goals for a Customer Group	
Set the Posting Days	
Goal Wizard	13
Goal Wizard	13
Start the Goal Wizard	13
Define the Goal Context	14
Specify the Goal Entities	15
Specify Goal Settings	16

	Clone the Goals	17
	Set the Goals	18
G	oal Dashboards	20
	Goal Dashboards	20
	Collector Dashboard	20
	Supervisor Dashboard	21
	Manager Dashboard	23
	Owner Dashboard	25
	Company Customer Goals	25
	Graphical	26
	Print the Dashboard	27
	Specify the Dashboard View	27

# **Introduction to Goal Manager**

Goal Manager allows your organization to set fee and gross amount goals for desks and customer groups. Company goals are goals that your organization defines for your customers, grouped by company. Goal Manager releases with the "Catch-All Goal Group" which contains all customers defined in Latitude. You can add company and customer groups and move customers between groups, based on your needs. You can also set goals for the desks based on the hierarchy defined in Latitude. Upper level goals contain the "rolled up" goals for its subgroups.

# Log on to Goal Manager

Use the Interaction Collector Logon dialog box to log on to Goal Manager.

#### To log on to Goal Manager

- 1. Do one of the following:
  - On your desktop, click the shortcut to Goal Manager.
  - Click Start > All Programs > Interactive Intelligence > Interaction Collector > Management Suite > Goals Manager.

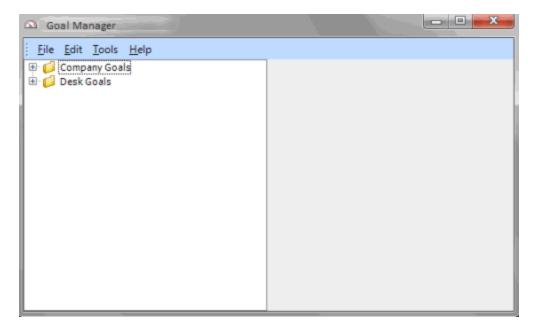
The Interaction Collector Logon dialog box appears.

獢 Interaction Colle	ctor Logon	×
User Name:		
Password:		
Database:	Default Instance	▼
🔲 Log in using Wi	ndows authentication	
<u>C</u> ancel		<u>O</u> kay

- 2. In the **User Name** box, type your Latitude user name.
- 3. In the **Password** box, type your Latitude password. As you type your password, periods display instead of the typed characters.

**Note:** Premises-based clients can use Windows authentication to bind Latitude users to their Windows identity to permit logging on to Latitude automatically. Windows authentication is not available for hosted clients. To log on using Windows authentication, select the **Log in using Windows authentication** check box and provide your Windows user name and password.

4. Click Okay. The Goal Manager window appears.



# **Overview of Goal Manager Window**

Use the **Goal Manager** window to view the goals that your organization set.

Interaction Collector Goals								_ O X
Eile Edit Tools Help 1								
🖃 🧔 Company Goals 🛛 🛛 2			3		Catch-	All Goal Group		
🖻 🕵 Catch-All Goal Group			_	_		Year		-
<ul> <li>Branches</li> <li>00000 (Branch)</li> <li>00001 (Branch)</li> </ul>			20	14				
E 🚨 Customers			-	Branch +	Month -Þ	Posting Days +	Fees -	Gross +
ABC Customer [0000011]	Ξ		🕨	00000	January	0	10000.00	100000.00
CUSTOMER ONE [0000001]				00001	January	0	10000.00	100000.00
CUSTOMER TWO [0000002]				00001	February	0	10000.00	100000.00
DIALER TEST CUSTOMER [000		-		00000	February	0	10000.00	100000.00
FIRST CUSTOMER [0000007]				00000	March	0	10000.00	100000.00
SECOND CUSTOMER [0000008				00001	March	0	10000.00	100000.00
			-[]	00001	April	0	10000.00	100000.00
E 📴 COLLECTIONS DEPARTMENT (Dep			-	00000	April	0	10000.00	100000.00
BLUE TEAM (Team)				00000	May	0	10000.00	100000.00
COLLECTOR 1 DESK [C1] (	2			00001	Мау	0	10000.00	100000.00
POD COLLECTOR [POD] (D     DIALER (Team)	+		[	00001	June	0	10000.00	100000.00
< H				00000	June	0	10000.00	100000.00 -

1. **Menu bar**: Displays available menu options and commands for the window.

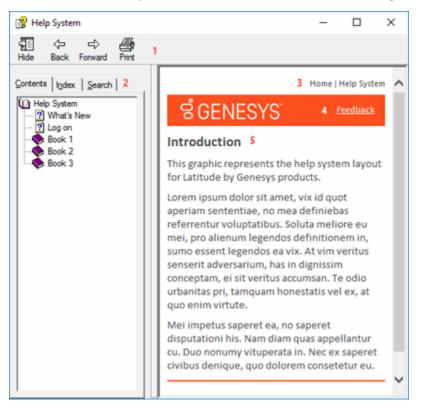
- 2. **Navigation Explorer pane**: Displays the navigation for the window. Click a category in the **Navigation Explorer** pane (for example, Company Goals, Customers). The goals for that category appear in the **Information** pane.
- 3. Information pane: Displays the goals for the category selected in the Navigation Explorer pane.

# **Help Overview**

Goal Manager help provides you with information for using Goal Manager. To locate and view a topic, use the table of contents, index, and search features.

#### To open help

In menu bar, click Help and then click Contents. The Goal Manager Help window appears.



**Tip**: To adjust the width and height of the window or its panes, click the edge of the window or pane and drag it up or down, left or right.

- 1. **Toolbar:** Displays options for the help window.
- 2. Tabs: Displays the following:

**Contents:** Displays the table of contents. To display a topic in the **Content** pane, expand a book and then click the link.

**Index:** Displays the index. To display a topic in the **Content** pane, type a keyword or phrase in the box (or scroll through the list) and then click the link in the list.

**Search:** Displays the <u>search feature</u>. To display a topic in the **Content** pane, type a keyword or phrase in the box and then press **Enter**. In the search results, click the link.

- 3. **Breadcrumbs:** Displays your current location within the help system. When you click a breadcrumb, the related topic displays.
- 4. **Content toolbar:** Displays an option to send feedback through an email message to Latitude by Genesys Documentation.
- 5. **Content pane:** Displays the contents of a topic. To view the **Content** pane menu, right-click in the **Content** pane.

# Search feature

You can use the search feature to search for topics that contain words or phrases that you specify. You formulate a search query following a specific <u>set of rules</u>. You can include <u>wildcard expressions</u>, <u>Boolean</u> <u>operators</u>, and <u>nested expressions</u> in your search query. A list of topics that match your search criteria appear in the search results. When you click a topic title in the search results, the content of that topic appears in the **Content** pane.

# Search syntax

The basic rules for formulating search queries are:

- Searches are not case-sensitive, meaning you can type uppercase or lowercase characters.
- You cannot search for a single character or the following reserved words: an, and, as, at, be, but, by, do, for, from, have, he, in, it, not, of, on, or, she, that, the, there, they, this, to, we, which, with, you.
- The search engine ignores punctuation marks and special characters such as @#\$%^&()=+[]\.
- Enclose phrases and terms that include a period (such as a file name with an extension) in double quotation marks.

# Wildcard expressions

Wildcard expressions allow you to search for one or more characters using a question mark or asterisk. A question mark represents a single character, while an asterisk represents one or more characters.

Search for	Example	Result					
Topics with text that starts with one or more specified characters and ends in any character or number of characters	log or log*	Returns all topics with text that starts with the specified characters (for example, log, logon, logging).					
Topics with text that starts with the specified characters, has a single character that can be anything, and ends in the specified characters	32?57	Returns all topics with text that has any character where you placed a question mark (for example, 32?57 returns 32257, 32457, and 32857).					
specified, in any order or placement	account status	Returns all topics with both account and status, but not necessarily as a phrase or in the order specified For example, the search returns topics with "the account status" or "the status of the account"					

Search for	Example	Result
	account status"	Returns all topics with account status as a phrase. For example, the search returns topics with "the account status" but not "the status of the account"

#### **Boolean operators**

Boolean operators (AND, OR, NOT, NEAR) allow you to create a relationship between terms. If you don't specify an operator, the system uses AND by default.

Search for	Example	Result
AND	account AND	Returns all topics with both account and status, but not necessarily as a phrase or in the order specified. For example, the search returns topics with "the account status" or "the status of the account"
OR	account OR status	Returns all topics with either account or status, or both.
NOT	account NOT status	Returns all topics with account but not status.
NFAR	account NEAR status	Returns all topics where account is within eight words of status.

# **Nested expressions**

Nested expressions allow you to perform complex searches. For example, queue AND ((collector OR clerical) not supervisor) finds topics containing queue and collector but not supervisor, or containing queue and clerical but not supervisor. As with mathematical expressions, the system evaluates expressions in parentheses first. If there is no parenthesis, the system evaluates the expression from left to right. For example, queue NOT (clerical OR supervisor) finds topics containing queue but not clerical or supervisor. Queue NOT clerical OR supervisor finds topics containing queue but not clerical, or topics containing supervisor.

# **Goal Management**

# **Goal Management**

You can create and manage company and customer groups for which to set goals. You set company goals for divisions within your organization using company groups. You set customer goals using customer groups.

# **Company Groups**

#### **Company Groups**

Use company groups to manage goals for divisions within your organization. The company folders display "rolled up" goals for the customer groups they contain.

#### **Create a Company Group**

Use the **Navigation** pane to create a company group.

#### To create a company group

- 1. In the **Navigation** pane, do one of the following:
- 2. To create a top-level company group, right-click **Company Goals** and then click **Add Company Grouping**.
- 3. To create a subgroup within a company group, right-click the company group name and then click **Add Company Grouping**. The system creates a folder.
- 4. In the new folder box, type the company group name and then press Enter.

#### **Rename a Company Group**

Use the **Navigation** pane to rename a company group.

#### To rename a company group

- 1. Right-click a company group name and then click **Rename Company Grouping**. The folder box opens in edit mode.
- 2. In the folder box, type the new company group name and then press Enter.

#### **Delete a Company Group**

Use the **Navigation** pane to delete a company group. If a company group contains subgroups, you cannot delete the company group.

#### To delete a company group

• Right-click a company group name and then click **Delete Company Grouping**. The system deletes the company group.

# **Customer Groups**

#### **Customer Groups**

Use customer groups to segregate customers for goal setting. Goal Manager releases with the default "Catch-All Goal Group" which contains all customers your organization defined in Latitude. You can move customers to customer folders that you create; however, you can only assign a customer to one group at a time. You can also move customers back to the default customer group.

#### **Create a Customer Group**

Use the **Navigation** pane to create a customer group.

#### To create a customer group

- 1. In the **Navigation** pane, do one of the following:
- 2. To create a customer group within the top-level company group, right-click **Company Goals** and then click **Add Customer Goal Grouping**.

- 3. To create a customer group within a company subgroup, right-click the company group name and then click **Add Customer Goal Grouping**. The system creates a folder.
- 4. In the new folder box, type the company group name and then press **Enter**.

### Move a Customer to a Customer Group

Use the **Navigation** pane to move a customer to a customer group. You can move customers to groups that you created and move them back to the default "Catch-All Goal Group."

#### To move a customer to a customer group

- 1. Expand a user-defined or the default customer group.
- 2. Click a customer and drag and drop it onto a **Customers** folder or the default customer group folder.

#### **Rename a Customer Group**

Use the Navigation pane to rename a customer group.

#### To rename a customer group

- 1. Right-click a customer group name and then click **Rename Customer Grouping**. The folder box opens in edit mode.
- 2. In the folder box, type the new customer group name and then press Enter.

#### **Delete a Customer Group**

Use the **Navigation** pane to delete a customer group.

#### To delete a customer group

• Right-click a customer group name and then click **Delete Customer Grouping**. The system moves the customer group back to the default "Catch-All Goal Group."

# **View Goals for a Customer Group**

Use the **Navigation** pane to view goals for a customer group.

#### To view goals for a customer group

- 1. In the **Navigation** pane, click a customer group. The years and months for which you set goals appear in the **Information** pane.
- 2. Click the plus sign (+) to expand a year and view its goals.

Company Goals	^				Catch	All Goal Grou	p		
Catch-All Goal Group     Branches	Year								
🖻 🚨 Customers		20	14	******		Internet of the second			1
CUSTOMER ONE [0000001]			Month	₽	Branch 4	Fees	₽ Posting Days +	Gross	-12
CUSTOMER TWO [0000002]     BEFAULT CUSTOMER [000000		-	January		00000	10000.00	0	100000.00	
DIALER TEST CUSTOMER [000		-	January		00001	10000.00	0	100000.00	
FIRST CUSTOMER [0000007] POD CUSTOMER [0000003]			February		00001	10000.00	0	100000.00	
SECOND CUSTOMER [0000008		-	February		00000	10000.00	0	100000.00	
New Company Grouping     New Company Grouping 1		-	March		00000	10000.00	0	100000.00	
Kew Company Grouping 1     Mew Customer Goal Grouping     New Company Grouping 2		-	March		00001	10000.00	0	100000.00	
🖃 🅵 My customer group		-	April		00001	0.00	0	0.00	
Branches 00000 (Branch)		-	April		00000	0.00	0	0.00	
🖃 🔠 00001 (Branch)		-	May		00000	10000.00	0	100000.00	
ABC Customer [0000011]		-	May		00001	10000.00	0	100000.00	
💋 Desk Goals		1	June		00001	10000.00	I o	100000.00	

# **Set the Posting Days**

Use the **Posting Calendar** to specify non-posting days, first posting days, and last posting days. Days not marked are normal posting days.

# To set the posting days

1. In the menu bar, click **Edit** and then click **Posting Calendar**. The posting calendar appears in the **Information** pane.

Interaction Collector Goals													1			3				-		×
<u> </u>																						
🖃 🦆 Company Goals			Sa	ive (	Caler	ndar	Set	tings														
Branches		≪ ∢		Ju	ine 2	2014					July	/ 20:	14				Au	gus	t 20	14		> >>
		S	Μ	Т	W	Т	F	S	S	М	т	W	т	F	S	S	М	т	W	т	F	S
CUSTOMER ONE [0000001]			1	3	- 4	5	6	7			1	2	3	4	5						1	2
CUSTOMER THREE [0000004]			8 9	9 10	11	12	13	14	6	7	8	9	10	11	12	3	4	5	6	7	8	9
CUSTOMER TWO [0000002]	Ξ	1	5 1(	5 17	18	19	20	21	13	14	15	16	17	18	19	10	11	12	13	14	15	16
DEFAULT CUSTOMER [000000		2	2 23	3 24	25	26	27	28	20	21	22	23	24	25	26	17	18	19	20	21	22	23
DIALER TEST CUSTOMER [000		2	9 3	)					27	28	29	30	31			24	25	26	27	28	29	30
DISNEY CUSTOMER [0000010]																31						
FIRST CUSTOMER [0000007]			Se	pter	nbei	201	4			0	ctob	ber 2	2014	ł			No	ven	ıber	201	4	
POD CUSTOMER [0000003]		S	Μ	Т	W	Т	F	S	S	М	т	W	Т	F	s	S	М	т	W	Т	F	S
SECOND CUSTOMER [0000008			1	1 2	3	4	5	6				1	2	3	4							1
THIRD CUSTOMER [0000009]			7 8	39	10	11	12	13	5	6	7	8	9	10	11	2	3	4	5	6	7	8
👘 📁 New Company Grouping		1	4 1	5 16	17	18	19	20	12	13	14	15	16	17	18	9	10	11	12	13	14	15
🖨 📁 New Company Grouping 1		2	1 22	2 23	24	25	26	27	19	20	21	22	23	24	25	16	17	18	19	20	21	22
🗄 🌃 New Customer Goal Grouping		2	8 29	9 30					26	27	28	29	30	31		23	24	25	26	27	28	29
🖻 📁 💋 New Company Grouping 2																30						
🖃 🅵 My customer group			D	ecen	nber	201	4			Ja	anua	ary 2	015				Fe	bru	ary	201	5	
🗎 🔠 Branches		S	Μ	Т	W	Т	F	S	S	М	Т	W	Т	F	s	S	М	т	W	Т	F	S
- 💷 00000 (Branch)			1	1 2	3	4	5	6					1	2	3	1	2	3	4	5	6	7
🔠 00001 (Branch)			7 8	3 9	10	11	12	13	4	5	6	7	8	9	10	8	9	10	11	12	13	14
🖻 🚨 Customers		1	4 1	5 16	17	18	19	20	11	12	13	14	15	16	17	15	16	17	18	19	20	21
		2	1 22	2 23	24	25	26	27	18	19	20	21	22	23	24	22	23	24	25	26	27	28
CUSTOMER FOUR [000000		2	8 29	9 30	31				25	26	27	28	29	30	31							
🖻 🧔 Desk Goals																						
🖶 🏢 00000 (Branch)	Ŧ																					
۰ III ا																						

Color	Menu Option	Description
Black	Toggle Posting Day	Non- posting day
Green	Toggle First Day of Month	First posting day
Red	Toggle Last Day of Month	Last posting day

- 2. Do one of the following:
  - Click a date to change its designation. White dates change to black, black dates change to green, green dates change to red, and red dates change to white.
  - Right-click a date and then click a designation.

**Note**: Set the first posting day within the same month you are setting. You can set the last posting day in a different month.

- 3. To change the month or year displayed, do the following:
  - To display the previous month, click the single left arrow.
  - To display the next month, click the single right arrow.

- To display the previous year, click the double left arrow.
- To display the next year, click the double right arrow.
- 4. Click Save Calendar Settings.

#### **Goal Wizard**

#### **Goal Wizard**

Use the **Goal Wizard** to create goals for desks and customer groups. You can create goals or copy them from existing goals.

#### Start the Goal Wizard

Use the **Goal Wizard** to create goals or copy existing goals.

#### To start the Goal Wizard

1. In the menu bar, click **Tools** and then click **Goal Wizard**. The **Welcome** page of the **Goal Wizard** appears.

Latitude Goal Wizard										
	Welcome to the Latitude Goal Wizard									
	This wizard enables you to create new or clone from existing Monthly Goals that apply to Desks or user-defined Customer Goal Groups. If the goals already exist for the entities in which you are creating, they will be overwritten.									
	To continue, click Next.									
	< Back Next > Cancel									

2. Review the information and then click Next.

# **Define the Goal Context**

Use the Goal Context page of the Goal Wizard to define the context of the goals.

#### To define the goal context

1. Ensure that you have the **Goal Context** page displayed.

Latitude Goal Wizard			
Goal Context This page allows you to define the context of the	goals you are going to	create.	
Which month(s) would you like to create goals fo Choose Month Choose Year	or?		
Which group(s) of goals would you like to create	67		
How would you like to create the goals? New     Clone			
	< Back	Next >	Cancel

**Choose Month:** Month for which to create goals. To create goals for all 12 months, click **All Months**.

Choose Year: Year for which to create goals.

Desk Goals: If selected, indicates that you want to set goals for desks.

**Company Goals:** If selected, indicates that you want to set goals for each division within each customer goal group. (You set customer goals for individual branches separately.)

New: If selected, indicates that you want to create goals by setting new fee and gross amounts.

Clone: If selected, indicates that you want to create goals from previous goals.

2. Complete the information and then click **Next**.

# **Specify the Goal Entities**

Use the **Select Goal Entities** page of the **Goal Wizard** to specify the entities for which to create or copy goals. Entities include company groups, customer groups, desks, branches, departments, and teams. Only the entities that your organization set up in Latitude are available.

#### To specify the goal entities

1. Ensure that you have the **Select Goal Entities** page displayed.

Latitude Goal Wizard	
Select Goal Entities This page allows you to select which item(s) you would like to create/clone goals for.	
Company Goals Catch-All Goal Group New Company Grouping New Company Grouping 1 New Company Grouping 2 Desk Goals COLLECTIONS DEPARTMENT (Department) COLLECTIONS DEPARTMENT (Department) COLLECTIONS DEPARTMENT (Department) COLLECTOR 1 DESK [C1] (Desk) COLLECTOR 1 DESK [C1] (Desk) COLLECTOR [POD] (Desk) COLLECTOR [POD] (Desk) COLLECTOR [POD] (Desk) COLLECTOR [POD] (Desk) COLLECTOR [POD] (Desk) COLLECTOR [POD] (Desk)	
< Back Next >	Cancel

- 2. To set goals for companies, do one of the following:
  - To set goals for all companies, select the **Company Goals** check box.
  - To set goals for specific companies, click the plus sign (+) and then select the company check boxes.

**Note:** If you select a company group level check box, the system selects the check boxes for all groups within that company group. You can clear individual check boxes as necessary.

- 3. To set goals for desks, do one of the following:
  - To set goals for all desks, select the **Desk Goals** check box.
  - To set goals for specific desks, click the plus sign (+) and then select the desk check boxes.

**Note:** If you select a branch level check box, the system selects the check boxes for all departments, teams, and desks within that branch. If you select a department level check box, the system selects the check boxes for all teams and desks within that department. If you select a team level check box, the system selects the check boxes for all desks within that team. You can clear individual check boxes as necessary.

4. Complete the information and then click **Next**.

# **Specify Goal Settings**

Use the **Previous Goal Information** page of the **Goal Wizard** to specify goal settings. You can specify whether to set the goals for each company or desk, or set the same goals for all. This page only displays if you selected the **New** option on the **Goal Context** page. Otherwise, the **Clone Goal** page displays.

#### To specify goal settings

1. Ensure that you have the **Previous Goal Information** page displayed.

Latitude Goal Wizard				
Previous Goal Information This page allows you to ch	oose information rela	tive to the goal(	s) you are creating.	
Would you like to make a  No Yes \$ \$	0.00 in Fee Collect 0.00 in Gross Colle	ions		
To help me calculate my o Current Month Previous Month Previous Year for Month	goals show me Posting Days Posting Days	Coals Goals	Collections and Fees	
		< Ba	idk Next > 0	Cancel

#### Would you like to make the goals the same

**No:** If selected, indicates that you want to set the goals for each company and desk individually.

**Yes:** If selected, indicates that you want to set the same goals for all companies and desks. Provide the goal dollar amounts for fees and gross collections.

**Note:** You can set the same goals for all, and then modify individual companies and desks on the **Goal Worksheet** page.

#### **Current Month**

Posting Days: If selected, displays the number of posting days for the current month.

#### **Previous Month**

Posting Days: If selected, displays the number of posting days for the previous month.

**Goals:** If selected, displays the goals for the previous month.

**Collections and Fees:** If selected, displays the actual collection and fee amounts for the previous month.

#### **Previous Year for Month**

**Posting Days:** If selected, displays the number of posting days for the previous year and current month.

Goals: If selected, displays the goals for the previous year and current month.

**Collections and Fees:** If selected, displays the actual collection and fee amounts for the previous year and current month.

2. Complete the information and then click **Next**.

#### **Clone the Goals**

Use the **Clone Goal** page of the **Goal Wizard** to specify the parameters for cloning goals. This page only displays if you selected the **Clone** option on the **Goal Context** page. Otherwise, the **Previous Goal Information** page displays.

#### To clone the goals

1. Ensure that you have the **Cone Goal** page displayed.

Latitude Goal Wizard	
Clone Goal This page allows you to define parameters for the goals to be cloned fro	om.
From which month(s) would you like to clone goals?	
Choose Month 👻	
Choose Year 👻	
Advanced Calculation Options	
Use # of Posting Days to calculate goal.	
Increase Goal By 10 Percent	
Decrease Goal By 10 Percent	
< Back	Next > Cancel

Choose Month: Month from which to clone goals.

Choose Year: Year from which to cone goals.

**Use # of Posting days to calculate goal:** If selected, set the goal using the calculated the number of posting days in the month. If cleared, set the goal using the number of posting days in the cloned month.

Increase Goal by: If selected, increase the cloned goal based on the specified percent.

[Increase] Percent: Percent to increase the cloned goal.

Decrease Goal by: If selected, decrease the cloned goal based on the specified percent.

[Decrease] Percent: Percent to decrease the cloned goal.

2. Complete the information and then click Next.

#### Set the Goals

Use the **Goal Worksheet** page of the **Goal Wizard** to set the goals for company groups and desks. You can modify the goals on this page or export the data, modify it, and import it back into the Goal Wizard. If you indicated on the **Previous Goal Information** page that you want to set the same goals for all companies and desks, you can modify the amounts as necessary.

#### To set the goals

1.	Ensure that you have the <b>Goal Worksheet</b> page displayed.
----	--

Goal Type	Goal Name	Goal Month	Branch	Posting Days	Gross Goal	Fee Goal
Company	Catch-All Goal G	04/01/2014	00000	0	100000.00	10000.00
Company	Catch-All Goal G	1	00001	0	100000.00	10000.00
Company	New Customer	04/01/2014	00000	0	100000.00	10000.00
Company	New Customer	04/01/2014	00001	0	100000.00	10000.00
Company	My customer gr		00000	0	100000.00	10000.00
Company	My customer gr		00001	0	100000.00	10000.00
Desk	ADMIN 1 DESK	04/01/2014		0	100000.00	10000.00
Desk	COLLECTOR 1	04/01/2014		0	100000.00	10000.00
Desk	NEW BUSINESS	04/01/2014		0	100000.00	10000.00
Desk	POD COLLECTO	04/01/2014		0	100000.00	10000.00
Desk	DIALER APPEN	04/01/2014		0	100000.00	10000.00
Desk	DIALER MERGE	04/01/2014		0	100000.00	10000.00
Desk	DIALER NEW D	04/01/2014		0	100000.00	10000.00
Desk	WESTSIDE DES.	04/01/2014		0	100000.00	10000.00

- 2. To set the goals on this page, type the goal amounts in the **Gross Goal** and **Fee Goal** boxes.
- 3. To export the data to Microsoft Excel to modify it, do the following:

#### a. Click Export Grid to Microsoft Excel.

b. Specify the file location and name and then click **Save**.

c. Open the file in Microsoft Excel, modify the data, and then save the file. You can now import the data into the **Goal Wizard**.

4. To import data from Microsoft Excel, do the following:

#### . Click Import Microsoft Excel Worksheet.

- a. Select the file to import and then click **Open**.
- b. The system updates the data grid to reflect the modified data.
  - 5. Click **Next** and then click **Finish**.

# **Goal Dashboards**

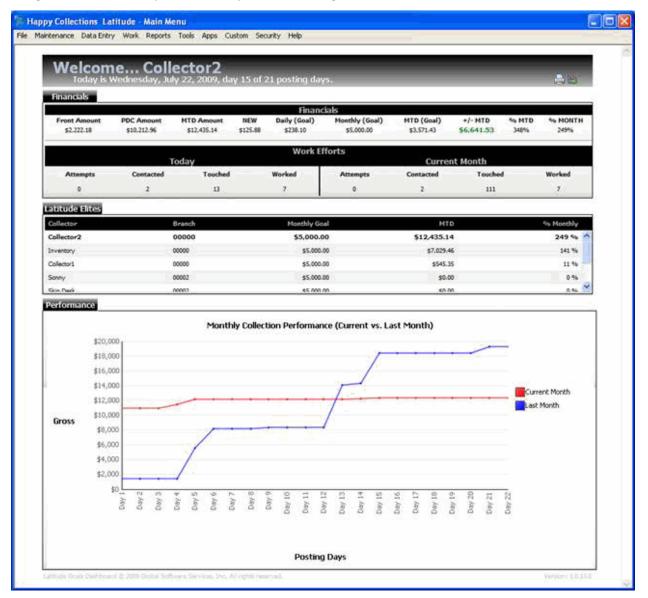
# **Goal Dashboards**

Dashboards display as the background for the **Main Menu** window in Latitude. Your organization specifies whether to display dashboards using the Welcome Web Page permission in Latitude. The information displayed to the logged on user is based on the role assigned to the user.

**Note:** To avoid errors in the dashboard, ensure that your organization set the posting days, company goals, and desk goals.

# **Collector Dashboard**

The Collector Dashboard displays for users who have a desk assigned to them and who are not designated as a team supervisor or department manager in Latitude.



#### **Financials**

Front Amount: Payment dollar amounts that the collector posted for the month.

**PDC Amount:** PDC dollar amounts that the collector added for the month.

MTD Amount: Total posted payments and PDCs that the collector added for the month.

**New:** Dollar amounts that the collector collected on the current date. If you selected the Gross view (using the View icon in the title bar) the amount includes payments and fees. If you selected the Net view, the amount includes fees only.

**Daily (Goal):** Collector's daily goal adjusted as the monthly gross goal divided by the number of posting days for the month.

Monthly (Goal): Collector's monthly gross goal.

**MTD (Goal):** Pro-rated amount for the collector to collect today, based on the current date in relation to the monthly goal and number of posting days.

+/- MTD: Pro-rated percentage of the goal to collect today, based on the current date in relation to the monthly goal and number of posting days.

% MTD: Pro-rated percentage of the goal reached currently for the entire month.

% Month: Straight percentage of the goal reached currently for the entire month.

#### **Work Efforts**

**Attempts:** Number of times the collector attempted to contact the account on the current date and the current month.

**Contacted:** Number of times the collector contacted the account on the current date and the current month.

**Touched:** Number of times the collector touched the account on the current date and the current month.

**Worked**: Number of times the collector worked the account on the current date and the current month.

These numbers are based on action and result codes added to account notes in Latitude.

#### **Latitude Elites**

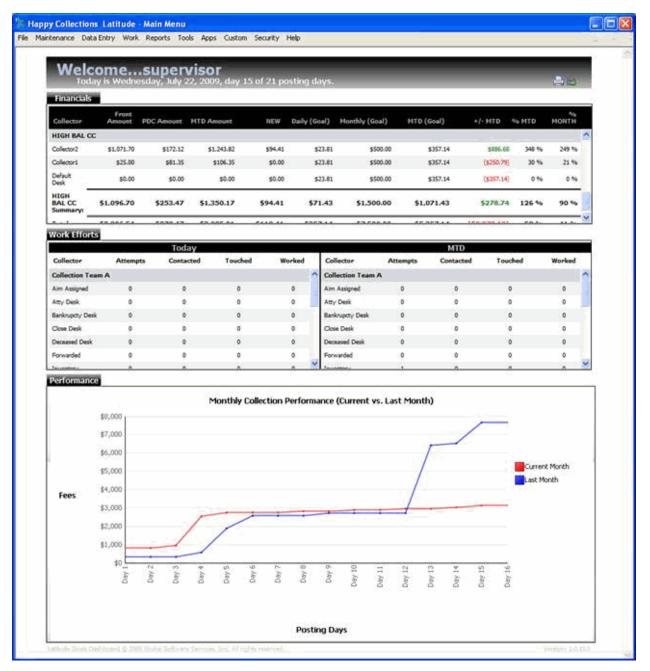
Collector ranking based on the percentage of the monthly goal reached, in order. Information in bold signifies the currently logged on collector.

#### Performance

Amounts collected during the current and previous month, represented in a line graph.

# **Supervisor Dashboard**

The Supervisor Dashboard displays for users who are designated as a team supervisor in Latitude. Subtotals display for each team and grand totals display for all teams assigned to the supervisor.



#### **Financials**

Front Amount: Payment dollar amounts posted for the month.

PDC Amount: PDC dollar amounts added for the month.

MTD Amount: Total posted payments and PDCs added for the month.

**New:** Dollar amounts collected on the current date. If you selected the Gross view (using the icon in the title bar) the amount includes payments and fees. If you selected the Net view, the amount includes fees only.

**Daily (Goal):** Daily goal adjusted as the monthly gross goal divided by the number of posting days for the month.

Monthly (Goal): Monthly gross goal.

**MTD (Goal):** Pro-rated amount to collect today, based on the current date in relation to the monthly goal and number of posting days.

+/- MTD: Pro-rated percentage of the goal to collect today, based on the current date in relation to the monthly goal and number of posting days.

% MTD: Pro-rated percentage of the goal reached currently for the entire month.

% Month: Straight percentage of the goal reached currently for the entire month.

#### **Work Efforts**

**Attempts:** Number of times a collector attempted to contact the account on the current date and the current month.

**Contacted:** Number of times a collector contacted the account on the current date and the current month.

**Touched:** Number of times a collector touched the account on the current date and the current month.

**Worked**: Number of times a collector worked the account on the current date and the current month.

These numbers are based on action and result codes added to account notes in Latitude.

#### Performance

Amounts collected during the current and previous month, represented in a line graph.

#### **Manager Dashboard**

The Manager Dashboard displays for users who are designated as a department manager in Latitude. Subtotals display for each department and grand totals display for all departments assigned to the manager.



#### **Financials**

Front Amount: Payment dollar amounts posted for the month.

PDC Amount: PDC dollar amounts added for the month.

MTD Amount: Total posted payments and PDCs added for the month.

**New:** Dollar amounts collected on the current date. If you selected the Gross view (using the icon in the title bar) the amount includes payments and fees. If you selected the Net view, the amount includes fees only.

**Daily (Goal):** Daily goal adjusted as the monthly gross goal divided by the number of posting days for the month.

Monthly (Goal): Monthly gross goal.

**MTD (Goal):** Pro-rated amount to collect today, based on the current date in relation to the monthly goal and number of posting days.

+/- MTD: Pro-rated percentage of the goal to collect today, based on the current date in relation to the monthly goal and number of posting days.

% MTD: Pro-rated percentage of the goal reached currently for the entire month.

% Month: Straight percentage of the goal reached currently for the entire month.

#### **Work Efforts**

**Attempts:** Number of times a collector attempted to contact the account on the current date and the current month.

**Contacted:** Number of times a collector contacted the account on the current date and the current month.

**Touched:** Number of times a collector touched the account on the current date and the current month.

**Worked**: Number of times a collector worked the account on the current date and the current month.

These numbers are based on action and result codes added to account notes in Latitude.

#### Performance

Amounts collected during the current and previous month, represented in a line graph.

# **Owner Dashboard**

The Owner Dashboard displays for users assigned the permission to display the owner page. The dashboard includes two tabs: Company Customer Goals and Graphical. Custom customer groups only appear in the dashboard when users apply funds to that customer group, even if a goal exists for the customer group.

#### **Company Customer Goals**

The following example shows the **Company Customer Goals** tab selected.

Company Goals Today is Manday, May 19, 2008, day 13 of 21 posting days.								
Customer Group	Collection	Hoethly Goal	Daily Goal	MTD Goal	HTD DAT HT	D Percent Hunt	bly Personal	
	1.1980 (11.194) (2.1	A REPRESENTATION	100000000000000000000000000000000000000	TAXABLE FOR	er en	100-		
© Cirl					420.079.711.78	2%	1%	
DAVED		\$34,470,000.00			-\$20,677,951.48	3%	2%	
Oemo Group		\$33,150,000.00			-\$20,079,711.78	2%	1.46	
HouseHold	\$49.037.303.07	\$713,440,000.00	\$34,068,571.43	\$442.891.428.37	-6793,654,125-50	11%	7%	
Oustomer	Branch	Collection	Honthly Goal	Daily Goal	MTD Goal MTD 0	dfMTD PercentMunt	hly Percent	
HOUSE HOLD	BANK CARDFL	\$16.345.767.69\$2	28,480,000.00\$11	.356.190.48\$147.	630,476.19-8131,384.708	50 11%	7%	
HOUSE HOLD	BANK CARDCORP	\$16.345.767.6952	38,490,000.00511	.356.190.48\$147.	630.476.19-\$121,254.708.	50 31%	2%	
HOUSE HOLD	BANK CARDGA	\$16.345.767.69\$2	38.480.000.00511	.356.190.489147.	630.476.19-5131.284.708.	50 31%	2%	
- HSBC	\$34.092.063.03	\$536,790,000.00	\$25,561,428.57	\$332,298,571.43	-3296.206.308.40	10%	6%	
Cestomer	Branch	Collection	HustNy Coal	Daily Goal	HTD Goal HTD D	If HTD Percent Hunt	bly Percent	
HOUSE HOLD	BANK CARDFL	\$11,364,021.015	178,930,000.00 \$8	1,520,476.195110	766.190.42- <b>199.402</b> ;169.4	10%	6%	
HOUSE HOLD	BANK CARDGA	\$11.364.021.015	178.930.000.00 \$4	.520.476.195110	766.190.48-199.402.169.4	0 10%	6%	
HOUSE HOLD	BANK CARDCORP	\$11,364.021.015	178.930.000.00 \$8	.520,476.195110	766.190.48 -199.402.109.4	10%	6%	
IDT Corp	\$12,308,700.66	\$528.150.000.00	\$25,150,000.00	\$326,950,000.00	-4314,641,299,34	4%	2%	
The Master Group	\$4,054,038.66	\$452,100,000.00	\$21.528.571.43	\$279.871.428.57	-1275.017.509.91	1%	3.96	

**Collection:** Total amount collected for the current month by customer goal group.

Monthly Goal: Goal set for the customer goal group.

**Daily Goal:** Adjusted goal amount to collect by group (monthly goal divided by the number of posting days).

MTD Goal: Pro-rated amount to collect for the current month.

**MTD Diff:** Month-to-date difference between the goal and actual amounts. If the group is below goal, the amounts display in red. If the group is above goal, the amounts display in black.

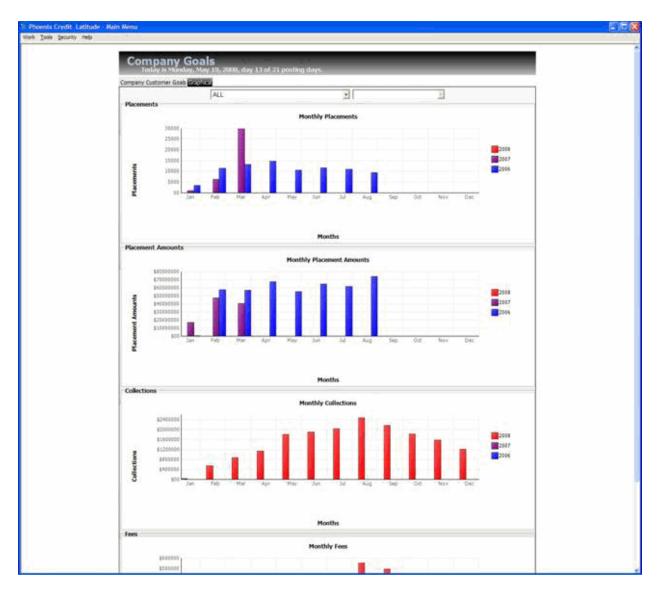
**MTD Percent:** Pro-rated percentage of goal reached currently for the entire month.

Monthly Percent: Straight percentage of goal reached currently for the entire month.

# Graphical

The following example shows the **Graphical** tab selected. It is a graphical representation of account placements, placement dollar amounts, collection amounts, and fee amounts by month and year. It includes data for a three-year period.

**Note:** This tab reflects custom customer groups in Latitude, not the company groups your organization created in Goal Manager.



# **Print the Dashboard**

Use the Print icon in the dashboard title bar to print the dashboard displayed currently.

#### To print the dashboard

- 1. In the dashboard title bar, click the Print icon. The **Print** dialog box appears.
- 2. Specify the print settings and then click **Print**.

# **Specify the Dashboard View**

Use the View icon in the dashboard title bar to specify whether to display net amounts (fees collected) or gross amounts (total amounts collected).

**Note:** Fees are based on the customer fee schedule set for the accounts, not the collector fee schedules.

#### To specify the dashboard view

- 1. In the dashboard title bar, click the View icon. If you set the view to gross, the view changes to net. If you set the view to net, the view changes to gross.
- 2. Click the View icon to switch back and forth between gross and net views.