

Items to Know and Avoid When Creating and Using Action Plans 1 of 2

We are constantly getting compliments from our WorkCenter users on the marketing power, flexibility, automatic processes and ease of use incorporated within the Action Plans. As a user of WorkCenter, you have the ability to have an unlimited number of Action Plans to accomplish your major tasks, client communications, follow up campaigns and prospect marketing. This flash video will give you additional tips and suggestions on creating and using Action Plans. It will also give you informational tips along with processes you need to understand allowing you to maximize your actions and avoid some common mistakes that can occur with automated processes.

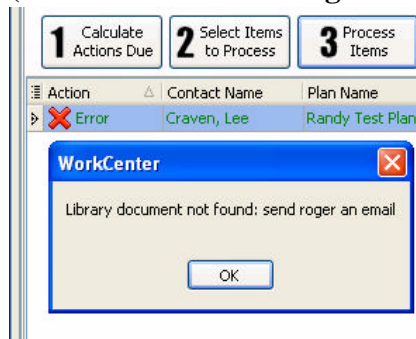
Items to Avoid when creating an Action Plan:

#1: Action Plans allow you to designate letters and emails in your WorkCenter library of forms to be printed or emailed to your designated recipients. Make sure that you do not have any identical named letters or emails in the same main heading or groups in your library of forms. To further explain this, if you have a letter named “Client Survey Letter” under your “Applicants” group heading, make sure you do not have a second letter under this group heading with that same name. It is OK to have the same or identically named letter or email under another group heading.

#2: Action Plan steps that show a letter or email must have the email or letter attached and located in your library of forms and documents. For example, let’s say one of your action plan steps is to send the “Client Approval Letter” found under the “Applicant Group Heading” to your recipient. When you create the plan, make sure you click the down arrow and select that letter under the Letter Name/Description column in your action plan. If you use an email or letter under the action tab and do not link this to the appropriate document, you will create an error when you run your action plan.

#3: If WorkCenter is unable to process your action step due to not finding the letter or email, you will get a pop up box explaining the error and also WorkCenter will automatically log this step with an ERROR MESSAGE with a large Red X.

(Memo – to show to Roger for creating the video only)



At this point, you should resolve your error message by these procedures. First you should click on the Calculate Actions Due button to reset your action plan step. Now you will have two options available to you:

Option #1: Open the Action Plan that is associated with this error message and correct the step. For this example, we will open the Action Plan and you can see that we do not have a letter assigned to this step. We made an error creating the action plan and typed a message telling us to send a letter. We should have linked a letter to this plan or we should have used a “Task” action step and not a “Letter” action

step. For this example, we really meant to link a letter so we will click into the box under the “Letter Name/ Description” column.

Option #2: You can right click on the unprocessed action step and select the option “Mark as Completed”. Select YES to the option pop up box. This plan step will not appear again, but the contact record and appropriate journal item will be recorded allowing WorkCenter to continue with the future action plan steps in this plan.

As explained in other flash videos, Action Plan steps need to be processed in order for the next step to run. To further explain this, if you select a step for printing a letter or emailing a document, this letter needs to be sent to the printer and the email needs to go through your Outlook system. If you cancel either of these steps, the action step will not record as completed and future action plan steps will not occur in this Action Plan.

For more information, please refer to our WorkCenter Quick Start Reference Guide or view the additional flash videos.