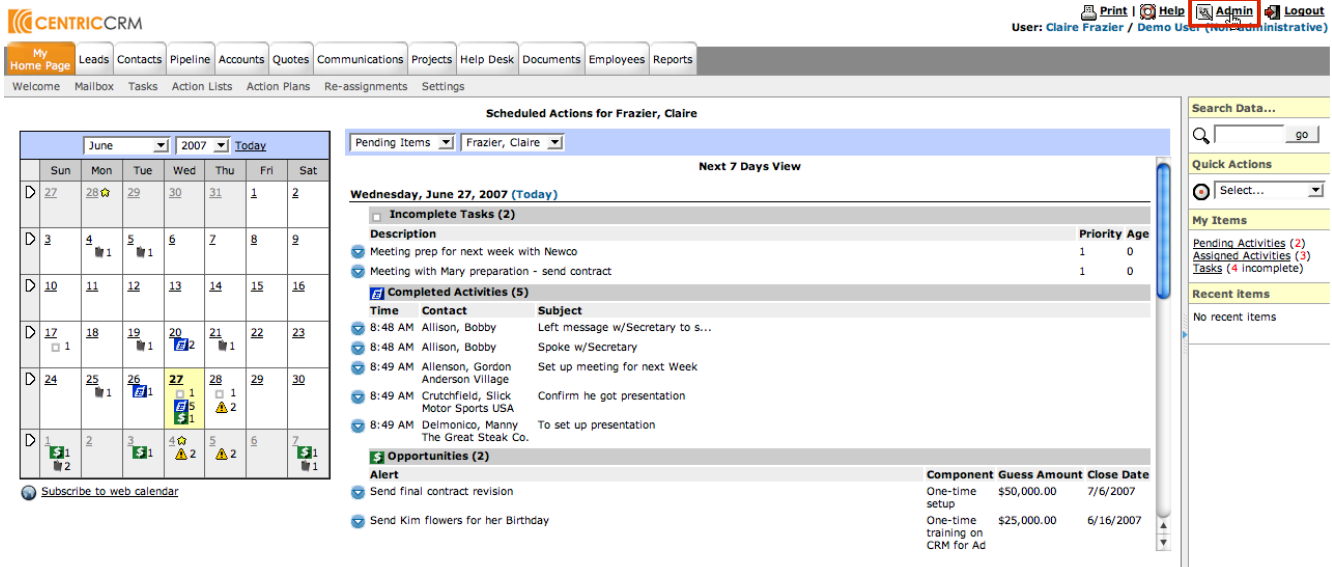


How To Create an Action Plan – Admin

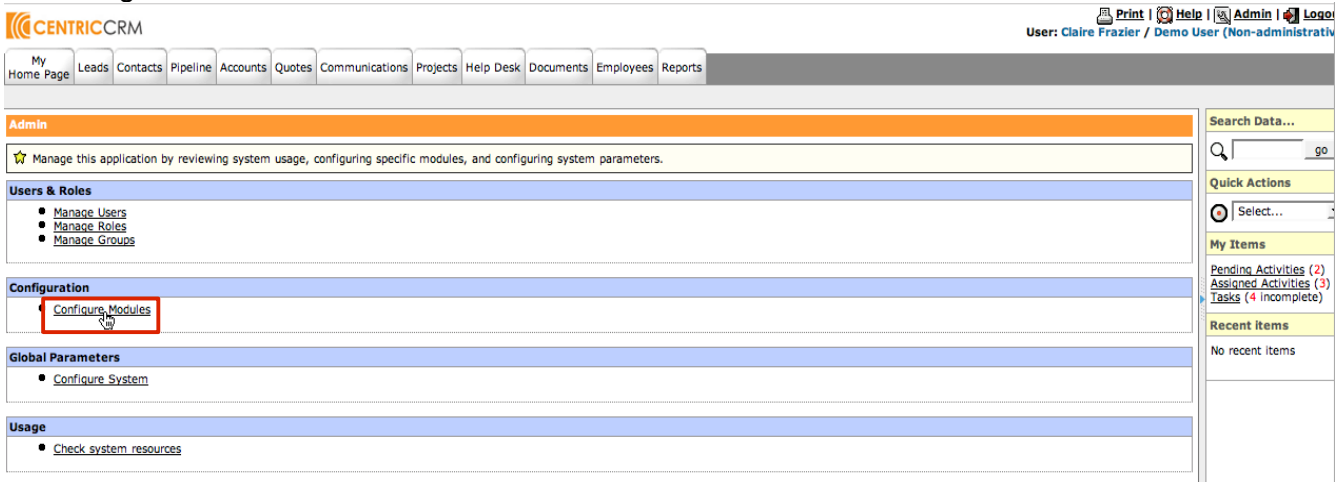
Action Plans are to used help department heads better manage and structure the day-to-day processes of their staff. One example of an action plan can be to assign to a sales rep to work a lead. Another example, would be for a customer service rep to follow through with a client inquiry using template best practice methods. Action plans usually contain one or more phases each with one or more steps. Typically one person per business is given an administrative role, which allows him/her to have privileges of creating action plans, along with every other permission in Centric. If you are a non-administrative user, the Admin link will not appear in your view of the Centric site, therefore we suggest you see your supervisor if any questions arise. Action plans are also located in the help desk tab and soon will be available for each module. Nevertheless, the steps for creating an action plan in the Admin tab are generic when configuring one for either accounts or help desk.

Login to your Centric CRM site
Click on the “Admin” link

The screenshot shows the Centric CRM interface. The top navigation bar includes links for Print, Help, Admin (highlighted with a red arrow), and Logout. The user is identified as 'User: Claire Frazier / Demo User (Non-administrative)'. The main content area is titled 'Scheduled Actions for Frazier, Claire'. It features a calendar on the left showing dates from June 27 to July 7, 2007. The right side displays a list of tasks and opportunities. The tasks section includes 'Incomplete Tasks (2)' and 'Completed Activities (5)'. The opportunities section includes 'Opportunities (2)'.

A new window appears with a list of options that can be customized by any Administrative user
Select “Configure Modules”



The screenshot shows the 'Admin' window in Centric CRM. The top navigation bar includes links for Print, Help, Admin, and Logout. The user is identified as 'User: Claire Frazier / Demo User (Non-administrative)'. The main content area is titled 'Admin' and contains a list of options that can be customized by any Administrative user. The options are categorized into 'Users & Roles', 'Configuration', 'Global Parameters', and 'Usage'. The 'Configuration' section is highlighted, and the 'Configure Modules' option is selected and highlighted with a red box.

Select “Accounts” module

CENTRICCRM Print | Help | Admin | Logout
User: Claire Frazier / Demo User (Non-administrative)

My Home Page | Leads | Contacts | Pipeline | Accounts | Quotes | Communications | Projects | Help Desk | Documents | Employees | Reports

Admin > Configure Modules

Setup the system to meet the specific needs of your organization, including configuration of lookup lists and custom fields. Choose a module to proceed.

Modules

- Accounts**
- Assets
- Contacts
- Employees
- Help Desk
- Leads
- Pipeline
- Product Catalog
- Quotes
- Service Contracts

Search Data...

Quick Actions

My Items

Assigned Activities (3)
Tasks (4 incomplete)

Recent Items

No recent items

Select “Action Plan Editor”

CENTRICCRM Print | Help | Admin | Logout
User: Claire Frazier / Demo User (Non-administrative)

My Home Page | Leads | Contacts | Pipeline | Accounts | Quotes | Communications | Projects | Help Desk | Documents | Employees | Reports

Admin > Configure Modules > Accounts

Configuration Options

- Action Plan Editor**
- Custom Fields & Fields
- Lookup Lists

Search Data...

Quick Actions

Select “Edit”

CENTRICCRM Print | Help | Admin | Logout
User: Claire Frazier / Demo User (Non-administrative)

My Home Page | Leads | Contacts | Pipeline | Accounts | Quotes | Communications | Projects | Help Desk | Documents | Employees | Reports

Admin > Configure Modules > Accounts > Action Plan Editors

Description

Edit Action Plans related to Accounts

Search Data...

Quick Actions

Select “Add Action Plan”

CENTRICCRM Print | Help | Admin | Logout
User: Claire Frazier / Demo User (Non-administrative)

My Home Page | Leads | Contacts | Pipeline | Accounts | Quotes | Communications | Projects | Help Desk | Documents | Employees | Reports

Admin > Configure Modules > Accounts > Action Plan Editors > Action Plans

Create, Modify or Delete Action Plans

Add Action Plan [Configure Categories](#)

0 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

No records to display [Previous]Next

Name	Phases	Steps	Approved	Active Date	Archived	Archived Date	Site	Records
No action plans found.								

[Previous]Next Page 1 of 1, Items per page: 10 Go

Search Data...

Quick Actions

My Items

Assigned Activities (3)
Tasks (4 incomplete)

Recent Items

No recent items

“Name” the action plan

Select the “Approve” box after finalizing the plan in order to utilize it in the Accounts module

Select “Save” to continue adding an action plan or “Cancel” to return to the Action Plan Menu

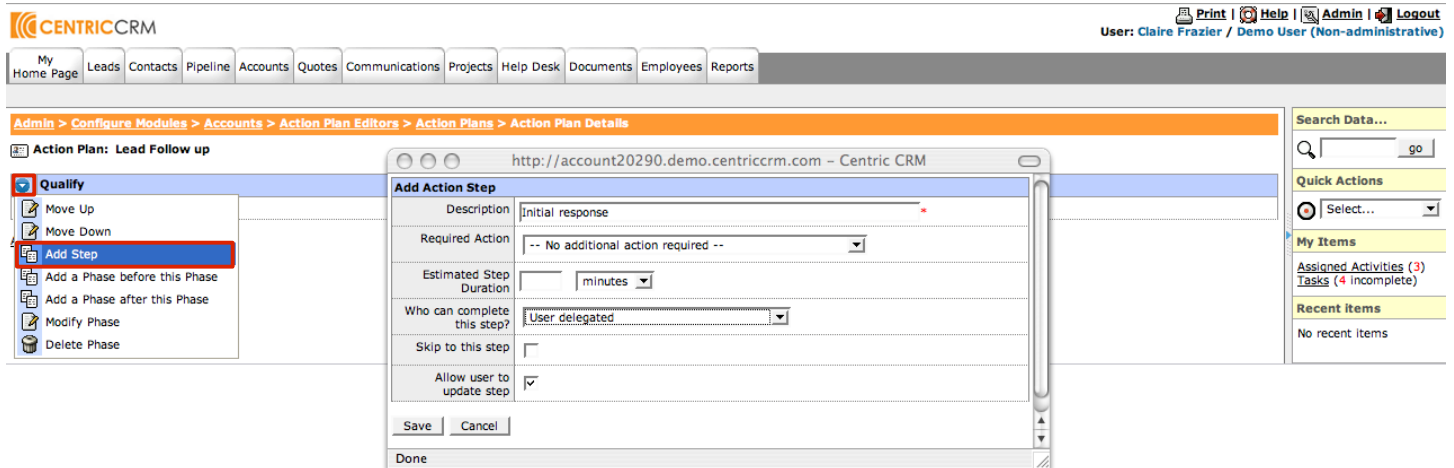
The screenshot shows the 'Add Action Plan' form in the CENTRICCRM interface. The breadcrumb trail is 'Admin > Configure Modules > Accounts > Action Plan Editors > Action Plans > Add Action Plan'. The form fields are: Name (Lead Follow up), Description (empty), Approved (checked), Category (Undetermined), Sub-level 1 (Undetermined), Sub-level 2 (Undetermined), Sub-level 3 (Undetermined), and Site (-- None --). There are 'Save' and 'Cancel' buttons at the bottom. On the right, there is a sidebar with 'Search Data...', 'Quick Actions', 'My Items' (Assigned Activities (3), Tasks (4 incomplete)), and 'Recent Items' (No recent items).

Select “Add a Phase” to begin the action plan outline

Note: Phases are used to organize steps based on the order of execution

The screenshot shows the 'Add Action Phase' dialog box in the CENTRICCRM interface. The breadcrumb trail is 'Admin > Configure Modules > Accounts > Action Plan Editors > Action Plans > Action Plan Details'. The main page shows 'Action Plan: Lead Follow up' and 'Add a Phase' button. The dialog box fields are: Name (Qualify), Description (empty), Steps can execute in random order (unchecked), Enable (checked), and Global Phase (unchecked). There are 'Save' and 'Cancel' buttons at the bottom. The dialog box title is 'http://account20290.demo.centriccrm.com - Centric CRM'. The background shows the 'Action Plan Details' page with 'No Phases found.' and the same sidebar as the previous screenshot.

Select “Add Step” from the blue icon to the left of the “phase name” to insert a step within this phase
Note: Other phase options are present for additional editing and arrangement purposes.



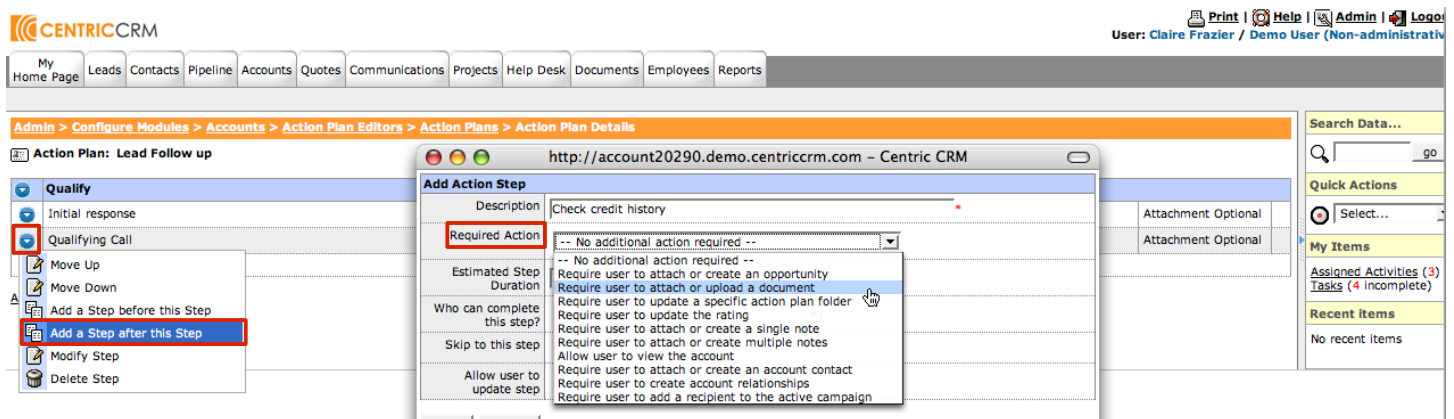
Select “Add a Step After This Step” from the blue circle, which is to the left of the previously added step.

Note: Other step options are there for additional editing and arrangement purposes.


This step includes a “Required Action” of “Attaching or Uploading a Document,” which in this case would be an official credit report.

Note: The delegated user will not be able to move on to the next step without adhering to the selected “Required Action”

Select “Save” or “Cancel” to return to the action plan



Once phases and steps are inserted accordingly, this is the finalized Admin view of the action plan.



[Print](#) | [Help](#) | [Admin](#) | [Logout](#)
User: Claire Frazier / Demo User (Non-administrativ

[My Home Page](#) | [Leads](#) | [Contacts](#) | [Pipeline](#) | [Accounts](#) | [Quotes](#) | [Communications](#) | [Projects](#) | [Help Desk](#) | [Documents](#) | [Employees](#) | [Reports](#)

[Admin > Configure Modules > Accounts > Action Plan Editors > Action Plans > Action Plan Details](#)

Action Plan: Lead Follow up

Qualify			
Initial response		User delegated	Attachment Optional
Qualifying Call		User delegated	Attachment Optional
Check credit history *	Attach Document	User delegated	Attachment Mandatory
Present Solution			
Call to set up demo		User delegated	Attachment Optional
Give Demo		User delegated	Attachment Optional
Quote			
Create Quote		User delegated	Attachment Optional
Present quote	Attach Document	User delegated	Attachment Optional
Follow up		User delegated	Attachment Optional
Requote if required		User delegated	Attachment Optional
Close Sale			
Deliver Contract		User delegated	Attachment Optional
Follow up- retrieve contract		User delegated	Attachment Optional
Schedule training		User delegated	Attachment Optional
Implement		User delegated	Attachment Optional

[Add a Phase](#)

Search Data...
 go

Quick Actions
[Select...](#)

My Items
[Assigned Activities \(3\)](#)
[Tasks \(4 incomplete\)](#)

Recent Items
No recent items