Linking Action Plans to a Contact List Manager List

You will need to link a Contact List Manager List to an Action Plan in order to use that Action Plan. Before you link a list to the Action Plan, you must have the Action Plan created or use an existing Action Plan.

Step #1: Open your Contact List Manager Lists by clicking on the List Manger icon located at the top of the WorkCenter screen view. This icon has two people. Click on the icon and the Contact List Manger will appear.

Step #2: For this example, we will link the Closed Purchase Loans located under the Loan Status Group listing to the Post Closing Campaign Action Plan. Click the box with the "+" sign next to the Loan Status Group Name.

Step #3: Right click on the "Closed – Purchase List and select "Edit Item". A contact list screen will appear.

Step #4: Click the down arrow next to the Action Plan Line and select the "Post Closing Campaign" action plan. Once this is completed, click the "OK" box to accept these changes.

Step #5: If you wish to use this action plan, you will need to add contacts to this list and you will also need to make sure the "Post Closing Campaign" Action Plan is marked "Active".

For more details on using Action Plans, watch the additional flash videos or refer to the WorkCenter Quick Start User Guide.