Goal Manager

Printable Help

Version 2020 R1

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Abstract

This document is a printable version of Goal Manager help.

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Table of Contents

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.
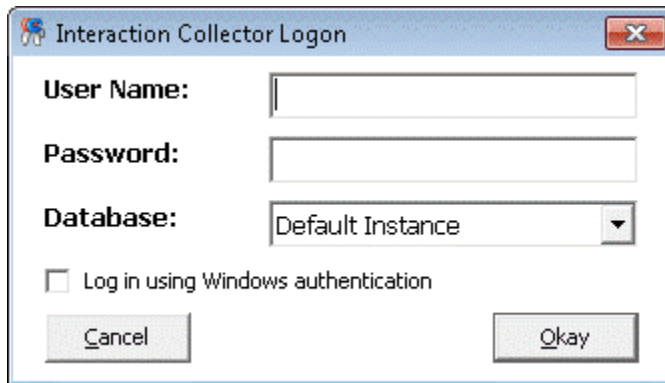
Log on to Goal Manager

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.

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.
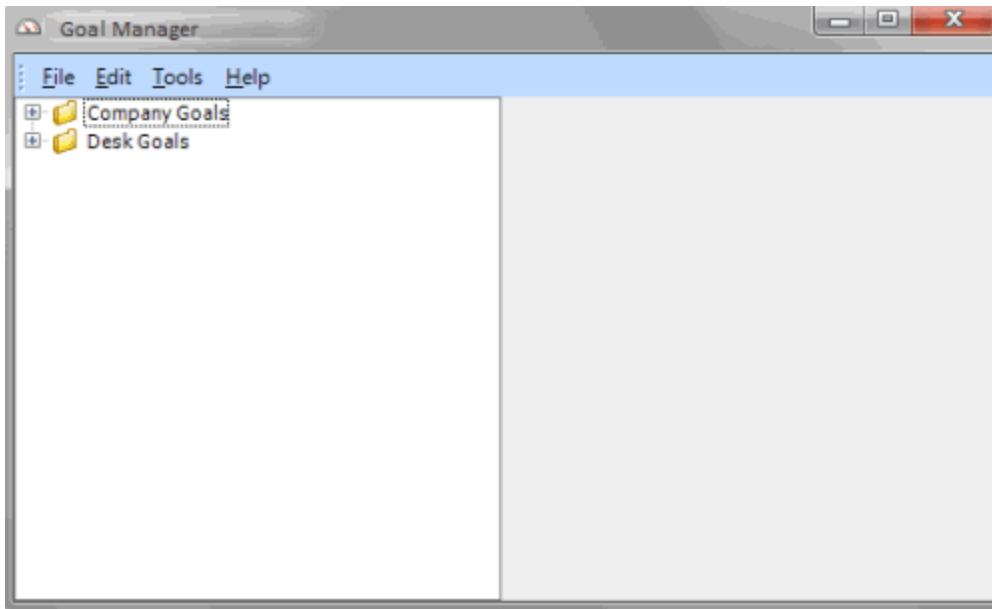
Overview of Goal Manager Window

Use the **Goal Manager** window to view the goals that your organization set.
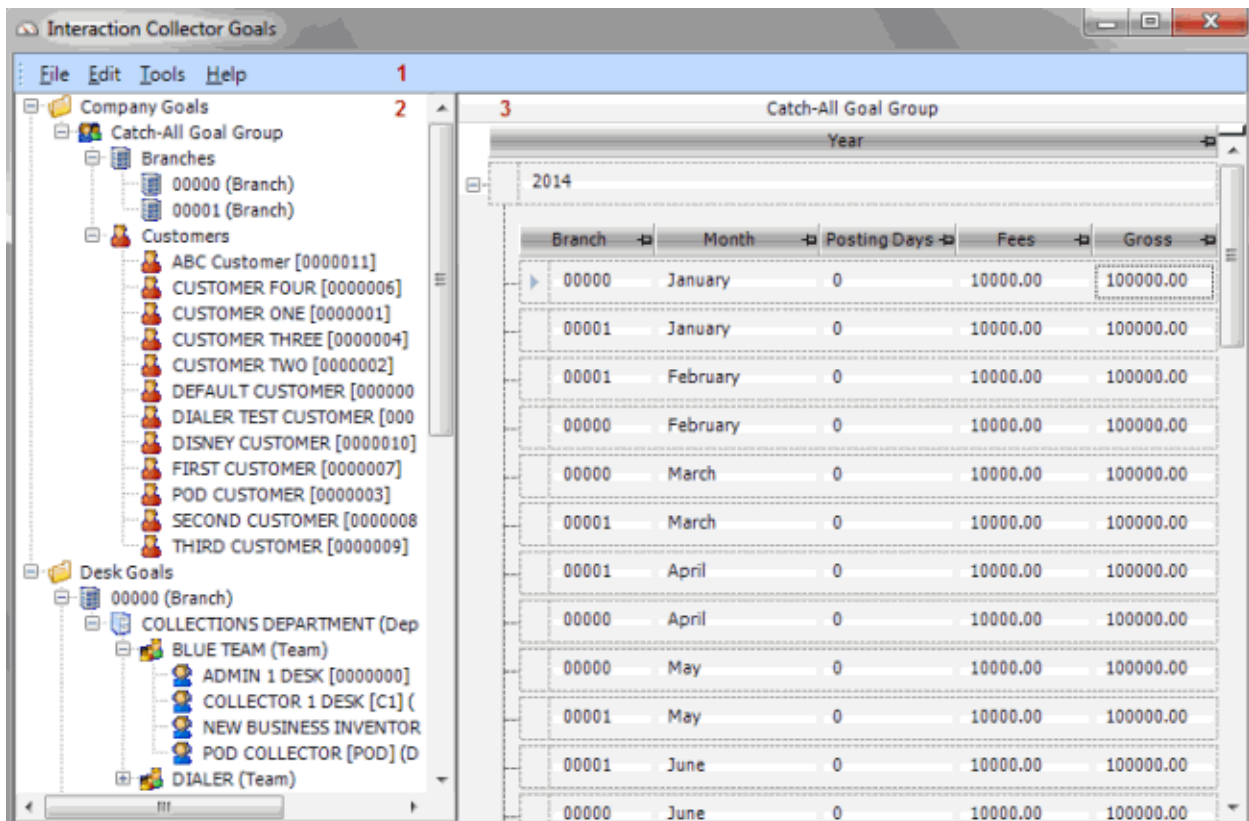
1. **Menu bar**: Displays available menu options and commands for the window.

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.
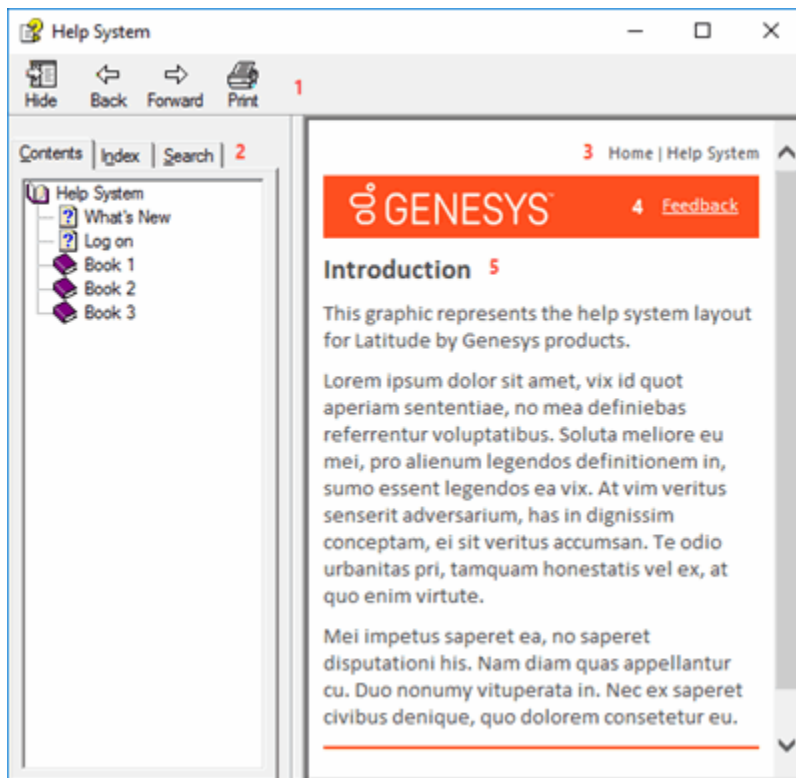
3. **Information pane:** Displays the goals for the category selected in the **Navigation Explorer** pane.

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 search feature. 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 set of rules. You can include wildcard expressions, Boolean operators, and nested expressions 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).
Topics that contain all the words specified, in any order or placement within the topic	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
Topics that contain the specified phrase	"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 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..."
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.
NEAR	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.

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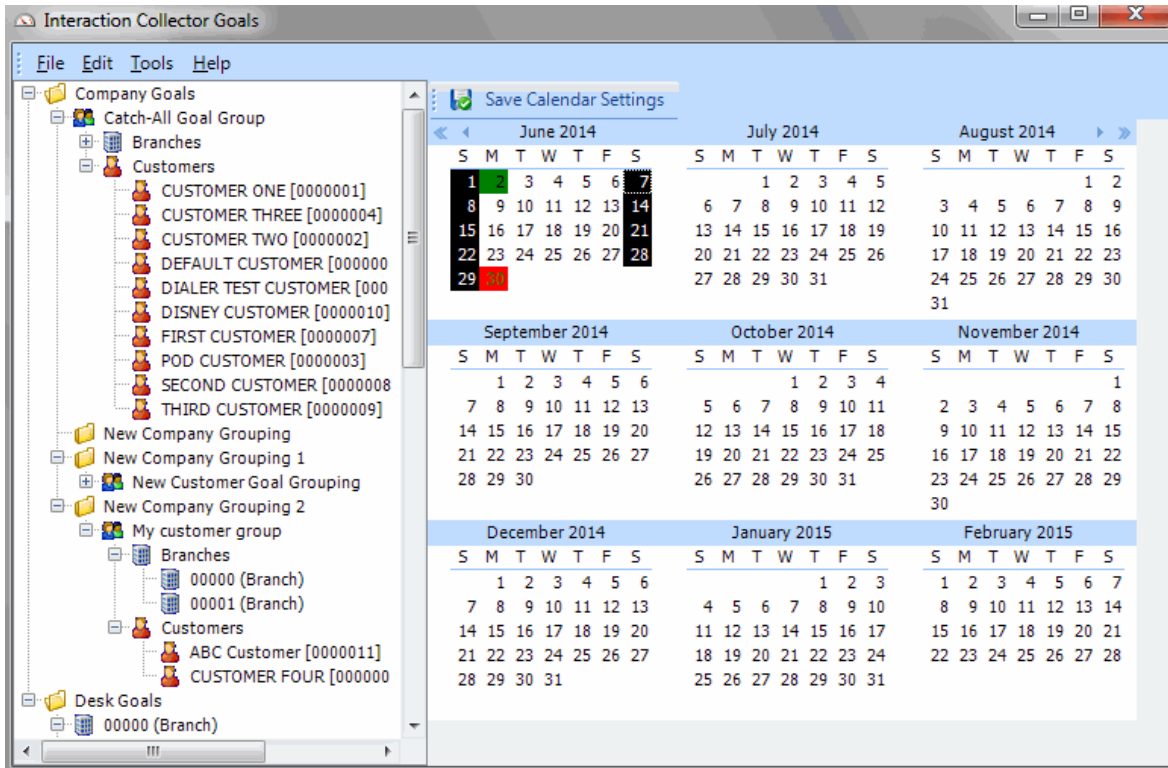
Color	Menu Option	Description
Black	Toggle Posting Day	Non-posting day
Green	Toggle First Day of Month	First posting day
Red	Toggle Last Day of Month	Last posting day

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**.
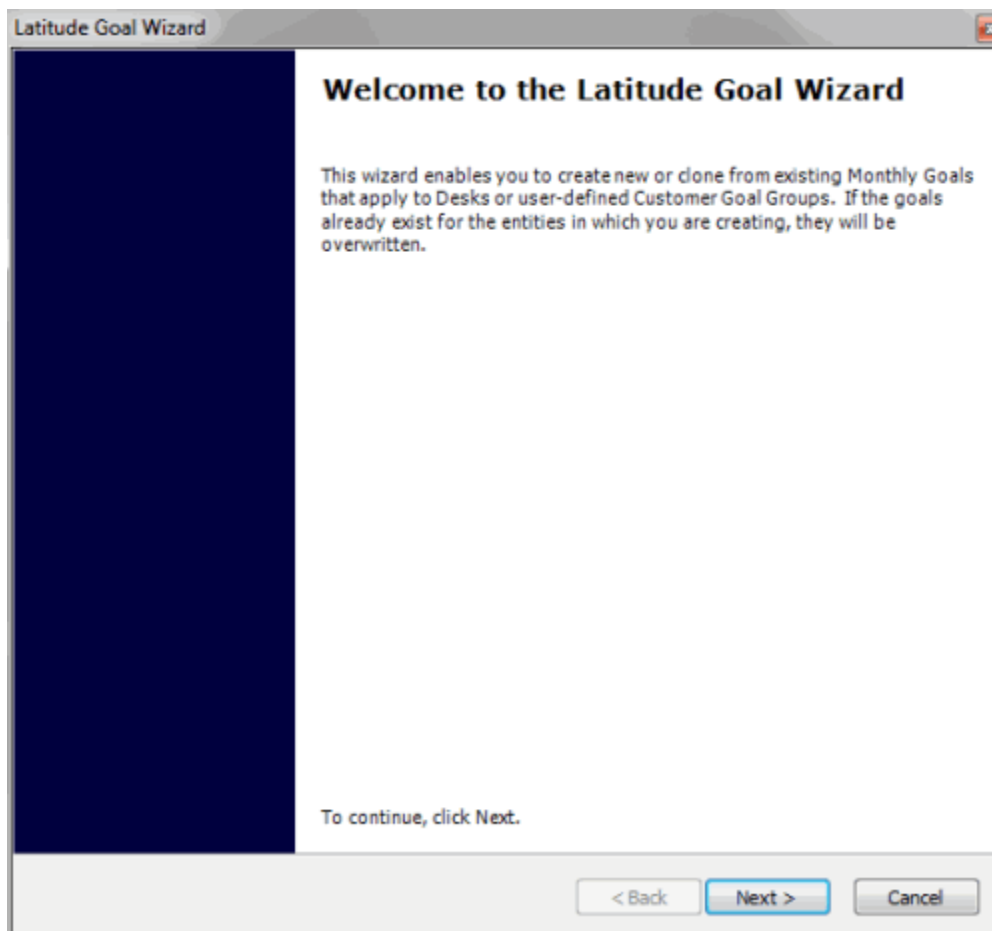
Goal Wizard

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.

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.

     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.
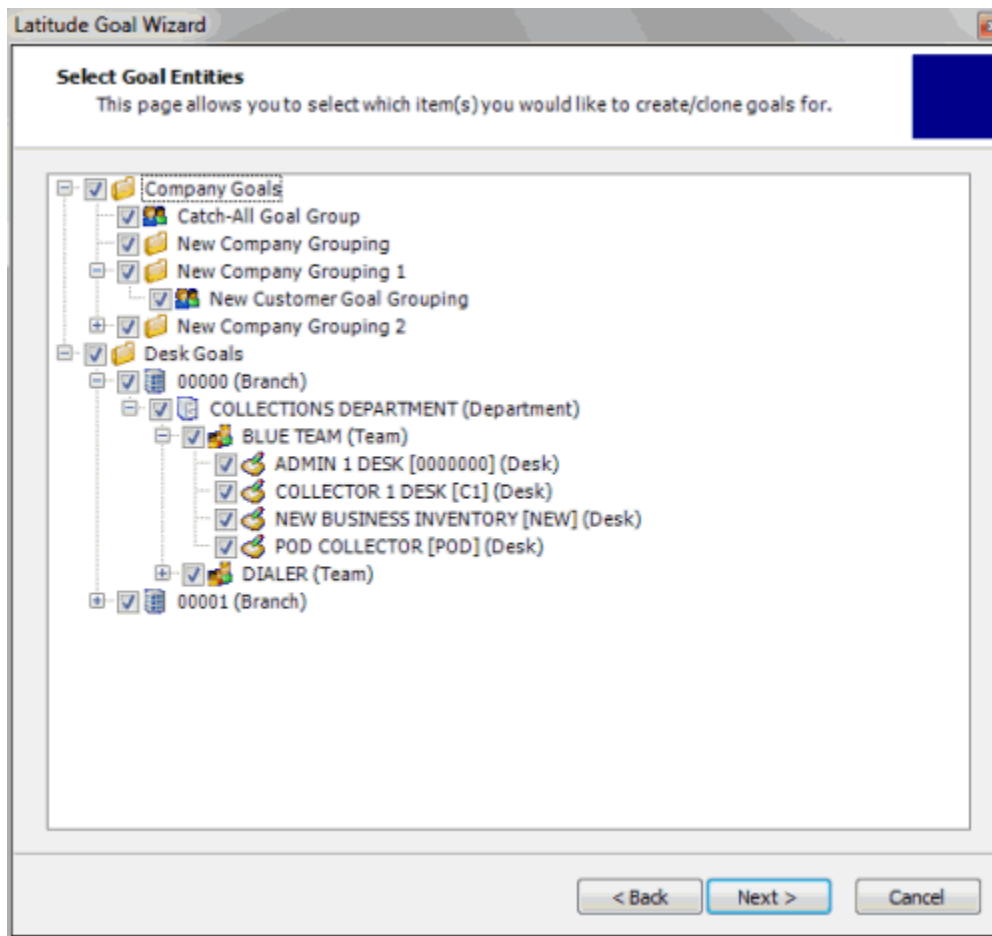
2. To set goals for companies, do one of the following:

   - 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.

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.

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 **Goal Worksheet** page displayed.

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.
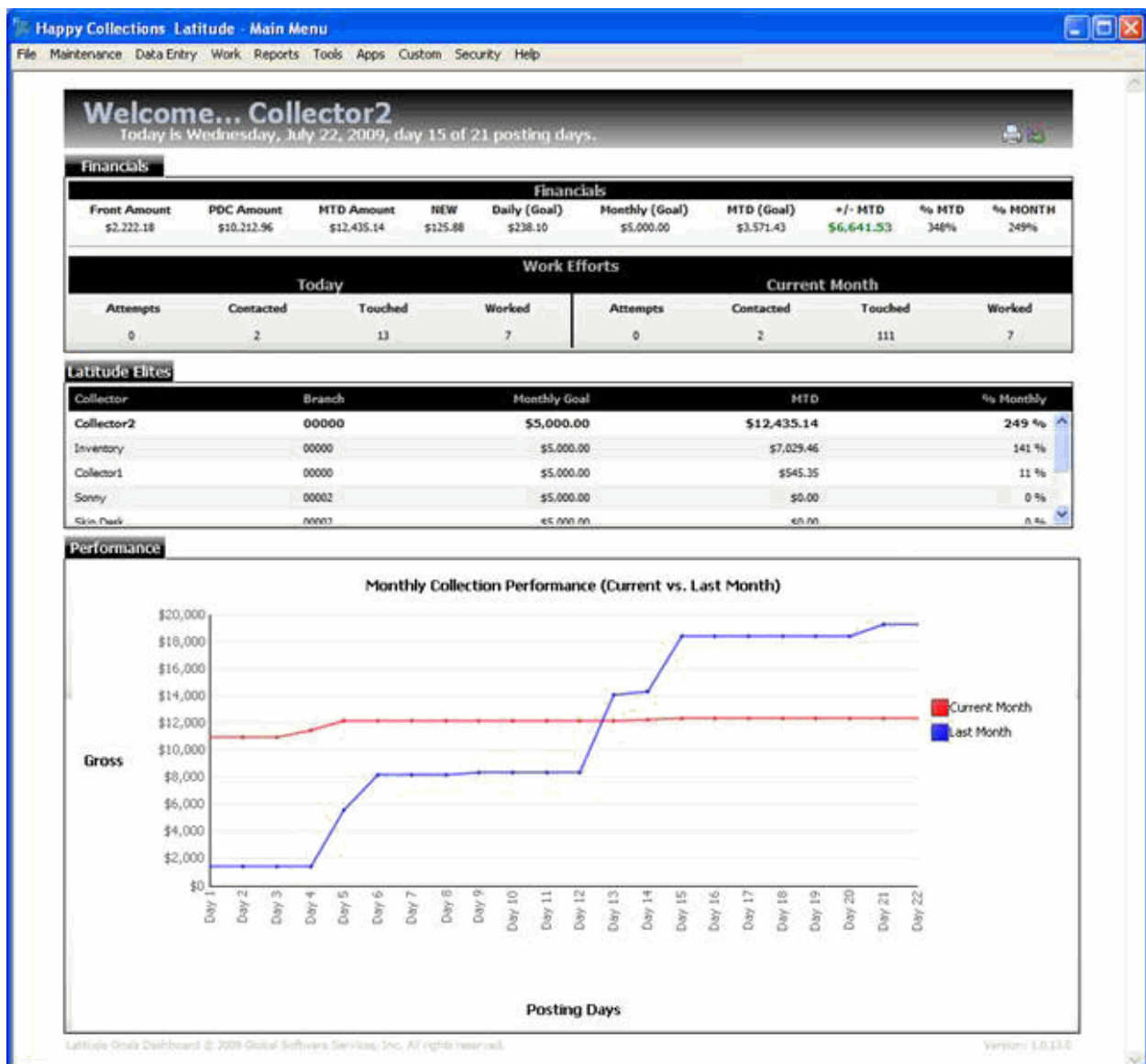
Financials

> **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.
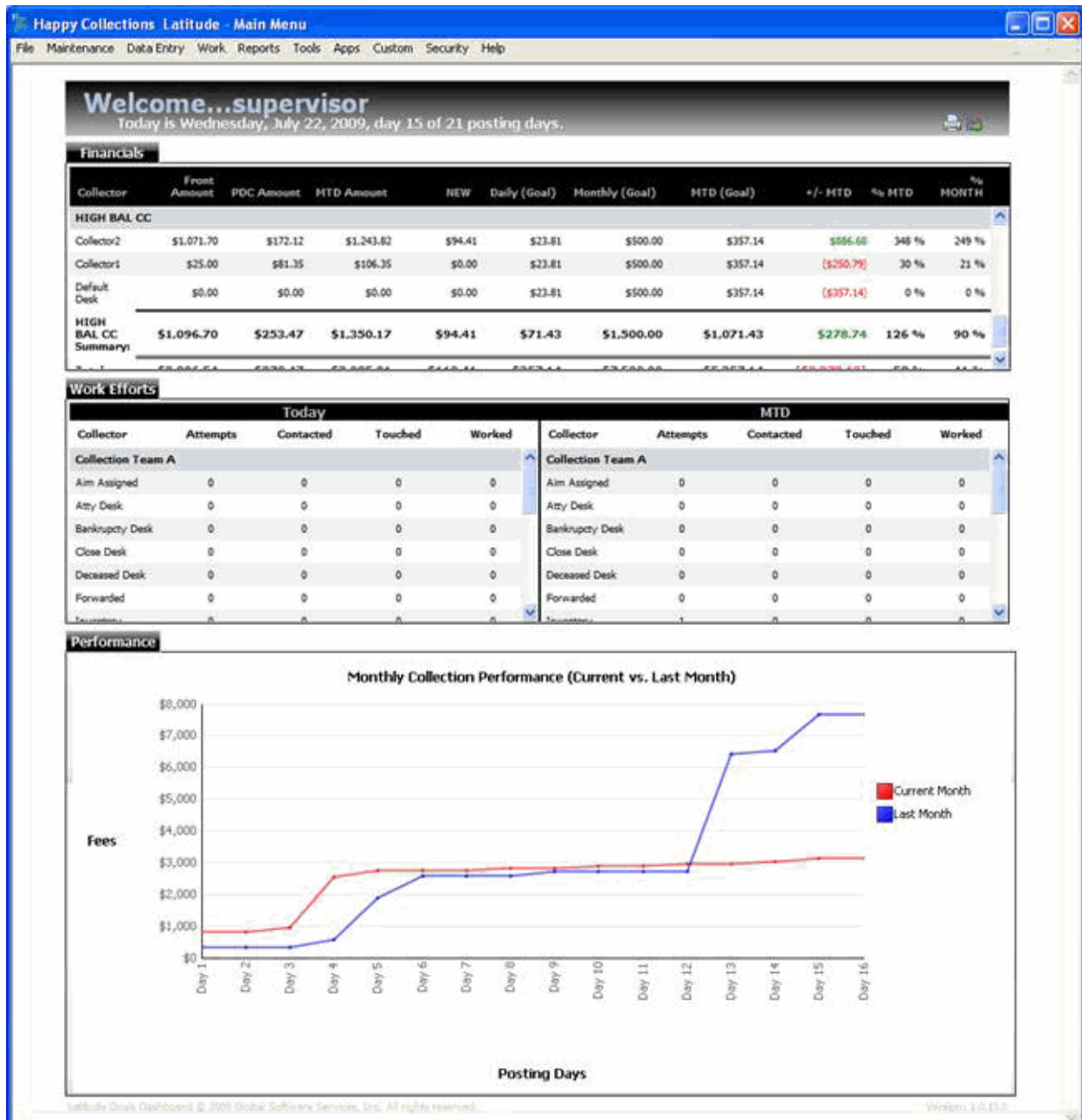
Latitude Elites

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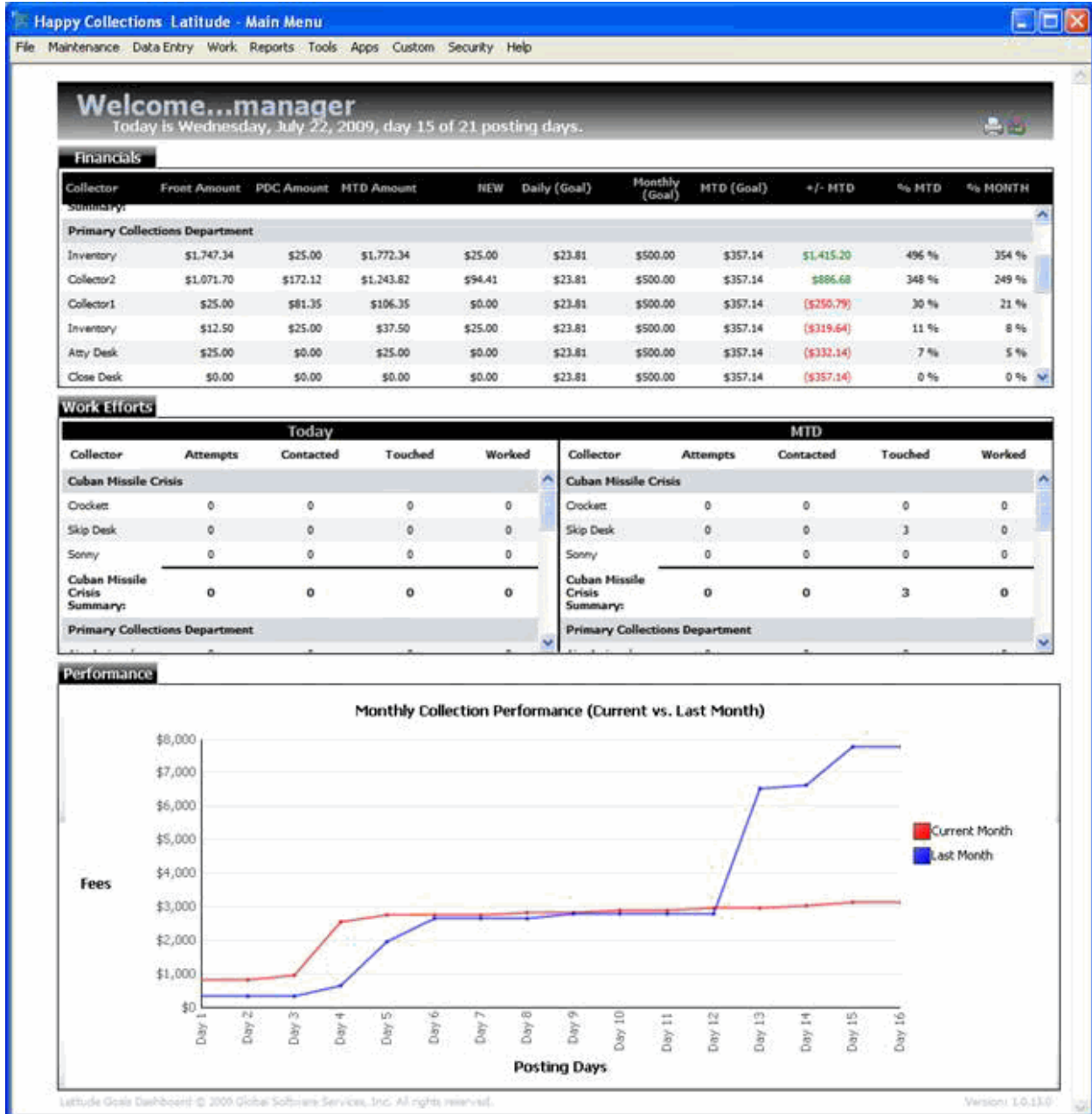
These numbers are based on action and result codes added to account notes in Latitude.

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.

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.
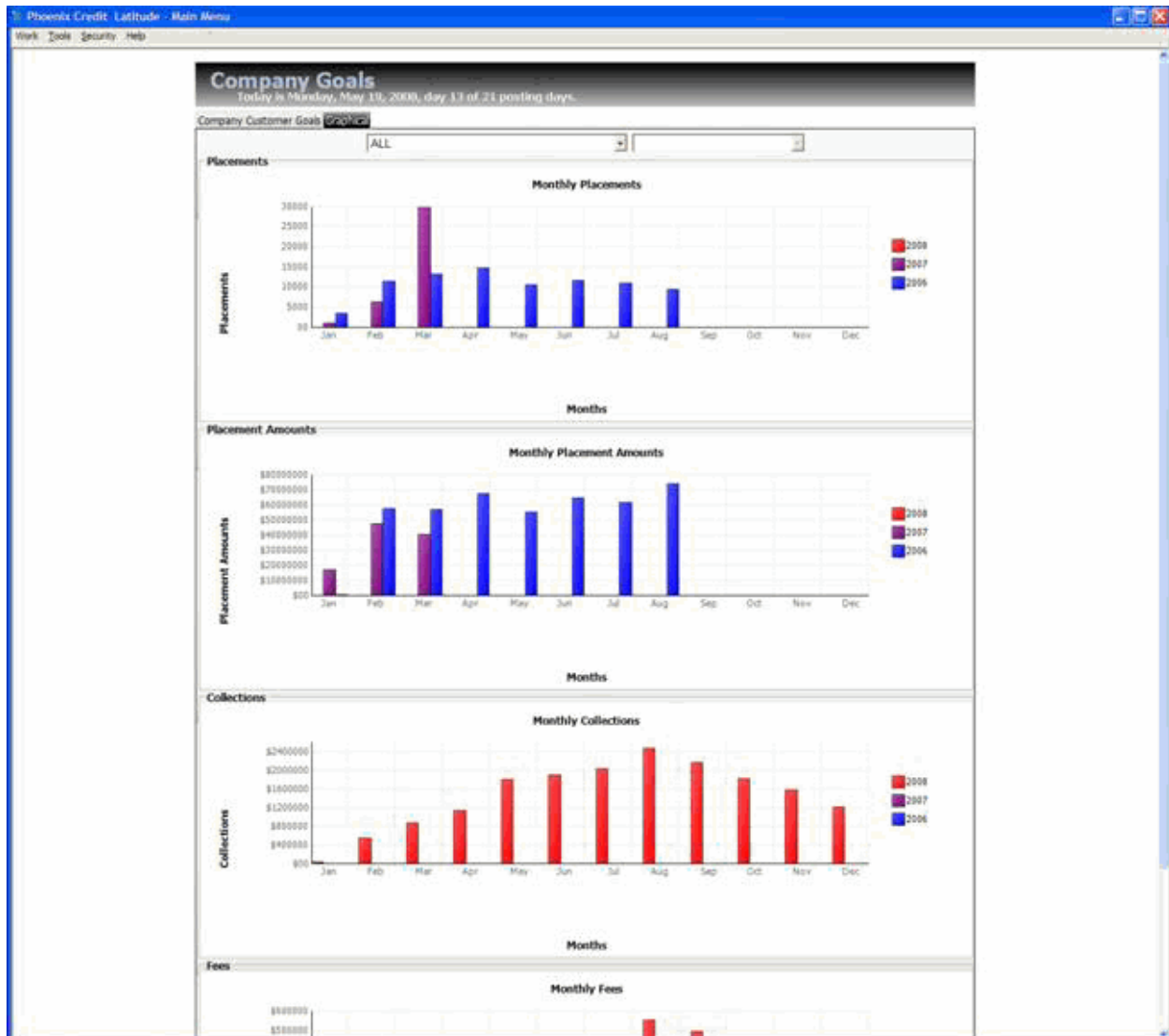
Print the Dashboard

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.