Action Plans

This document provides basic instruction on creating and maintaining Action Plans.

For more information, see the Action Plans trainings: https://www.youtube.com/watch?v=IkL2ylZLdz4

Action Plans encapsulates best practices into reusable task templates. An Action Plan can be created for an Account, Opportunity, Contact or Lead. Template tasks can be pre-assigned to a specific individual or assigned to the running user.

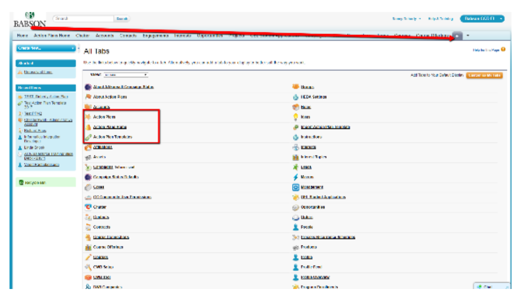
- Promotes best practices.
- Encourages reusability.
- Saves time and improves productivity.

Action Plans encapsulates best practices into reusable task templates. An Action Plan can be created for an Account, Opportunity, Contact, Lead, Campaign, Case or Contract. Template tasks can be pre-assigned to a specific individual, assigned to the running user or assigned to a running user.

<u>**Accessing Action Plans**</u>*:*

1. Enter the Action Plan Object:

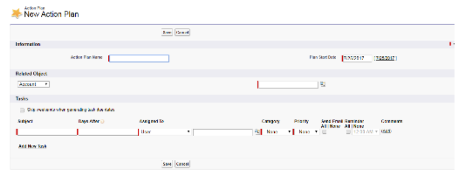
If you don't have it customized on your bar, you can also access it by clicking on the + and clicking Action Plans:



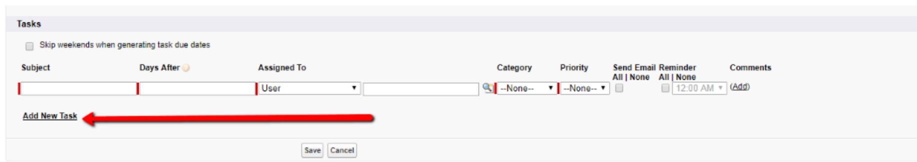
<u>**Creating a NEW Action Plan:**</u>

While on the Actions Plan tab, select **"New Action Plan"**.

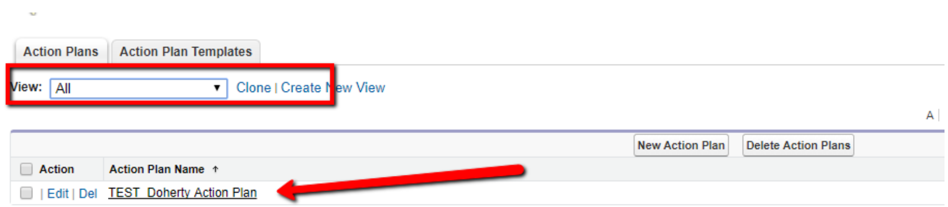
1. The Action Plan form will require you to provide the following information:
   a. Action Plan Name
   b. Plan Start Date
   c. Related Object
   d. Associated Tasks with this particular Action Plan



2. Please note, the system defaults with <u>one</u> task line. To add additional tasks within this Action Plan, please click on the Add New Task option.



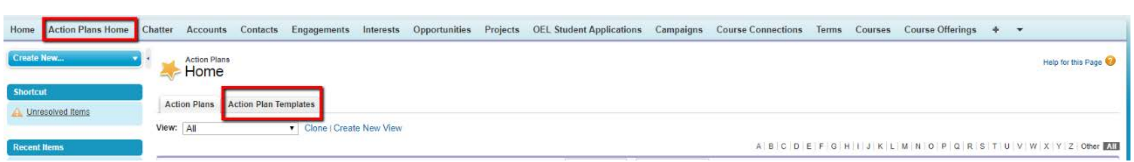
3. Once you have compiled all tasks associated with this Action Plan, click on the **<u>SAVE</u>** button.
4. Upon saving your Action Plan, the newly created plan will now be included in your view of Action Plans:



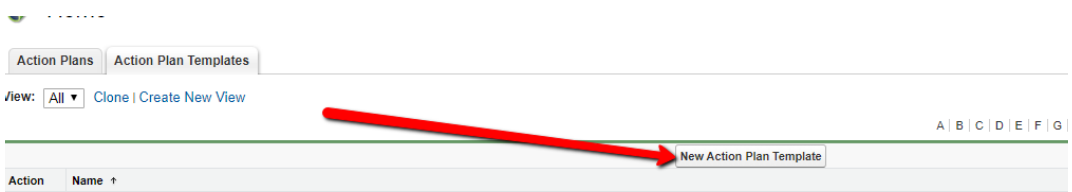
<u>Creating an Action Plan Template</u>

For many users, our "task or to do" lists associated with day to day business are repetitive! Setting up an Action Plan TEMPLATE can save you time, provide a comprehensive "to do" list and allow you to, with the click of a button, use the template for various events and activities you manage on a regular basis!

Starting on the Action Plans Home page, you can select the **Action Plans Template Tab**:

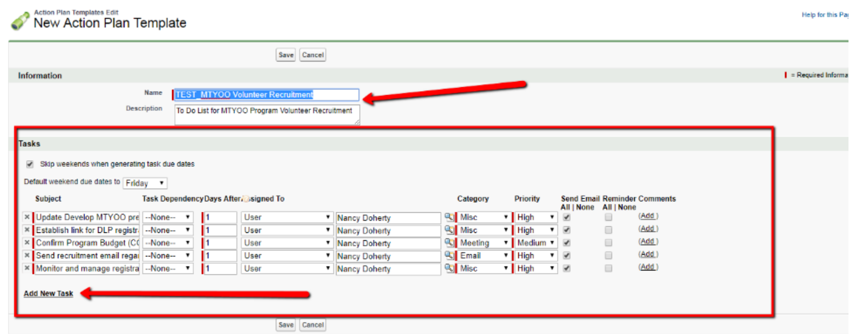


Once you have entered the Action Plans Template section, you will select the "**NEW ACTION PLAN TEMPLATE"** button to begin creating your template:



You will be required to input the following information on your template:

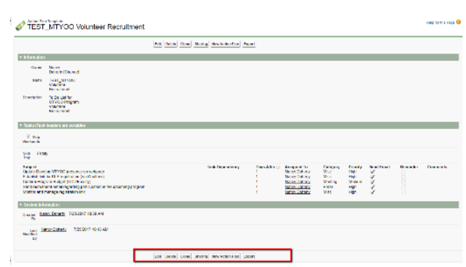
a. Template Name
b. Description of Template
c. Associated Tasks, including who the task is assigned to and when it is due.



Once you have your template in place, **SAVE** your work! Upon saving your work, you will now find a copy of the template within your Action Plans Template object:

With your template in place, you have many options on how to manage it moving forward with little effort!

You have a minor change to your logistics, you can change it! You need to add additional tasks, you can do that to! You want to close it for an event that has similar tasks but a different name, you have the power!

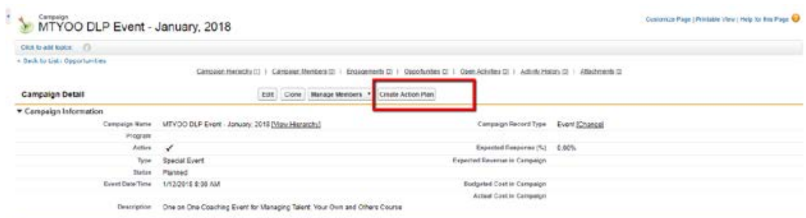


At the bottom of your template, you have the ability to EDIT, DELETE, CLONE, and EXPORT.

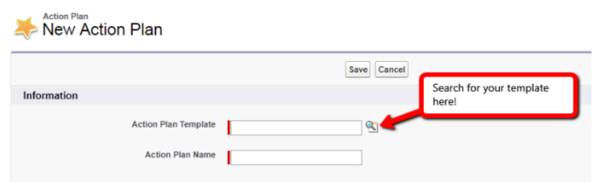
Associating an Action Plan with an Event/Campaign:

With your campaign/event set up in Salesforce, you can easily associate any Action Plan to that particular event.

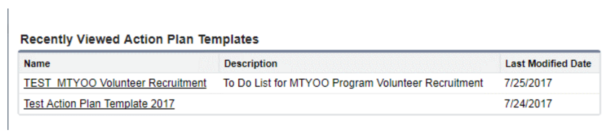
a. Open the Campaign/Event you would like to reference.
b. Upon opening, you will be able to view all associated details regarding the event.
c. Click on the "Create Action Plan" button:



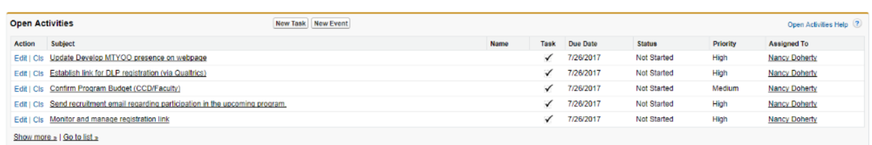
d. After entering the Action Plan area, search for your already saved template in the system:



e. After searching, select the template you would like to associate with this Campaign/Event:



f. The template Action Plan will populate on the screen – click the SAVE button and your tasks on this template will now show up in the Open Activities section of this record:



Just an FYI – the tasks listed under Open Activities on this record will also show up within the My Tasks section on the home page of the person the task is assigned to: