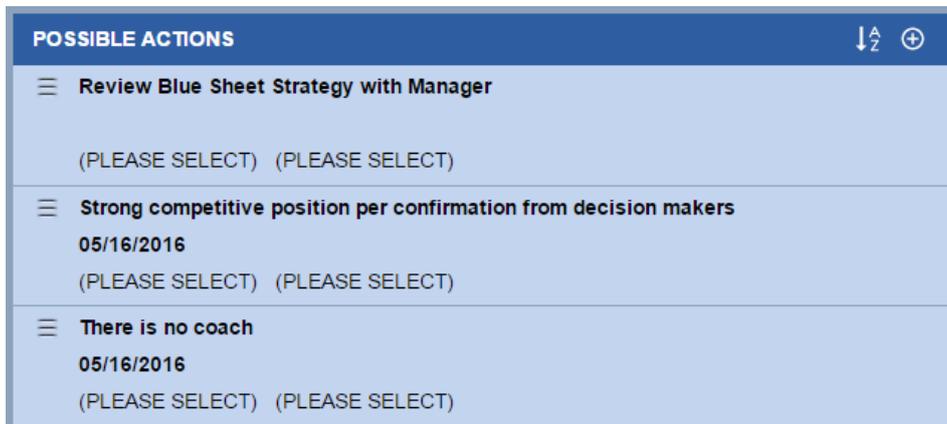# Possible Actions

Last Modified on 09/15/2016 5:12 am EDT

It is always important to list out all of your possible actions prior to determining your Best Action Plan. There must be at least one action to leverage or reinforce each strength, and at least one action to reduce or eliminate each Red Flag.

The Possible Actions section of the Blue Sheet displays a summary of Possible and Best Actions.

In most integrations, the default first Possible Action for every Blue Sheet is "Review Blue Sheet" as in the above example. Your organization may be configured to display a different default first Possible Action or to display no default first Possible Action. You can edit or delete the default Possible Action as desired.

You can add Possible Action descriptions manually or you can choose from a Suggested Items list if the Repository button is visible in the top-right corner of the Possible Actions heading. If the Repository button is not visible, then there are no Suggested Items available. Please contact your Sales Leader and System Administrator for availability of the Repository.

Fig. 16, Possible Actions

Adding a Possible Action Manually

Click the Add icon. The Possible Action / Best Action section will open to allow data entry.

Fig. 16a, Adding Possible Actions

The following list describes the fields on this section:

Description
A free-form text entry describing the action.

Contact
The Customer contact within the CRM at whom the action is directed.

When
The date the action is due. Use the Calendar tool to select the desired date. This field defaults to the current system date.

Assigned To
The CRM user who is responsible for completing the action. This field defaults to the current user.

Completed
The date the action was completed. Use the Calendar tool to select the desired date.

Status
The status of the action. Options available: Not Started, In Progress, Completed.

Type
The priority of the action. Options available: High, Normal, Low.

Select as Best Action
Whether the action should be a Best Action.
If you check this box, the action also appears in the Best Action section of the Blue Sheet and, upon save, a Task will be created for the action in the CRM (if your integration has been configured for automatic task creation).

Complete the fields in the section as desired and click Done to save changes. Simply click the Add icon again to add another possible action.

Adding a Possible Action using the Repository

Click the Repository button in the Possible Actions header. The Suggested Actions list appears.

This is a list of default actions for your organization or opportunity type.

Fig. 16b, Adding Possible Actions

If your organization is also using the Sales Process Funnel tool, you may also see a Show recommended actions for stage checkbox. When checked, this section displays a list of actions associated with a selected sales stage. If you are using Sales Process Funnel and you do not see this checkbox, contact your System Administrator to see if this can be made available for your organization.
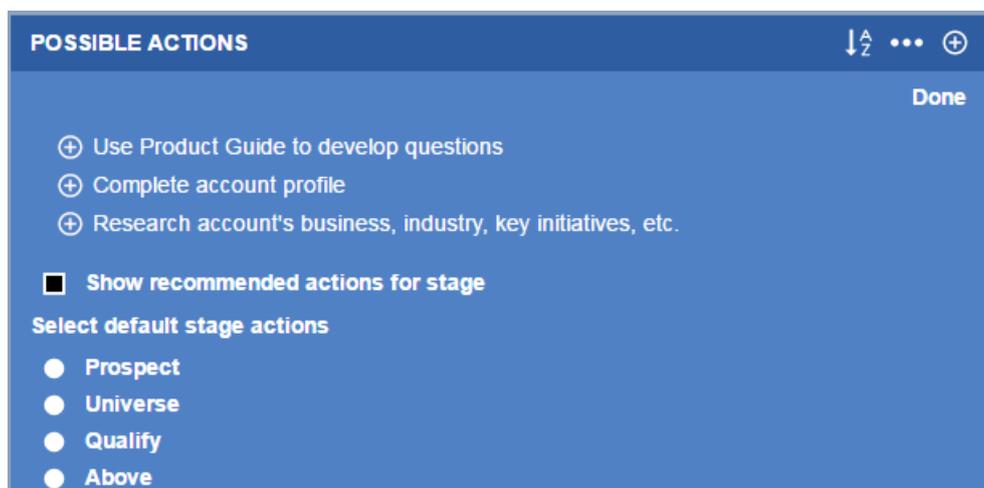

Fig. 16c, Show recommended actions

Do one of the following:
1. Click the checkbox next to the desired suggested action.
2. Click the Show recommended actions for stage checkbox.
   Select the desired sales stage.
Click the add icon next to the desired action for the selected stage.

NOTE:

If the desired sales stage does not appear in the drop-down list, that stage does not have any recommended actions associated with it.

Click Done to save the action and close the section. Simply click on the add icon again to add another action to the section.

To edit a Possible Action, simply select the field to open it and edit as desired. See the descriptions above for information on each field.

Deleting a Possible Action

When you delete a Possible Action that you have never selected as a Best Action, the action is removed from the Blue Sheet. When you delete a Possible Action that was a Best Action and a Task was also created in the CRM for it, then both the Possible Action and the task under the Best Action Plan are removed from the Blue Sheet.

To delete a Possible Action:

Click on the Possible Action to open it and click on the trash can icon.

The Blue Sheet allows a user to choose the type of object (Action or Event) a Best Action / Green Sheet will be associated with. A user can only select the record type when creating a new item and this gets locked once linked with CRM record.