Programming New Action Plans

If you wish to create a new Action Plan inside WorkCenter, you have two options:

Option #1: Right click on an Action Plan and select "Duplicate Item". You will now see a new Action Plan created and it will be named "Copy of…". You will now need to open this plan by double clicking on the action plan and editing the plan. This process is explained in the video: <u>Action Plans - #2 – Editing Existing Action Plans.</u>

You can rename the plan and also edit the plan by double clicking on the plan title. The Action Plan will appear for your editing.

You will need to mark this plan as "Active" if you wish to use the plan. You will also need to tie this Action Plan to a Contact List Manager List and add contacts to that list for the plan to operate.

Option #2: Create a new Action Plan: To do this follows these steps:

Step #1: At the Management tab view, click on the "+" icon located at the bottom of the screen. A new Action Plan will appear.

Step #2: Name the plan and description by typing into the appropriate boxes. For this example, we will create an Action Plan called: Refinance Campaigns and the description with be "Loans in Excess of 6%".

Step #3: Adding the steps to your Action Plan. Click the "+" icon again and you will see a line appear. Complete the line for the appropriate steps as we are doing in this video.

Step #4: Adding additional steps to the Action Plan: Follow the same process as explained above by clicking on the "+" and the second step will appear. For the delay column, set the number of days from the previous action plan steps for when you wish this step to occur.

Step #5: Complete the steps, mark the box "Active" if you wish to use it and click the "OK" button to save your changes. You will now need to tie a Contact List Manger List to this plan and add contacts to be able have the plan process your desired objectives.