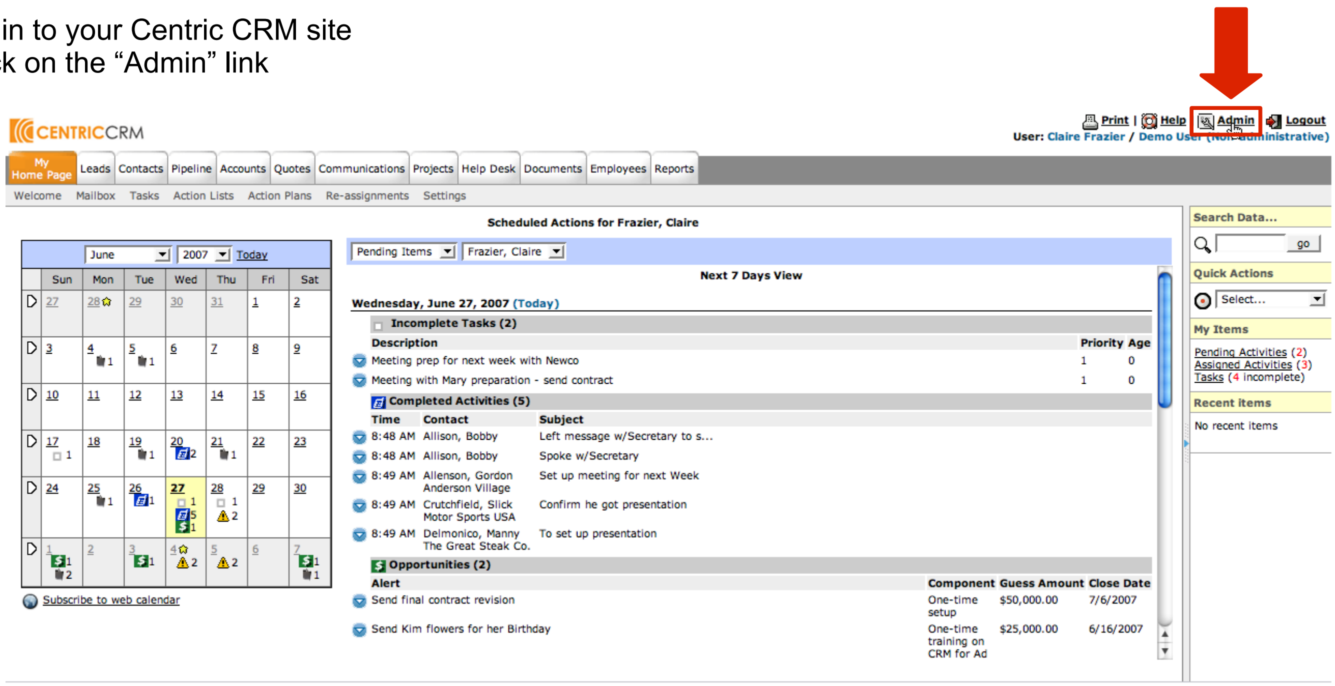
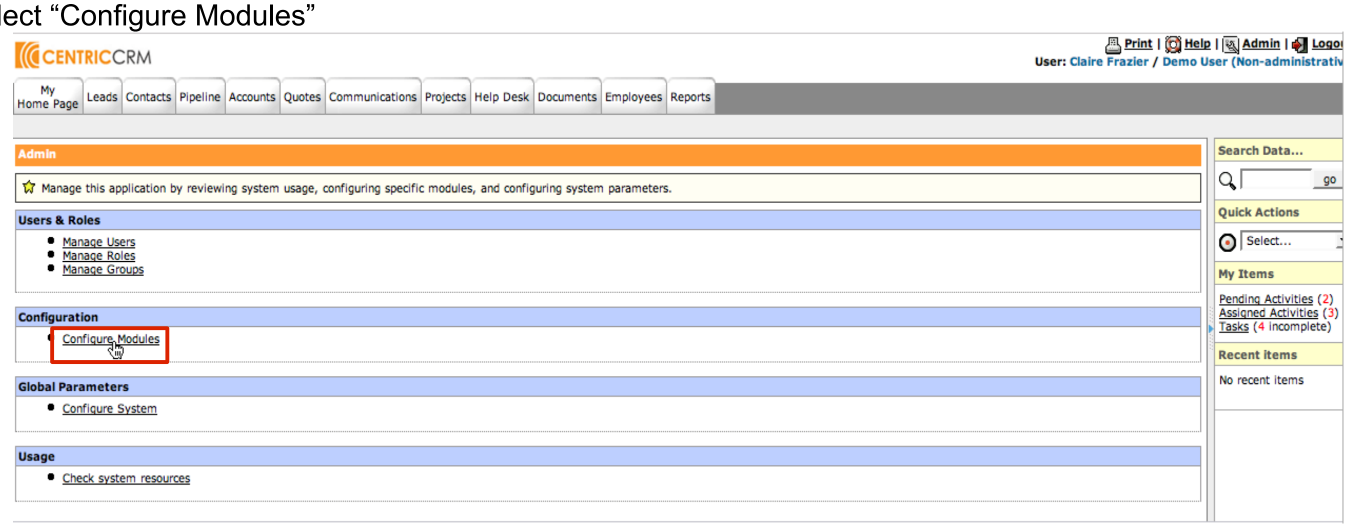
How To Create an Action Plan – Admin

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.

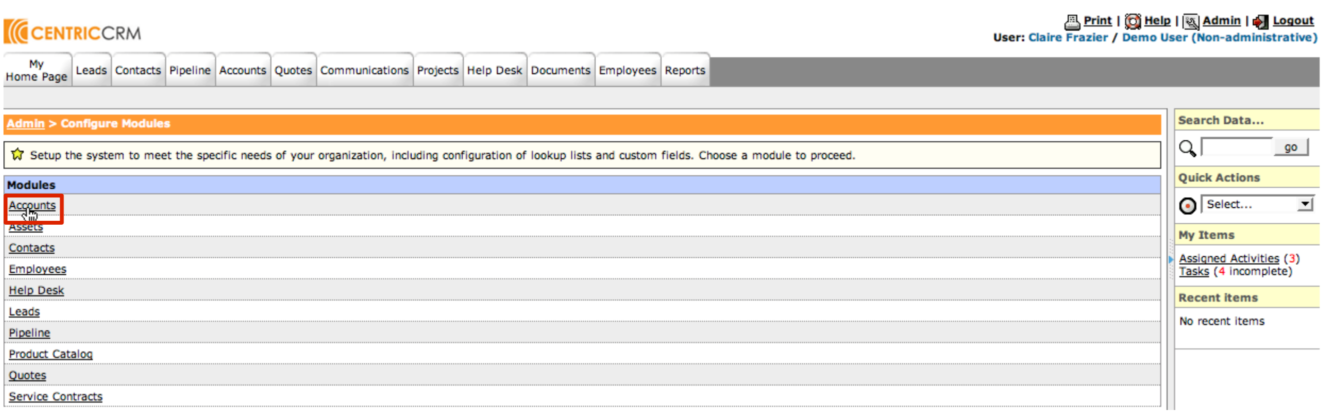
Login to your Centric CRM site
Click on the “Admin” link



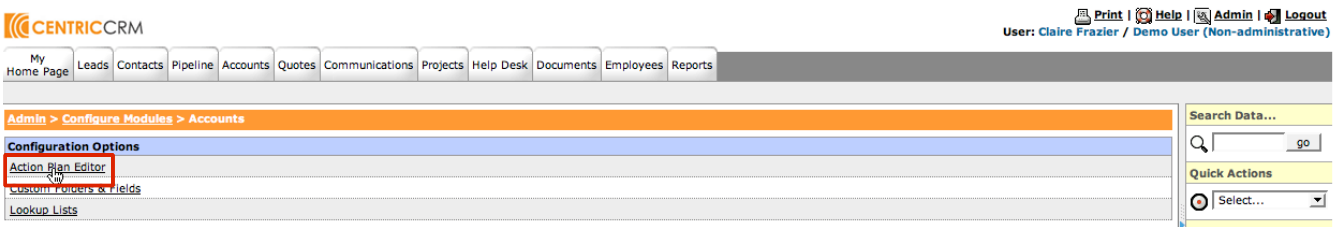
A new window appears with a list of options that can be customized by any Administrative user
Select “Configure Modules”



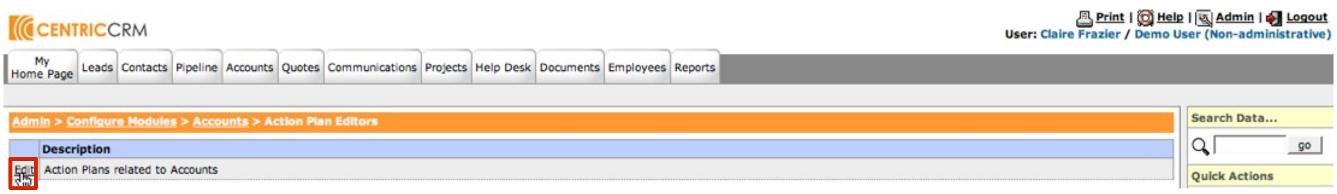
Select “Accounts” module



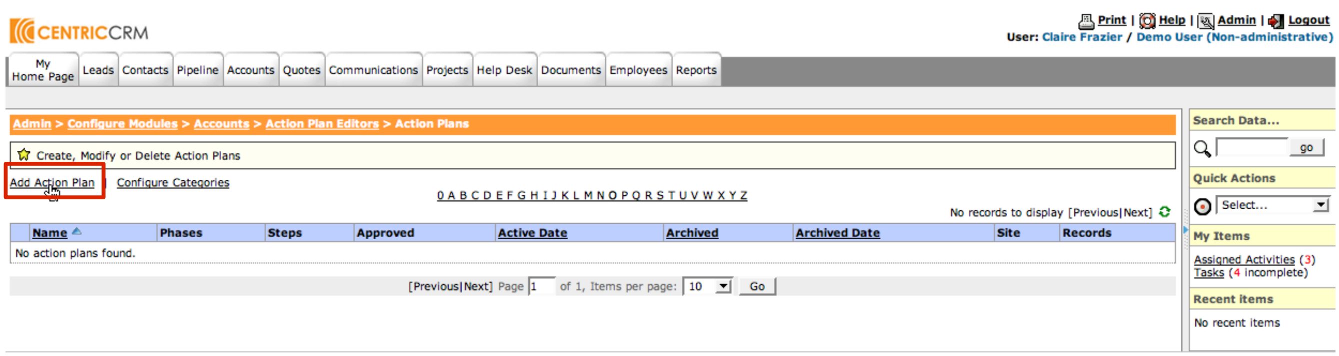
Select “Action Plan Editor”



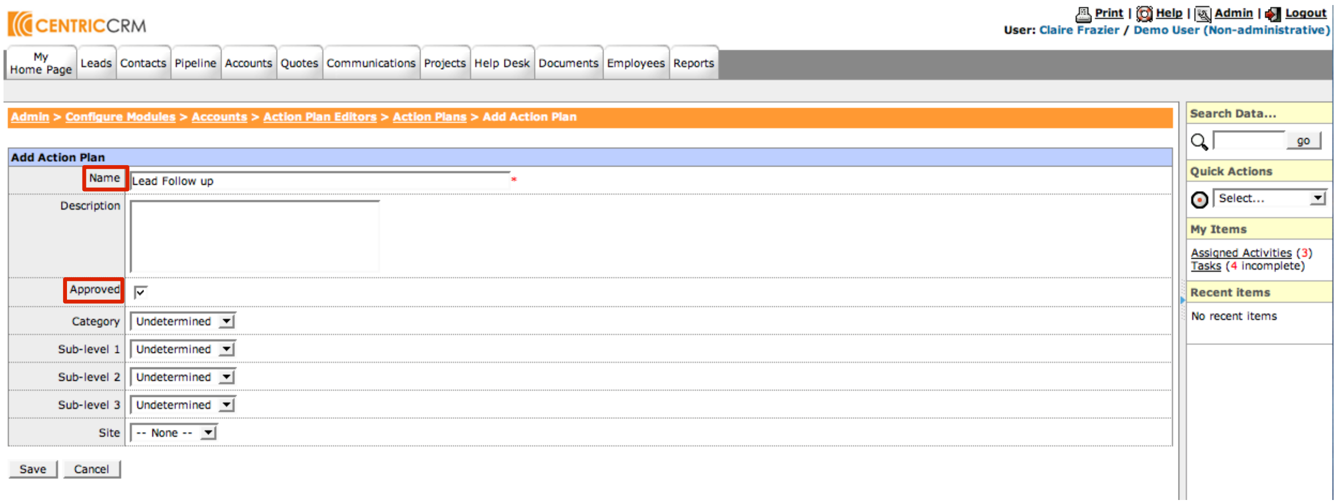
Select “Edit”



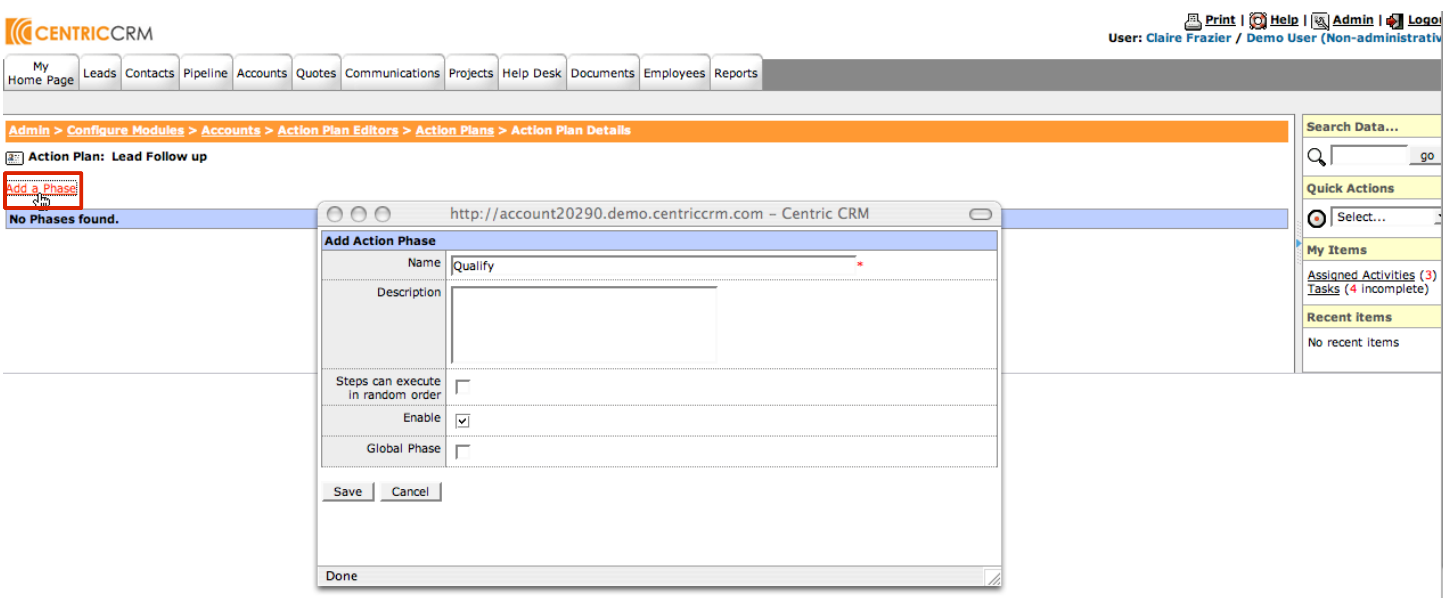
Select “Add Action Plan”



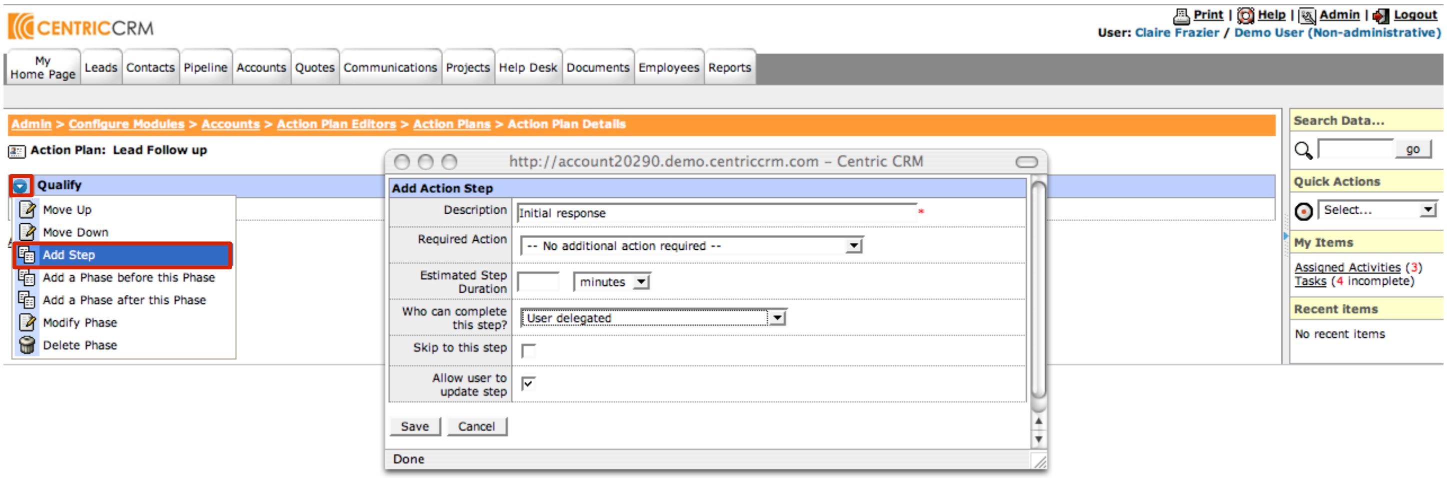
“Name” the action plan
Select the “Approve” box after finalizing the plan in order to utilize it in the Accounts module
Select “Save” to continue adding an action plan or “Cancel” to return to the Action Plan Menu



Select “Add a Phase” to begin the action plan outline
Note: Phases are used to organize steps based on the order of execution



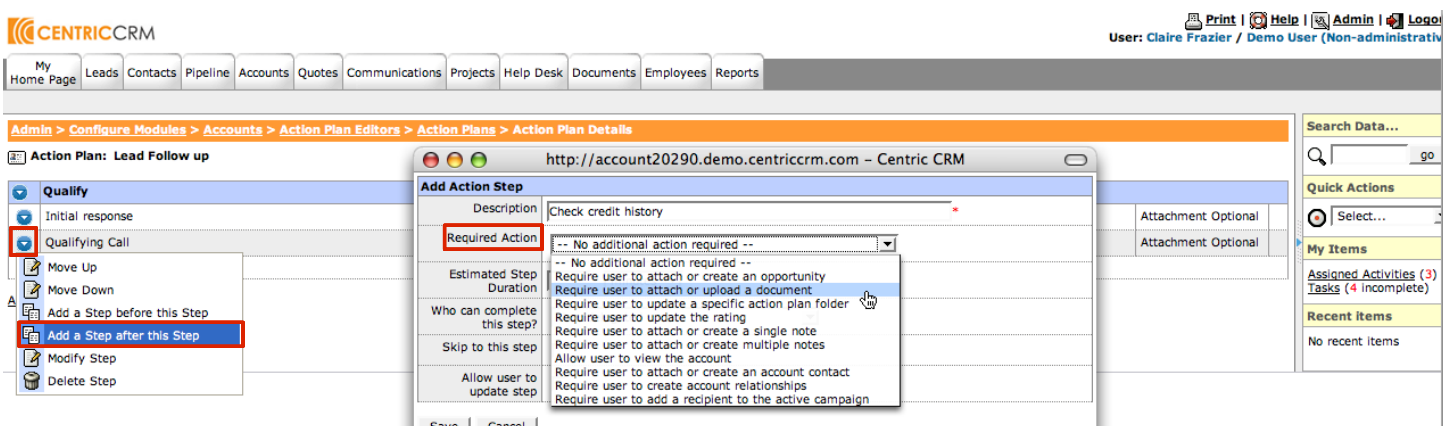
Select “Add Step” from the blue icon to the left of the “phase name” to insert a step within this phase
Note: Other phase options are present for additional editing and arrangement purposes.



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.