Action Plan Basic Training Session

Important System Items:

Location and security of your WorkCenter database files
Database backup procedures and file location
WorkCenter Icons and Quick Key Strokes (F5-refresh; F4-sync; F9-scripts, Ctrl Alt "S")
Use the "Bookmarks" on user guide manuals
Backup your database before you make any significant changes to the data!

WorkCenter CRM Short Cut Keys:

F4 – LOS database syncing
F5 – Database refresh
F9 – WorkCenter scripts
Ctrl Alt "S" – Save

WorkCenter CRM – Relational Database – Use of Contacts:

Contacts - That have a loan or loans
Contacts - That are associated with loans
Contacts – "Aunt Mary"

System Setup Options:

Backup Folders
Documents Folders
Use of the "YES" Automated Loan Status Lists
Action Plan Setup Tab – Mark "YES" to View Emails and Letters
Use of Loan Status Lists in Action Plans

Contact List Manager Lists:

Calyx Point & LOS syncing to "Loan Status Lists"
Creating lists manually
Creating lists using reports
Linking lists to Action Plans
Adding Contacts or Loans to your Contact List Manager List

WorkCenter CRM Steps to Use Action Plans Effectively:

Data in your database must be accurate
Edit and create your library forms and documents
Create the Action Plan
Activate your Action Plan
Understand the use of the Contact List Manager Lists
Tie the Action Plan to a specific contact list manager list
Add contacts to your linked contact list manager list
Process your Action Plan

LIVE DEMO – CREATING AND RUNNING AN ACTION PLAN:

Contact Record Recommendations:

If the Action Plan uses emails, make sure all contacts have email addresses
If the Action Plan uses letters make sure all contacts have mailing addresses
You can see where your contact is regarding the Action Plan Steps in their Contact Record

How do I update Contact Records if I wish them to be on the same Action Plan Step:

Open the contact record
View the "Contact List Screen" by opening your contact record
Manually edit the list step and completion date – save your record

WorkCenter CRM – Editing an Existing Action Plan

Open and Edit
Duplicate an Existing Plan

WorkCenter CRM – Create & Run an Action Plan – Live Demo:

1. Edit and/or confirm letters and email documents
2. Create a new Action Plan
3. Activate the Action Plan
4. Create the appropriate Contact List Manager List
5. Link this list to your Action Plan
6. Add contacts to your Contact List Manager List
    A. Drag and Drop
    B. From Reports
7. Process your Action Plan

General Questions and Answers:

Open Q&A period
Suggestions for future Action Plan Training Sessions – WebNr's