Plans Manager

About Action Plans

Action plans are pre-defined events that are automatically scheduled, based on a specified date and time. Within an action plan are a number of scheduled tasks designed to help you accomplish a goal. Successful plans can be repeated by having them displayed in ‘My Schedule’.

Action plans include new client plans, past client plans, farming and follow-up plans. There are up to four levels of action plan, depending on your access level.
For example an Agent will only see and work with Personal action plans.

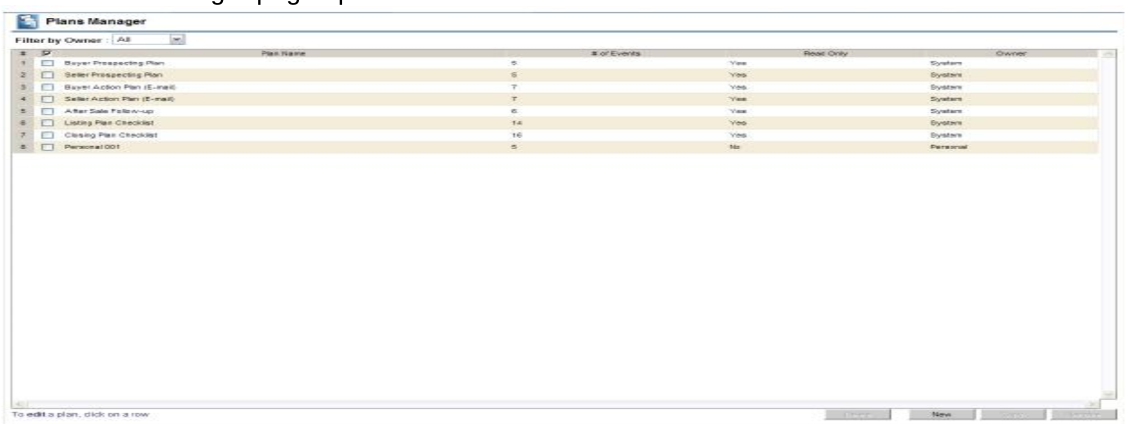
Managing Action Plans

The Plan Manager page gives you an overview of the plans that are available to you, the number of events within each, whether they are read only, whether you have editing rights, and the type of plan (e.g. System, Personal, etc.).

▶ ↓To access the Plan Manager:

1. From the main menu, click **Schedule > Plans Manager**.

   The Plans Manager page opens.



2. You can change the page view by:
   - clicking a column header to sort the list in ascending or descending order.
   - dragging and dropping a column header to a new location to rearrange the column order.
3. Click the **Filter by Owner** drop-down list in the top left corner to view only those plans of a specific type; or select **All** to see the entire list.
4. Click on a row to view or edit a specific plan.

   Note: You must have sufficient access rights to be able to edit a plan. Anyone can edit their own Personal plans.

5. Select a plan, then, use the buttons in the bottom right corner:
   - **New** — create a new action plan, based on your level of security. For example, if you only have Agent access, you can only create a new Personal action plan.
   - **Copy** — create a new action plan by taking a copy of an existing plan, then renaming it.

- **Rename** — change the name of an existing plan, based on your level of security.
- **Delete** — deletes the selected plan and all incomplete client events associated with the plan.

Copying an Action Plan

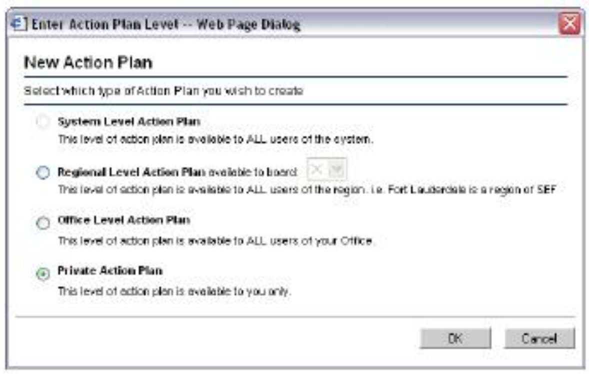
If there is an action plan that you'd like to use again, simply copy it, make the necessary changes and save it under another name. A copied action plan is called a Personal plan, which means you can edit or delete it at any time.

1. From the Plans Manager page, select a plan from the list.

   Note: You can only copy one action plan at a time.

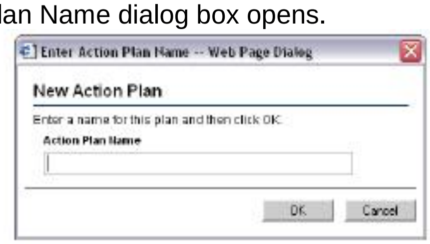
2. Click the **Copy** button.

   The New Action Plan dialog box opens.



3. Choose the level of action plan you want to create.
4. Click **OK**.

   The Enter Action Plan Name dialog box opens.



5. Type a new name for the Action plan, then, click **OK**.

   The new plan is listed on the Plans Manager page.

6. Click the plan to make changes.

Renaming an Action Plan

You can rename an action plan for which you have sufficient access privileges.

1. From the Plans Manager page, select a plan from the list.

2. Click the **Rename** button. The Rename Action Plan dialog box opens.

3. Type a new name in the **Action Plan Name** field, then click **OK**.

   The renamed action plan appears on the Plans Manager page.

Deleting an Action Plan

1. From the Plans Manager page, select one or more action plans from the list.
2. Click the **Delete** button. A warning message appears, asking you to confirm the deletion.
3. Click **OK**.

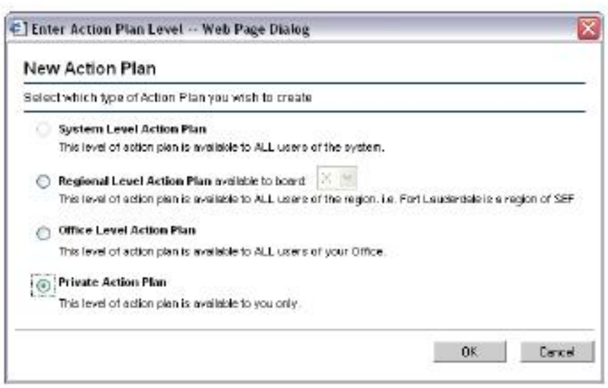
Creating a New Action Plan

When you create a new action plan, it isn't enough just to name it. You must add events to it (appointments, to-dos, calls).

Note: These instructions are also valid for editing an action plan.

1. From the Plans Manager page, click the **New** button, located in the bottom right corner.

NOTE! The Enter Action Plan Level pop-up dialog box opens.



If you don't see this dialog box, your level of access within the program is set to the Private level only. In this case you will only work with Private action plans.

2. Select the level of action plan you want to create.
3. Click **OK**. The Enter Action Plan Name dialog box opens.

4. Type a name, then click **OK**.

   The new action plan is displayed on the Plans Manager page.

   *Note: Notice the **Owner** column. It tells you the level of your new action plan.*

5. From the Plans Manager page, click on the new action plan in the list.

   The Plans Manager - [name of plan] opens.

   There are no events listed.

Adding Events to an Action Plan

The events you add to an action plan will be generated once the plan is applied, because the dates of the events are directly dependent upon the start or end date of the entire action plan.

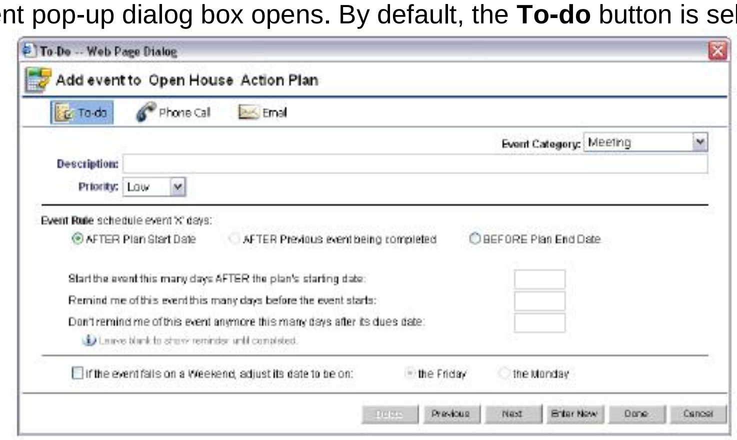
Note: Note how action plan events are different than adding single events directly to the calendar or to a client.

There are three types of event: To-do, Phone call, and e-mail. A To-do is an event that does not have a specific time associated to it, but is part of the list of things to accomplish.

► ↓To add a To-Do to the action plan:

1. From the Plans Manager - [plan name] page, click the **New** button.

   The Add Event pop-up dialog box opens. By default, the **To-do** button is selected.

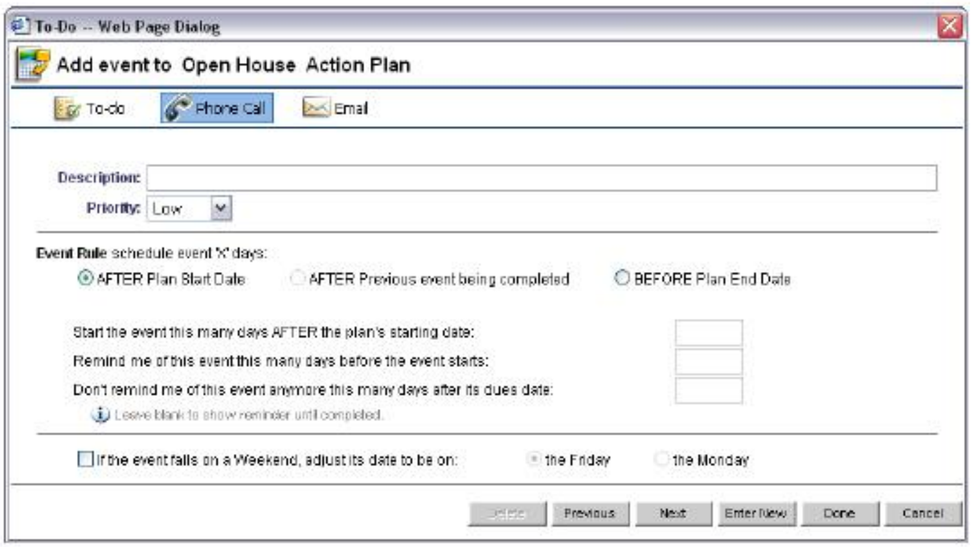


2. Click the **Event Category** drop-down list and choose the type of To-do task you want to add: Meeting, To-do, Letter, Fax, Note or Lead.
3. Type a **Description** of the event in the field provided.
4. Select a level of **Priority** for this task: Low, Normal or High.
5. In the **Event Rule** section, schedule the event to occur in relation to the plan date:
   - **AFTER Plan Start Date** — enter the number of days this event should start, AFTER the plan's start date.
   - **After Previous event being completed** — enter the number of days this event should start, AFTER the plan's previously scheduled event ends. Then click the drop-down list and select the previous event.
   - **BEFORE Plan End Date** — enter the number of days this event should start, BEFORE the plan's end date.
6. Set up a reminder by entering the number of days you want to be reminded BEFORE the event starts.
7. End a reminder for an overdue event by entering the number of days AFTER the due date. You will stop being reminded.
   - leave this field blank to continue the reminders until the event's completion.
8. To avoid scheduling on Saturday or Sunday, select the check box, **If the event falls on a week-end, adjust its date to be on**, and choose either **the Friday** or **the Monday**. The event is automatically rescheduled.
9. Click **Done**; or **Enter New** if you are scheduling more new events.

▶ ↓To add a Phone Call to the action plan:

1. From the Plans Manager - [plan name] page, click the **New** button.

   The Add Event pop-up dialog box opens.
2. Click the **Phone Call** button.



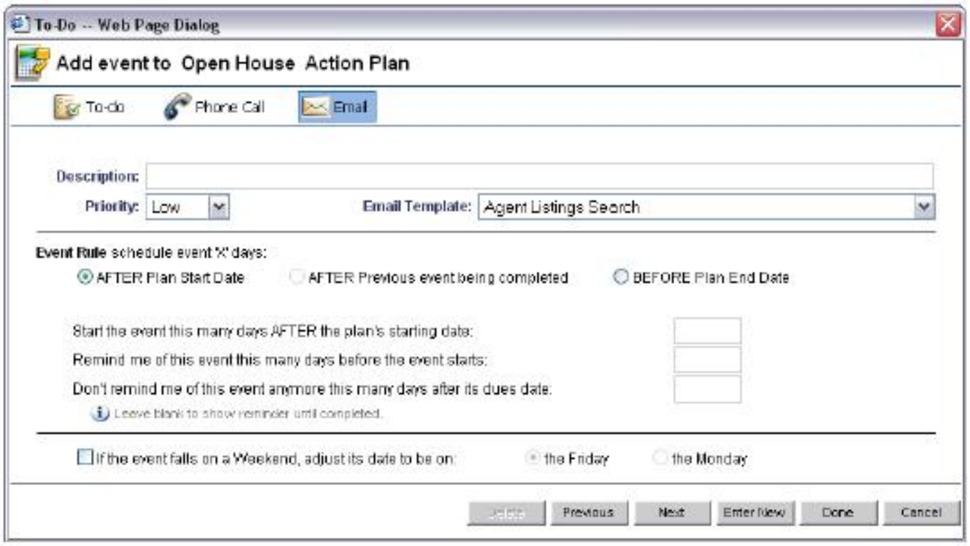
3. Follow steps #3-9 of the previous topic. The fields for entering a new call event are the same as entering a new To-do.

↓To add an E-Mail to the action plan:

1. From the Plans Manager - [plan name] page, click the **New** button.

   The Add Event pop-up dialog box opens.

2. Click the **E-mail** button.



3. Type a **Description** of the event in the field provided.
4. Select a level of **Priority** for this task: Low, Normal or High.
5. Click the **Email Template** drop-down list and select the name of a pre-written message to use.
6. Follow steps #5-9 of the previous topic. The remaining fields for entering a new e-mail event are the same as entering a new To-do or Call event.

Editing Events in an Action Plan

The instructions for editing an event are the same as for adding an event.

1. From the Plans Manager page, click on a plan.

   The selected plan opens, displaying the events.

2. Select an event to edit by:
   - selecting the check box, then clicking the **Edit** button; or
   - clicking directly on the event in the list
3. Modify the information in the fields.

Deleting Events from an Action Plan

You can delete an event from an action plan, if you have sufficient access privileges.

1. From the Plans Manager page, click on a plan. The selected plan opens, displaying the events.

2. Select one or more events to delete, then click the **Delete** button. A message box appears asking you to confirm the deletion.
3. Click **OK**.

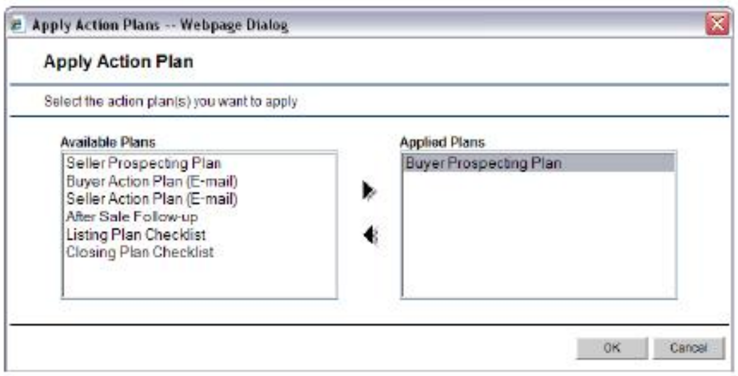
Applying an Action Plan

Once you have created some action plans with events, you can apply an action plan directly from the **Tasks** tab of a selected client's record. As well, you can schedule a follow-up activity or an appointment with the client that is independent of the action plan and its related events.

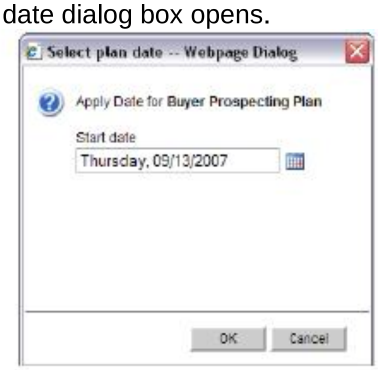
1. From the Client Manager page, select one or more clients, then, click the **Details** button.

   The client record opens.
2. Click the **Tasks** tab.
3. Click the **Apply Plan** button in the top right corner of the page.

   The Apply Action Plan dialog box opens.



4. Highlight a plan in the **Available Plans** list.
5. Click the right arrow button [ ] to move it to the **Applied Plans** list.
6. Click **OK**. The Select plan date dialog box opens.



7. Click the calendar icon to select a **Start date**, then click **OK**.

   You can see an overview of each event's attributes from the **Tasks** tab, including whether it is a recurring event, the type of event, a short description, the date it is scheduled, etc.
8. Click the **Show Activities** drop-down list and choose an activity type to filter the list view: All, Appointments, Calls, To-dos or E-mail.

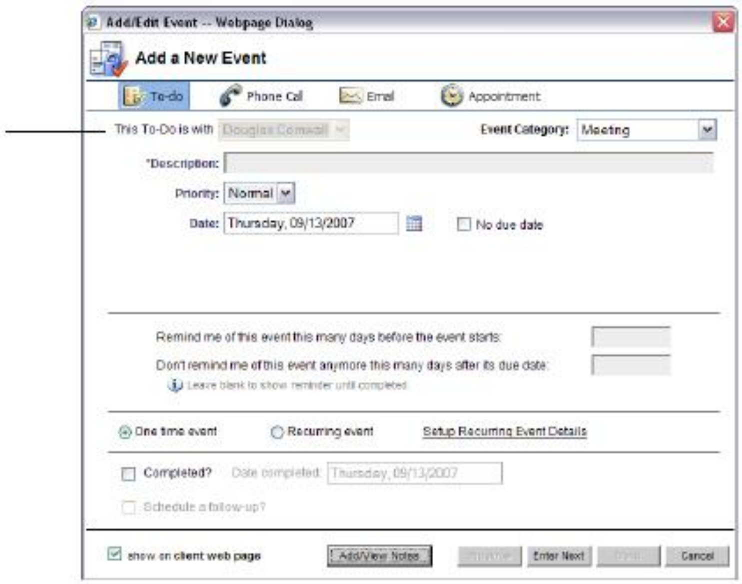
Adding Events to the Client Record

You can add an event without applying an action plan. Use the button bar located on the **Tasks** tab of the Client record, or select an event from the Action menu.

▶ ↓To add an event:

1. From the **Tasks** tab of the Client record, click the **Add Event** button; or select either **Add New To-Do** or **Add New Appointment** from the Action menu, then click the arrow button.

   The Add a New Event dialog box opens.



2. Select the type of task and the activity details.

▶ ↓To schedule a new to-do activity:

1. From the Add a New Event dialog box, click the **To-do** button.
2. Click the **Event Category** drop-down list and choose the type of To-do task you want to add: Meeting, To-do, Letter, Fax, Note or Lead.
3. Type a **Description** of the event in the field provided.
4. Select a level of **Priority** for this task: Low, Normal, High.
5. Schedule a **Date** for this event to occur:
   - click the calendar icon and choose a date; or
   - select the **No due date** check box if there is no specific date.

   *Note: If you choose **No due date**, skip to step #9. Otherwise, continue.*
6. If this is a dated event, set up a reminder by entering the number of days you want to be reminded BEFORE the event starts.
7. End a reminder for an overdue event by entering the number of days AFTER the due date that you want to stop being reminded.
   - leave this field blank to continue the reminders until the event's completion.

8. Choose the frequency of the event:
   - One time event
   - Recurring event — click the **Setup Recurring Event Details** link. .
9. If the event has already occurred and you want to mark it done, select the **Completed?** check box, then:
   - click the calendar icon to enter the **Date completed**.
   - click the **Schedule a follow-up?** check box to enable this option.
10. Click the **show on client web page** check box to display the task associated with the client on the client's Private Client Web Page view.
11. Click the **Add/View Notes** button to add comments.
12. Click **Done**; or **Enter Next** if you are scheduling another new event.

*Note: If you are entering a **Completed** To-do, select the check box, enter the **Date completed**, and choose to **Schedule a follow-up** event immediately. You are prompted to enter the details of the task.*

The task is created and you are returned to the Client Record.

NOTE! *To-Dos automatically move to the Client History section when marked complete; Appointments move to the Client History section when their End date/time has passed.*

▶ ↓To schedule a phone call:

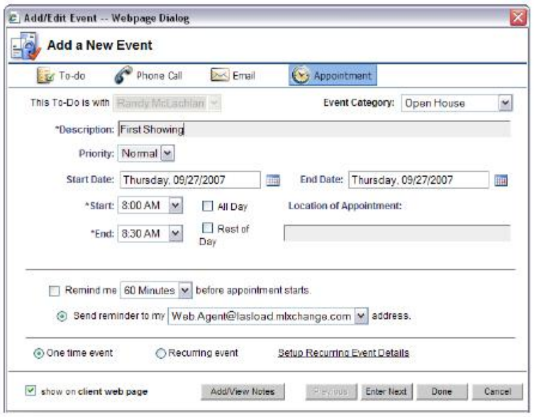
1. From the Add a New Event dialog box, click the **Phone Call** button.
2. Type a **Description** of the event in the field provided.
3. Select a level of **Priority** for this task: Low, Normal, High.
4. The remaining steps are the same as if you were adding a new To-do. Follow steps #5-12 of the topic,

▶ ↓To schedule a new e-mail:

1. From the Add a New Event dialog box, click the **E-mail** button.
2. Type a **Description** of the event in the field provided.
3. Select a level of **Priority** for this task: Low, Normal, High.
4. Select the **E-mail Template** drop-down list and choose a template with a pre-written message.
5. The remaining steps are the same as if you were adding a new To-do. Follow steps #5-12 of the topic,

▶ ↓To schedule a new appointment:

1. From the Add a New Event dialog box, click the **Appointment** button.



2. Click the **Event Category** drop-down list and choose the type of To-do task you want to add: Meeting, Call, To-do, Listing Appointment, Closing, Open House, Showing, Offer submitted, Offer accepted, or Sale closed.
3. Type a **Description** of the event in the field provided.
4. Select a level of **Priority** for this task: Low, Normal, High.
5. Schedule a **Start Date** and an **End Date** for this appointment by clicking the calendar icon and choosing a date from the calendar pop-up.
6. Select the **Start** and **End** drop-down lists and choose a time (in 15 minute intervals); or if the appointment has no time parameters:
   - select the **All Day** check box
   - specify a **Start** time then select the **Rest of Day** check box.

   NOTE! *Appointments will be added to the client's history when the End date and time has passed.*

7. Enter the **Location of Appointment** in the field provided.
8. Select the **Reminder** check box, then choose a time from the list.
9. Choose an email address from the **Send reminder to my** drop-down list.
10. Choose the frequency of the event:
    - One time event
    - Recurring event — click the **Setup Recurring Event Details** link.
11. Click the **show on client web page** check box to display the task associated with the client on the client's Private Client Web Page view.
12. Click the **Add/View Notes** button to add comments.
13. Click **Done**; or **Enter Next** if you are scheduling another new event.

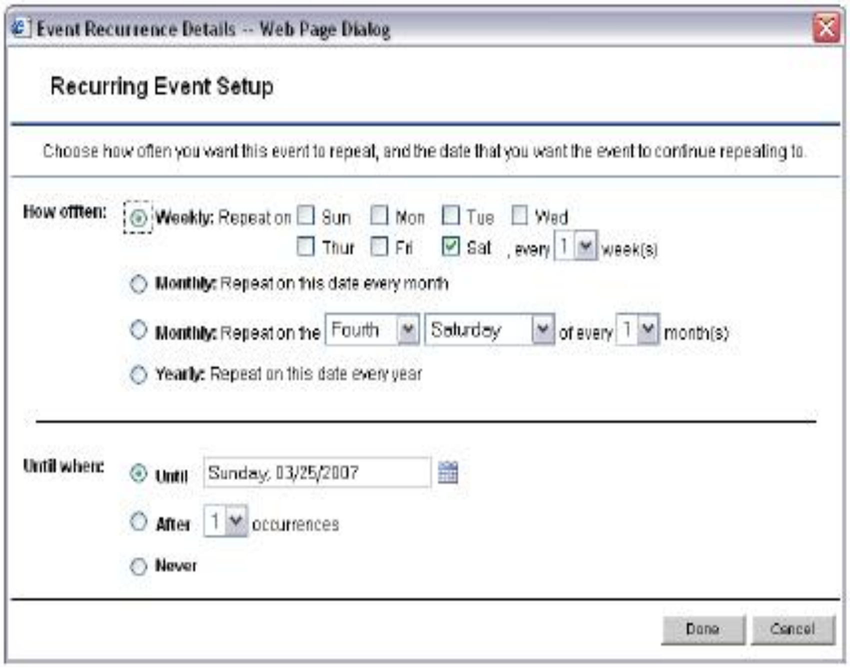
    Note: If there are conflicts between this appointment and others previously scheduled, a warning message appears. You can re-schedule the appointment or accept it.

Setting Up Recurring Events

You can set up repeating events by defining the frequency of occurrence and an end date to the event.

1. From the Add/Edit Event dialog box, click the **Setup Recurring Event Details** link.

   The Recurring Event Setup dialog box opens.



2. In the **How often** section, specify:
   - **Weekly** — select the check boxes for each day of the week, then click the drop-down list and choose how many weeks in a month to repeat the event.
   - **Monthly** — select the first option to simply schedule the event to repeat every month; or, use the series of drop-down lists to be more specific.
   - **Yearly** — select this option for an annual event.
3. In the **Until When** section, specify:
   - **Until** — click the calendar icon and select an end date for the event.
   - **After** — specify the number of occurrences AFTER which the event will automatically stop.
   - **Never** — select this option for a continuing event with no end date.
4. Click **Done**.