

Editing Existing Action Plans

It is easy to edit existing Action Plans inside your copy of WorkCenter. Open WorkCenter and then click on the Action Plan tab located at the top of the screen view. Click on the “Management Tab” and you will see the list of current Action Plans in your software.

To edit a specific Action Plan, double click on that Action Plan title. For this example, we will edit and modify the FSBO Action Plan. As you can see by the video, this FSBO Action Plan has three steps. They show as headings across the top and are:

1. Phone call
2. Letter
3. Phone call

You can also see across the top, Step #s, Action; Recipient; Letter name or description; and Delay.

Step #: this is the sequence or order in which the Action Plan is processed

Action: Refers to the actual action you have determined in this plan. It could be a letter, email, phone call Or calendar item to mention a few. Click into the box and select the down arrow for a list of actions

Recipient: This is the person who will receive the documents or actions when the plan is processed.

Letter Name or Description: This will refer to the library letter or email or message that will be used In your Action Plan.

Delay: The delay tells WorkCenter how many days from the previous action does this action take Place. For example in this plan, Step #2 will occur 2 days following Step #1.

Editing the Action Plan:

To edit existing items in the plan, click into the appropriate box and make your changes. If you wish to add steps to your Action Plan, click on the “+” box and a new line will appear. Complete the line item based on your desired results. If you wish to insert line items in the middle of your Action Plan, add a new line item and then use the up and down arrow icons to position the line item to meet your needs.

Activating your Action Plan: If you wish to activate this plan, you will need to check the “Active” box located at the top of the screen. You will also need to tie this Action Plan to a specific Contact List Manager List and add contacts to that list. See the other flash videos for these procedures or review the WorkCenter Quick Start User Guide.