

# Advanced Action Plan Training Session

## Important System Item Considerations:

WorkCenter Icons and Quick Key Strokes (F5-refresh; F4-sync; F9-scripts, Ctrl Alt “S”)  
Backup your database before you make any significant changes to the data!

## System Setup Options:

Backup Folders – Document Folders  
Use of the “YES” Automated Loan Status Lists  
Action Plan Setup Tab – Mark “YES” to View Emails and Letters

## WorkCenter CRM – Relational Database – Use of 3 Types of Contact Records:

Contacts - That have a loan or loans – Use for third party providers  
Contacts - That are associated with loans – Use for third party providers  
Contacts – “Aunt Mary”

## Contact List Manager Lists:

Calyx Point & LOS Tracking Field Syncing to “Loan Status Lists automatically”  
Contact Birthday Lists – Automatic with LOS Sync  
Spouse Birthday Lists – Automatic with LOS Sync  
Adding Contacts/Loans to lists using reports - manually  
Adding Contacts/Loans to your Contact List Manager List – Drag and Drop - manually

## WorkCenter CRM Advanced Action Plan Options:

Action Plans using Trigger Fields: Email vs Mail Campaigns  
Birthdays  
Spouse Birthdays  
Anniversaries  
Loan Application Date – 1 step plan  
Loan Approved Date – 1 step plan  
Loan Closing Date – 1 or multiple steps plan  
“Date” driven Advanced Action Plans – Contact or Loan – “Trigger Fields”  
Loan Information sent to Third Party Providers  
Using “Restart” and “Remove” features in Action Plans  
Using the “Rate Review Email” in Action Plans

## **LIVE DEMO – CREATING AND RUNNING AN ACTION PLAN:**

### Contact Record Recommendations:

Display your email addresses – Front Screen – Screen your list before running your plan  
Use of Automatically Populating Lists:  
Dates: **Anniversaries**; **Contact Birthdays**; **Loan Status Lists**  
Manually adding contacts:  
Drag and drop from Contact Screen View  
Add Contacts from Reports

### **Live Demo on Contact Birthdays:**

This Action Plan uses a “Trigger Date Field”

This Action Plan contains an “Email” Step – make sure your contacts have an email address

If you use the “Spouse Contact Birthday” action plan, make sure the “Spouse” has an email address

You also need to modify one of the flyers for “Spouse\_FirstName”

The screenshot shows the 'Edit Plan' window for 'Contact Birthday'. The Plan Name is 'Contact Birthday' and the Description is 'Contact Birthday'. The Trigger Field is 'Contact Birthday'. There is an 'Active' checkbox which is unchecked. Below the fields is a table with the following data:

Step #	Action	Recipient	Letter Name / Description	Delay
1	Email	Contact	Flyers - Special Occasions   Birthday #1	0
2	Restart	Contact		5

### **Live Demo on Loan Status Approved Loans:**

This plan contains “email” steps – Make sure all contacts have email addresses

This plans sends an email to the “Selling Agent” – make sure your loan has the

Selling Agent attached to the loan record and the agent has an email address

The screenshot shows the 'Edit Plan' window for 'Loan Status - Approved'. The Plan Name is 'Loan Status - Approved' and the Description is 'Loan Has Been Approved'. The Trigger Field is empty. There is an 'Active' checkbox which is unchecked. Below the fields is a table with the following data:

Step #	Action	Recipient	Letter Name / Description	Delay
1	Email	Contact	Emails - In Process Emails   Loan Status Approval - Borrower	0
2	Email	Selling Agent	Emails - In Process Emails   Loan Status Approval - Selling Agent	0
3	Remove	Contact		60

### **Live Demo on Loan or 3<sup>rd</sup> Party Information in your Action Plan:**

The screenshot shows the 'Edit Plan' window for 'Rate and Term Campaign'. The Plan Name is 'Rate and Term Campaign' and the Description is 'Rate and Term'. The Trigger Field is empty. The 'Active' checkbox is checked. Below the fields is a table with the following data:

Step #	Action	Recipient	Letter Name / Description	Delay
1	Letter	Contact	Letters - Applicant   Rate and Term	0
2	Email	Processor	Letters - Applicant   Rate and Term -email	0
3	Remove	Contact		1

### **General Questions and Answers:**

Open Q&A period