Organizing Targets In TargetWatch
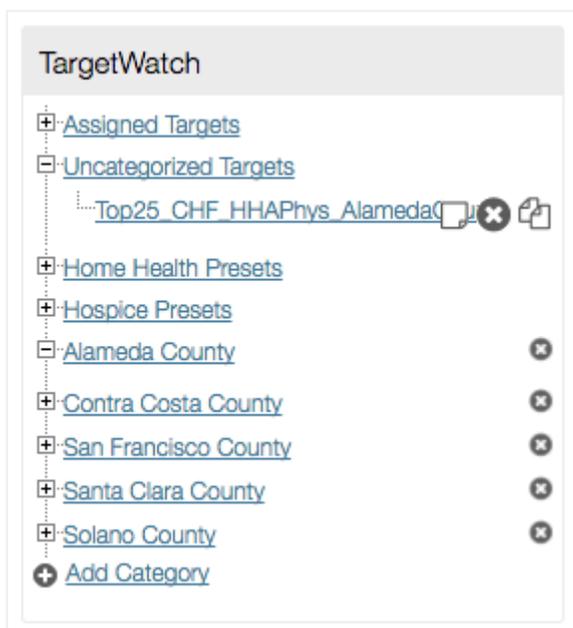
One of the more powerful features of TargetWatch is the ability to create, save, and recall targeted data sets. This article discusses where targets are listed after they are saved, and how to organize them for easier navigating.
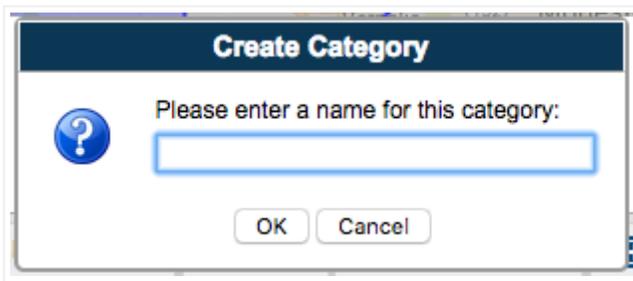
Locating Saved Targets

When a target is saved, it becomes available in the *TargetWatch* box, which is located at the bottom of the column on the left side of the TargetWatch page. *The TargetWatch* box contains several folders (below), and all new targets are added to the *Uncategorized Targets* folder.

In the above example, the *Top25_CHF_HHAPhys_AlamedaCounty* target was recently created. Based on the sales territories this organization services, new category folders were created to make it easier to locate targets for future reference.

Creating New Category Folders

At the bottom of the *TargetWatch* box is an *Add Category* link. Adding new categories creates a new folder for organizing targets. When the link is clicked, the *Create Category* window appears (pictured below).

Once a name has been entered, clicking *OK* will add the folder to the *TargetWatch* box. A confirmation box appears that the category has been created and needs to be dismissed before continuing to work in TargetWatch.

Tip: While this example shows categories that were created based on sales territories, any naming convention can work. Some organizations may create a category for all Top 10 targets, or another might create a category for targets specific to each line of business (HHA, Hospice, etc.). The purpose is to create categories that make it easier to locate the desired targets.

Moving Targets Between Categories

Since all targets initially start off in the *Uncategorized Targets* folder, it's important that they are easy to move. To move a target, click and drag the target link to the desired folder in the *TargetWatch* box. A black box will appear around each folder when the link is dragged over it. Once the the desired folder is showing as selected, release the link, and it will appear in the new folder.