

Processing Action Plans

In previous flash videos pertaining to Action Plans, we have learned the following:

1. How to create new and mark Action Plans as Active
2. How to edit existing Action Plans
3. How to tie Contact List manager Lists to Action Plans
4. and how to Add Contacts to these lists to run Action plans

This flash video will cover the processing of Action Plans. Open your Action Plan Tab and select the “Processing Tab” with a single mouse click. You will notice these three tabs at the top of the screen:

1. Calculate Actions Due
2. Select Items to Process
3. Process Items

For this example, we will only have only two contact records in our list associated with this Action Plan. The Action Plan will also have a printed letter, an email and also a calendar scheduled item.

Step #1: You will start the Processing of your Action Plans by clicking on the first tab: Calculate Actions Due. As we discussed in previous videos, the Action Plan must be checked as “active” in order for WorkCenter to process and run the Action Plan. You might also note that there may be items waiting to be selected showing in this “Calculate Actions Due” tab. We suggest that you click on the tab regardless of any items that may be displayed. If you have just created an Action Plan and the delay is set to zero days, this action will calculate those items and display them in your screen.

As you can see by the screen, we have 6 items ready to be processed. Two letters, two emails and two calendar schedule items.

Step #2: Click the second tab “Select Items to Process”. You will see a pop-up box appear giving you two options: #1 is to select all items and #2 will allow you to select items that are scheduled to be emailed, printed or placed on your calendar.

For this example, we will select “all items”. You will notice those items have now been highlighted and are ready to be processed.

Step #3: Process Items: click the process Items tab and the first action in our plan will commence. The first step in our plan was to print a letter. You can see WorkCenter opened the letter, populated the document with mail-merged data, and displayed it for our review. You also have the option to automatically send the letters to the printer or email your messages without reviewing them by programming those functions under TOOLS, SETUP OPTIONS and the ACTION PLAN TAB. We will print the letter and you will now notice the second letter appear for editing. After the letters have been completed WorkCenter will process the second step in this Action Plan and that is to send emails. Once the final email has been processed, WorkCenter will automatically place the calendar scheduled items on your calendar found under the “Schedule Tab”.

As we discussed in previous videos, all contact communications that go through WorkCenter are automatically entered into the Contact Journal Tab. This allows you the ability to track all letters, emails, calendar items and manually entered journals with a single mouse click. We will open one of the contacts used in this flash video and show you the Journal listings for this action plan.

For more detailed information about Action Plans, watch the other flash videos, refer to the WorkCenter Quick Start Guide and watch for notification from vForms about the upcoming WnR Seminars.