HOW PERFORMANCE-DRIVEN PROCUREMENT GETS RESULTS

Action Plan

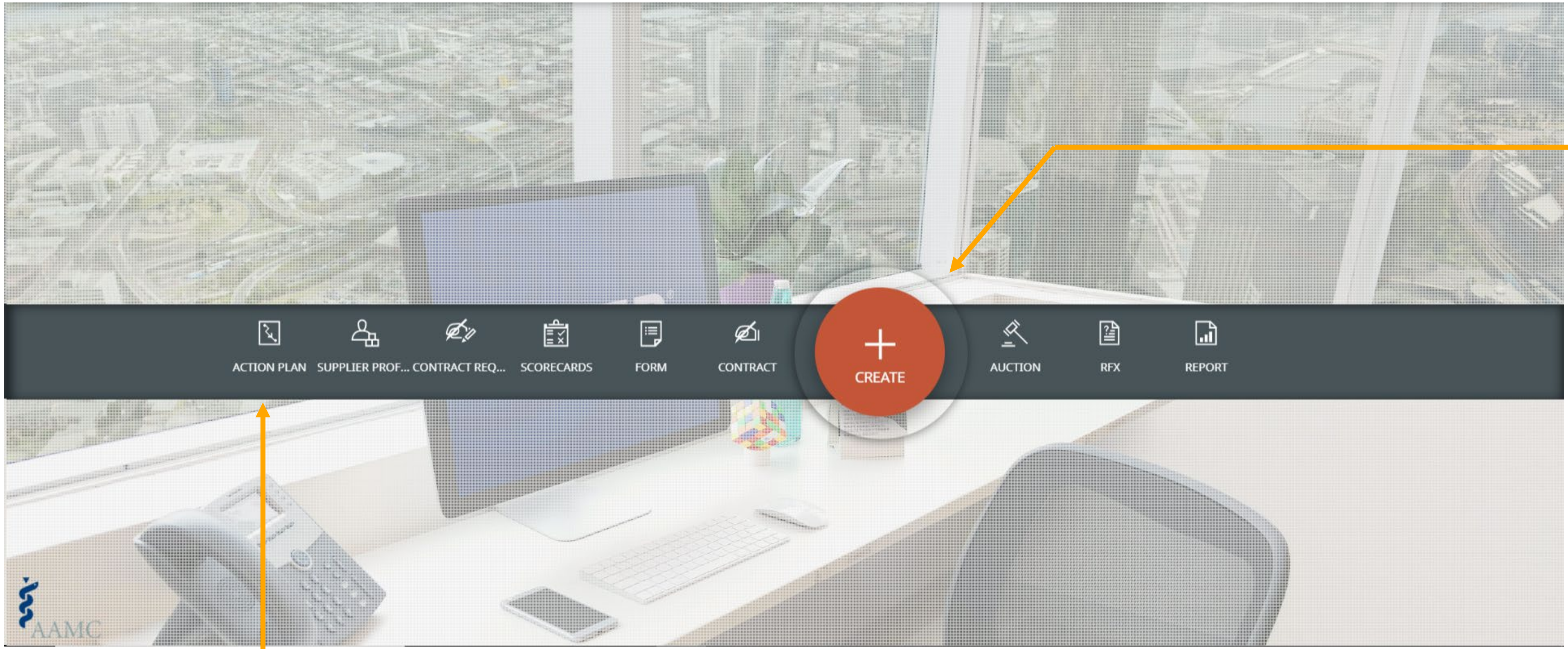
Quick Reference Guide

THE INDUSTRY'S LEADING SOURCE-TO-PAY PLATFORM

Action Plan

Action plan allows you to easily create and implement an action plan for a supplier. You can create milestones to track your action plan and send notification to suppliers. This will help you track the supplier for the task assigned. These maybe anchors where you can view the end date, assigned to, status, activities and so on.

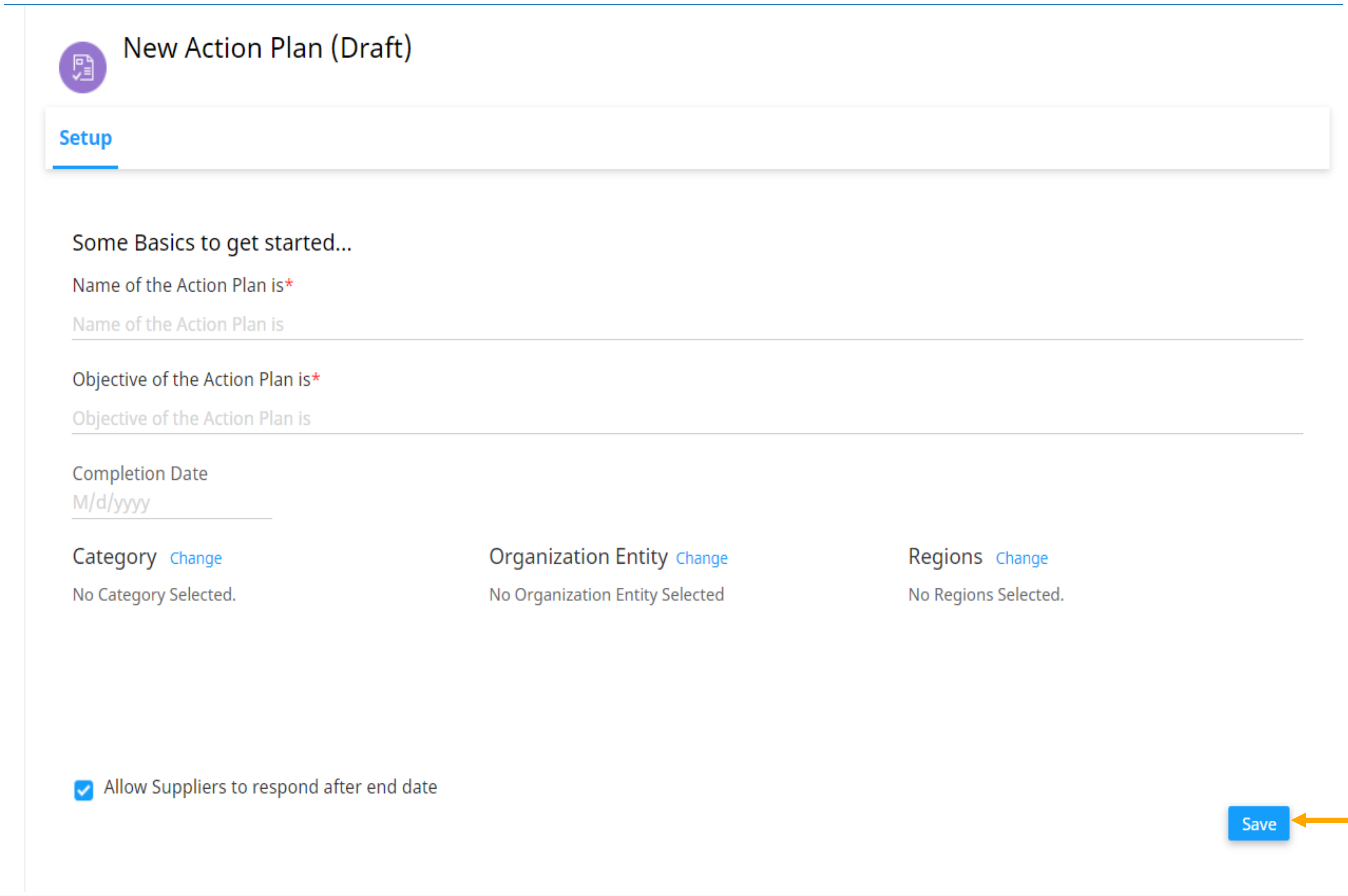
You can create an action plan as follows:



1. Click **Create** to open the cross-bar menu.

2. Click **Action Plan**.

Initially, the Action Plan document with only the Setup tab is displayed. Capture the basic details on the Setup tab and save the document. After you save the document, additional tabs – Suppliers, Milestones, and Notifications are added.

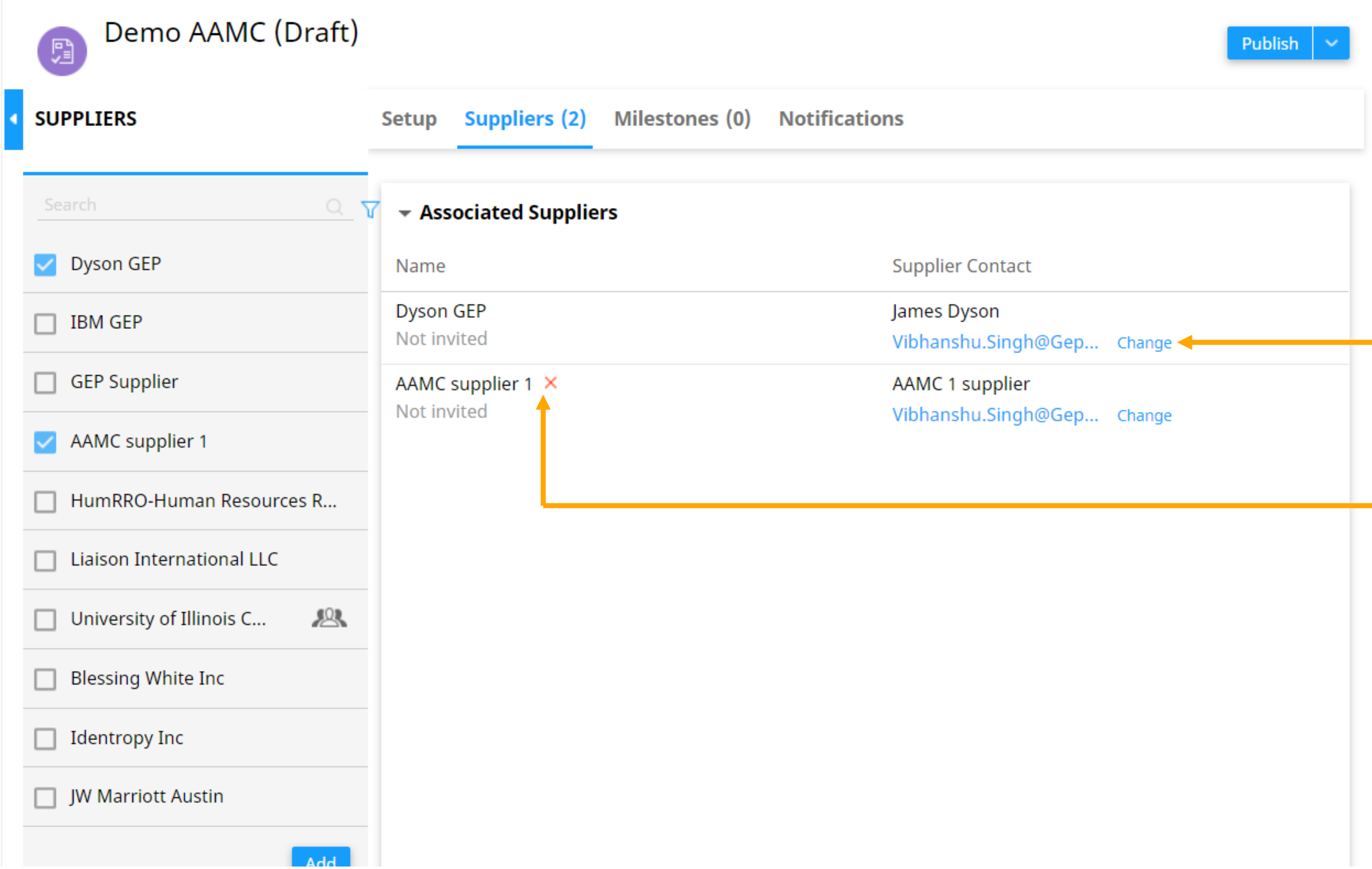


Once you have added all required details, click **Save**.

Suppliers

On the Suppliers tab, capture the suppliers with whom you want to share the action plan.

Select the required suppliers and click **Add**

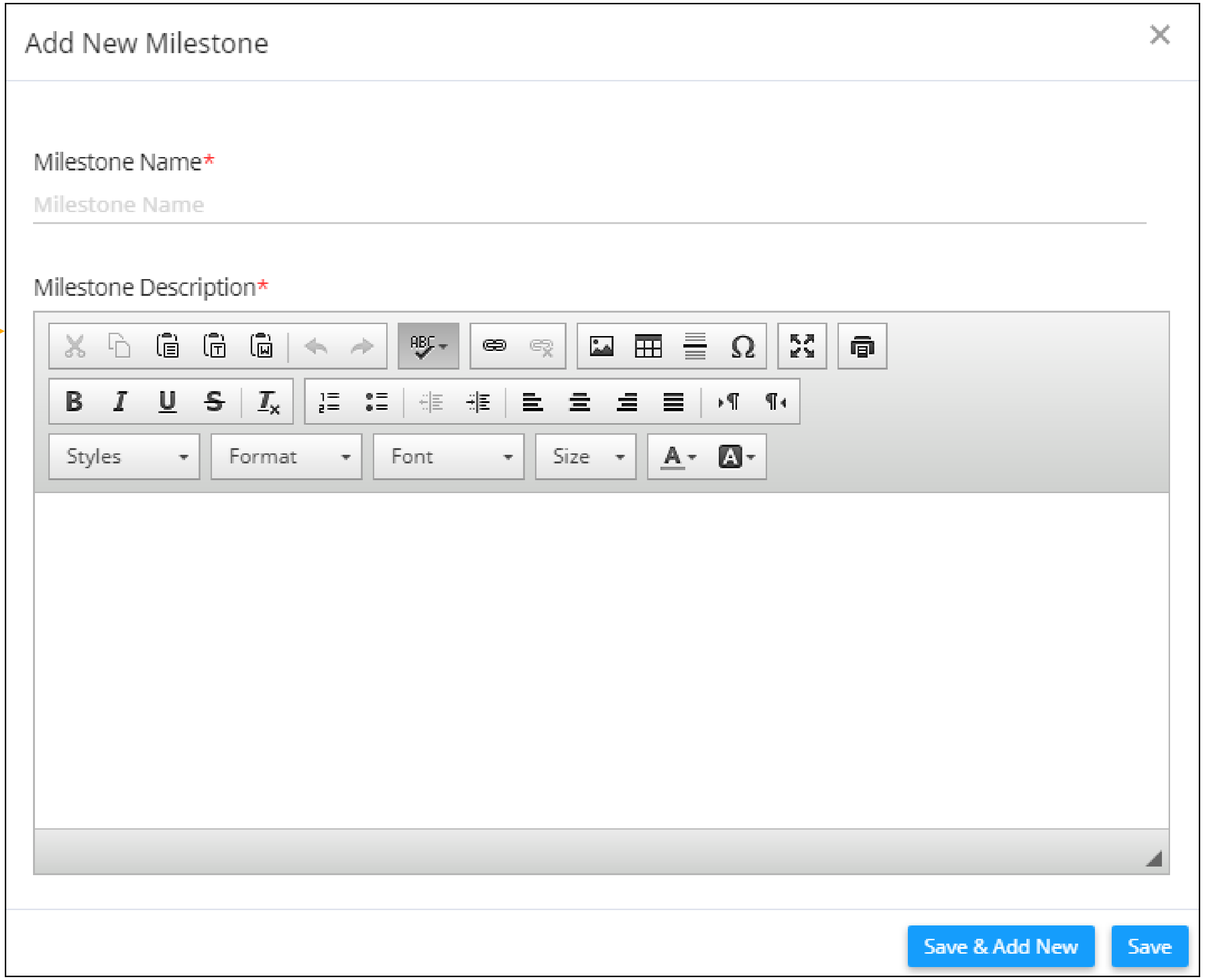


Select the required supplier contact

Remove the supplier

Milestones

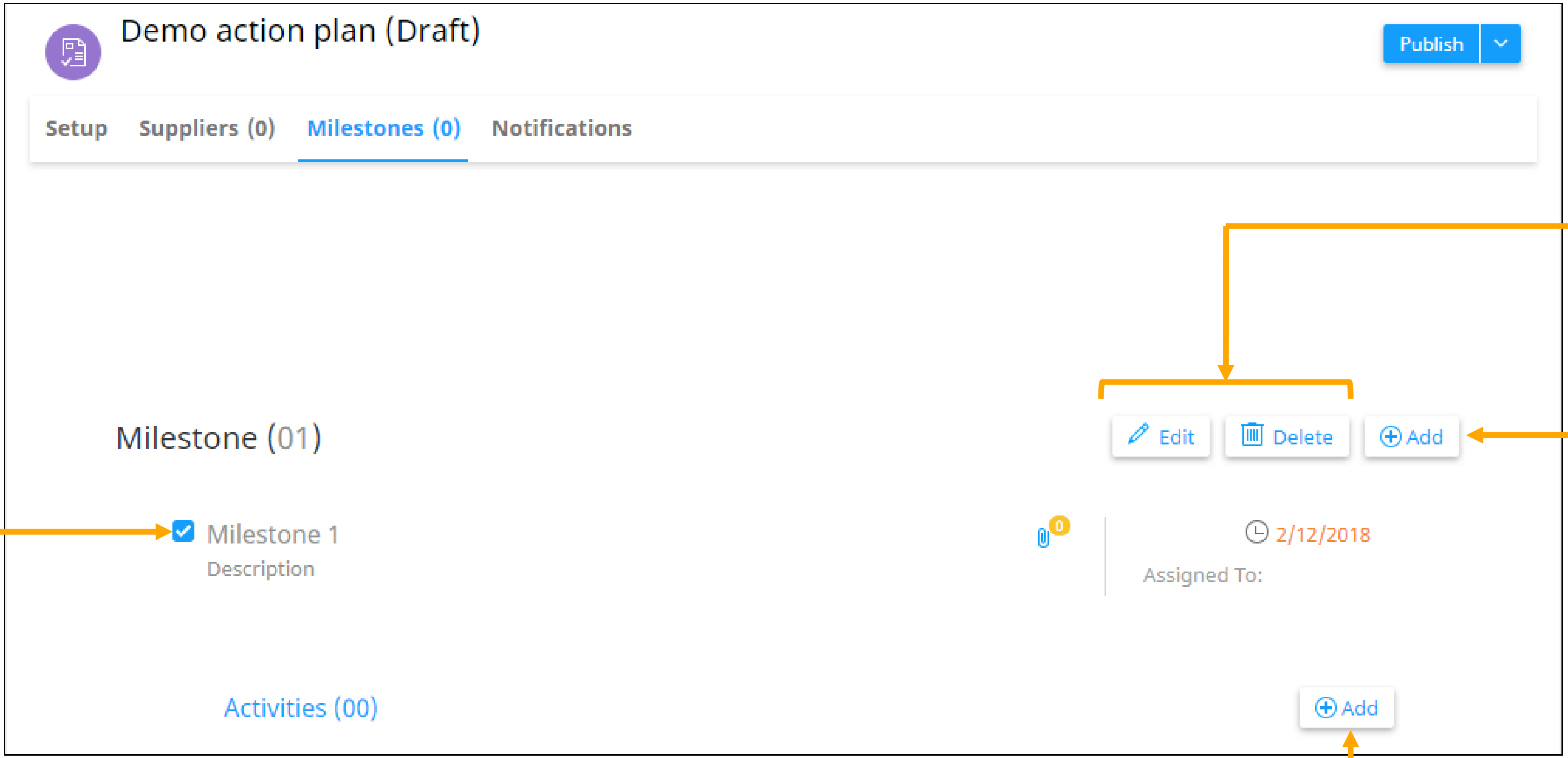
On the Milestones tab, click **Add** to add milestones.



On the Add New Milestone pop-up, fill in the required details such as the milestone name, description, due date, assignee, and attachments (if any). Click **Save** or **Save & Add New** to save the milestone and add another one.

Milestones

Existing/added milestones are displayed on the Milestones tab, as shown below:



Edit or delete the selected milestone.

Edit or delete the selected milestone.

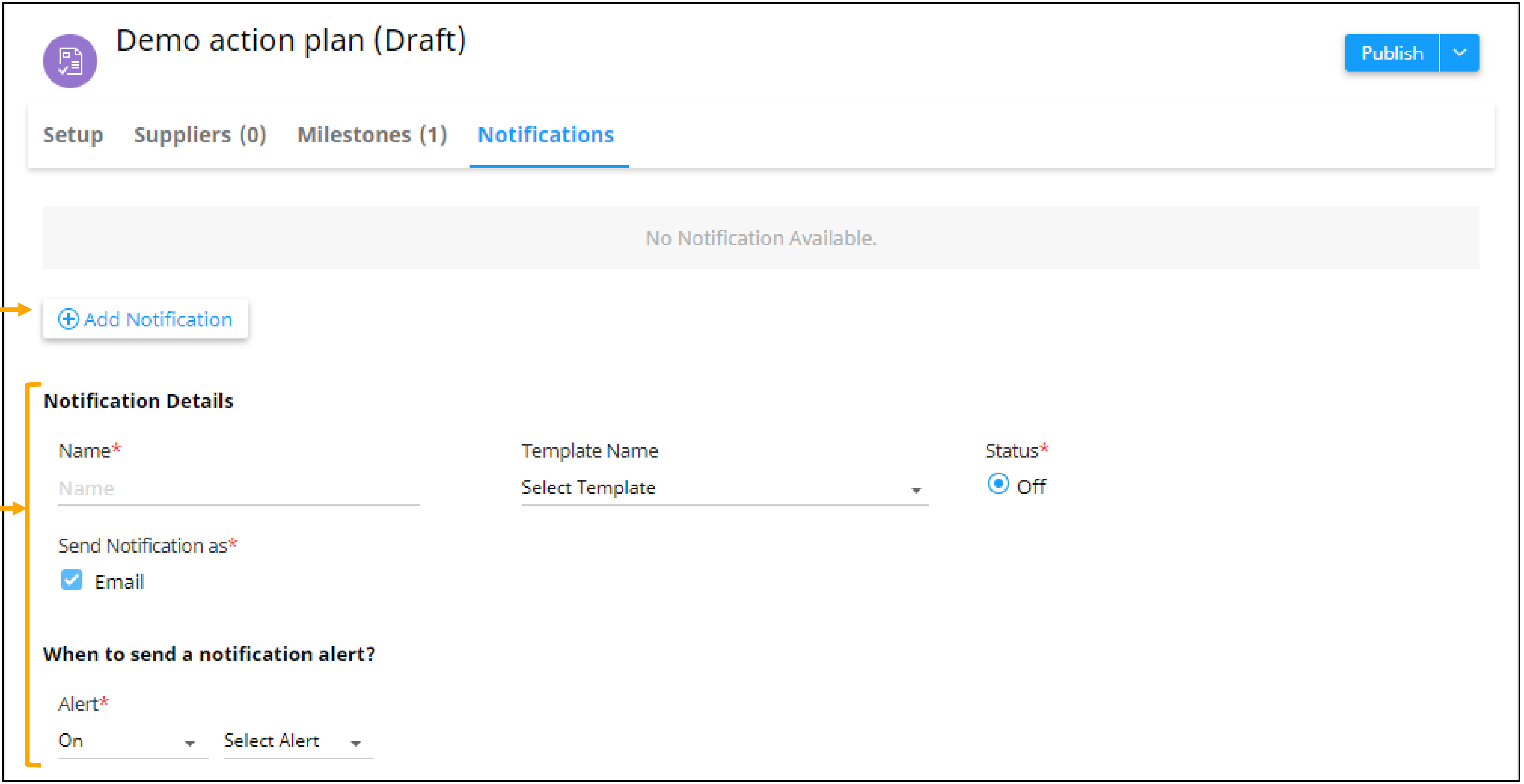
Select the milestone to made modifications to it

Add an activity within the milestone

The Notifications tab enables you to set up email notifications to be sent to the concerned parties.

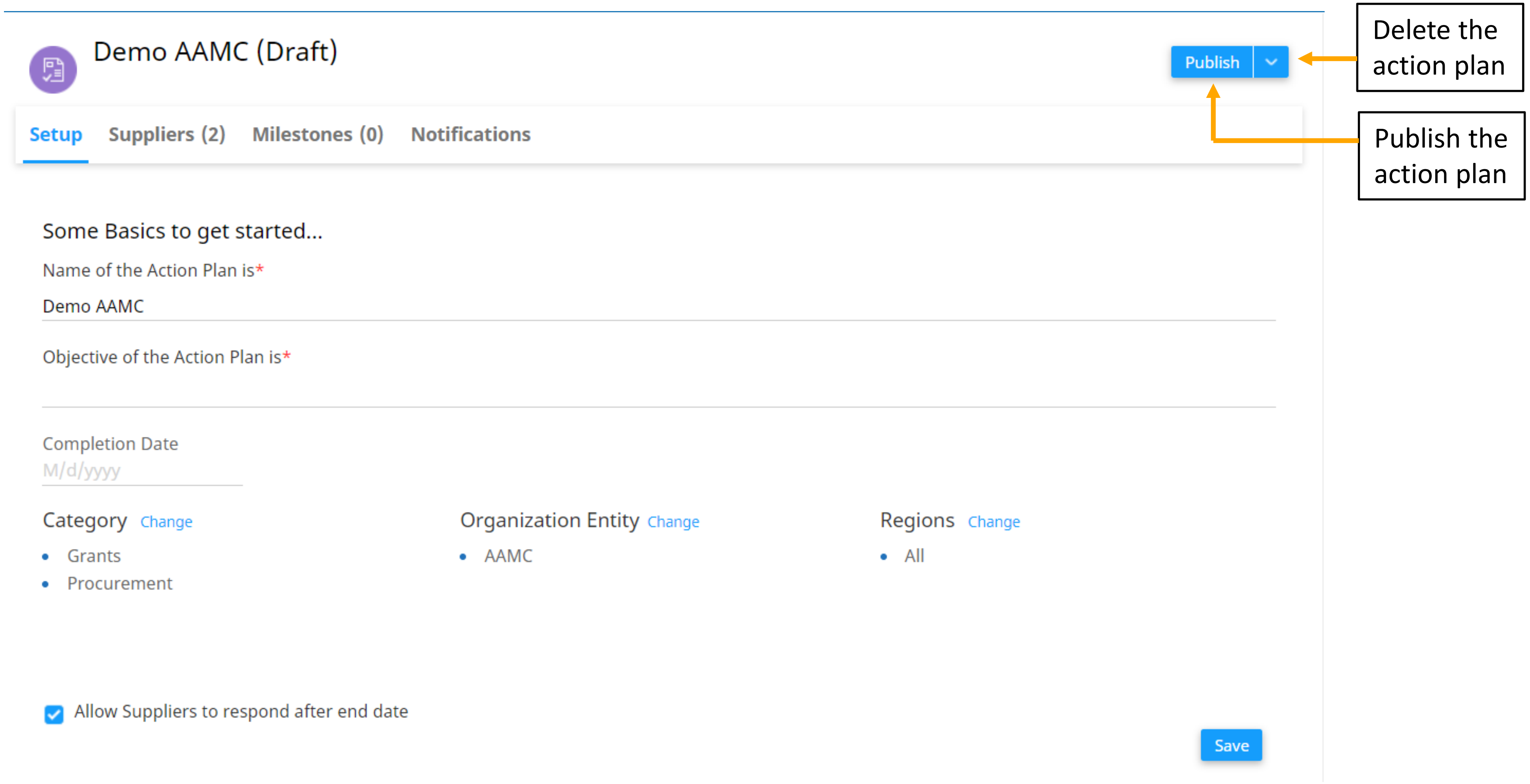
Click **Add Notification**

Fill in the required details and click **Save**



Publishing the Action Plan

After filling in all the required details on all the tabs, you can publish the action plan using the option provided on the top-right corner.

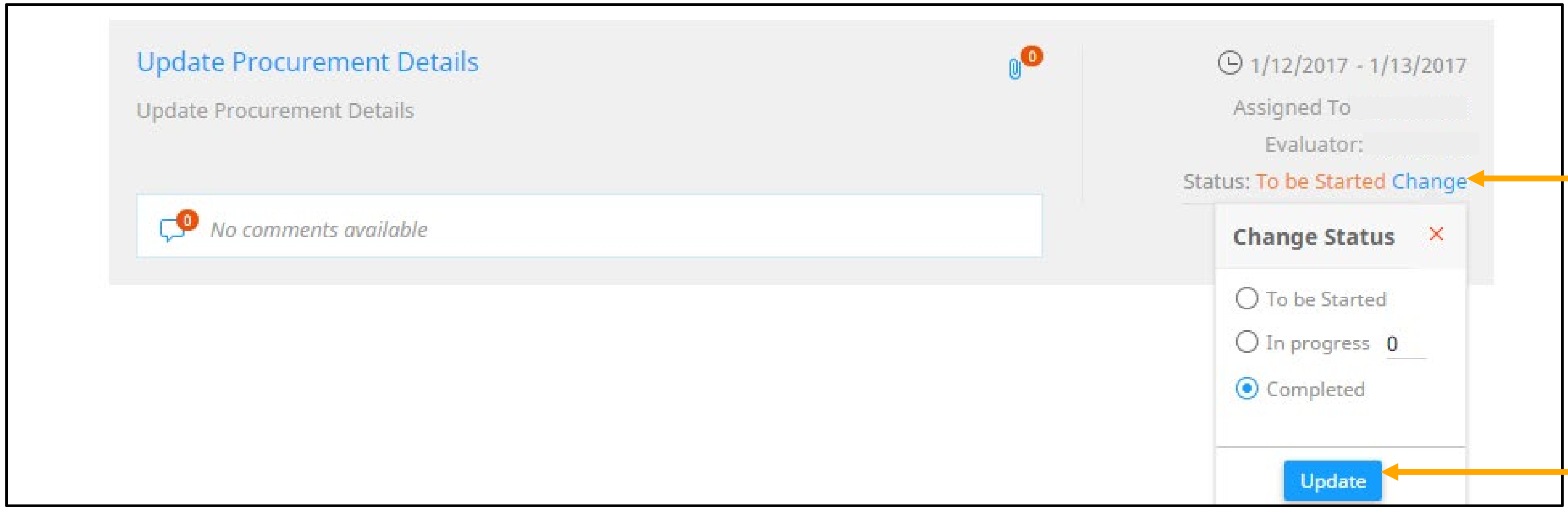


Achieving Milestones and Activities

After the action plan is published, as an assignee for a milestone, you can change the status of the milestone and activity assigned to you, to indicate them as achieved.

Click **Change** to update the milestone status

Select **Achieved**, provide Achieved on date, and click **Update**

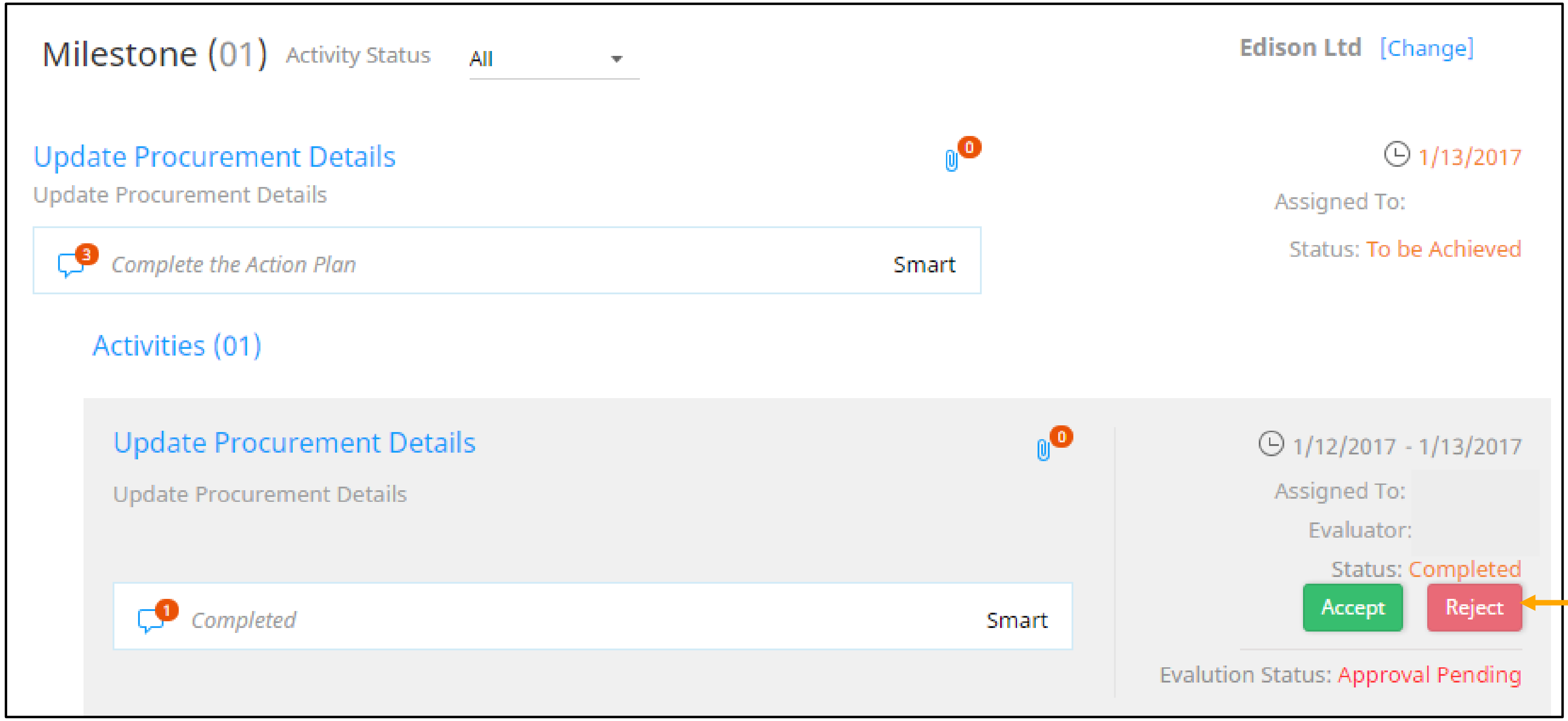


Click **Change** to update the activity status

Select the required option and click **Update**.

Approving Milestones

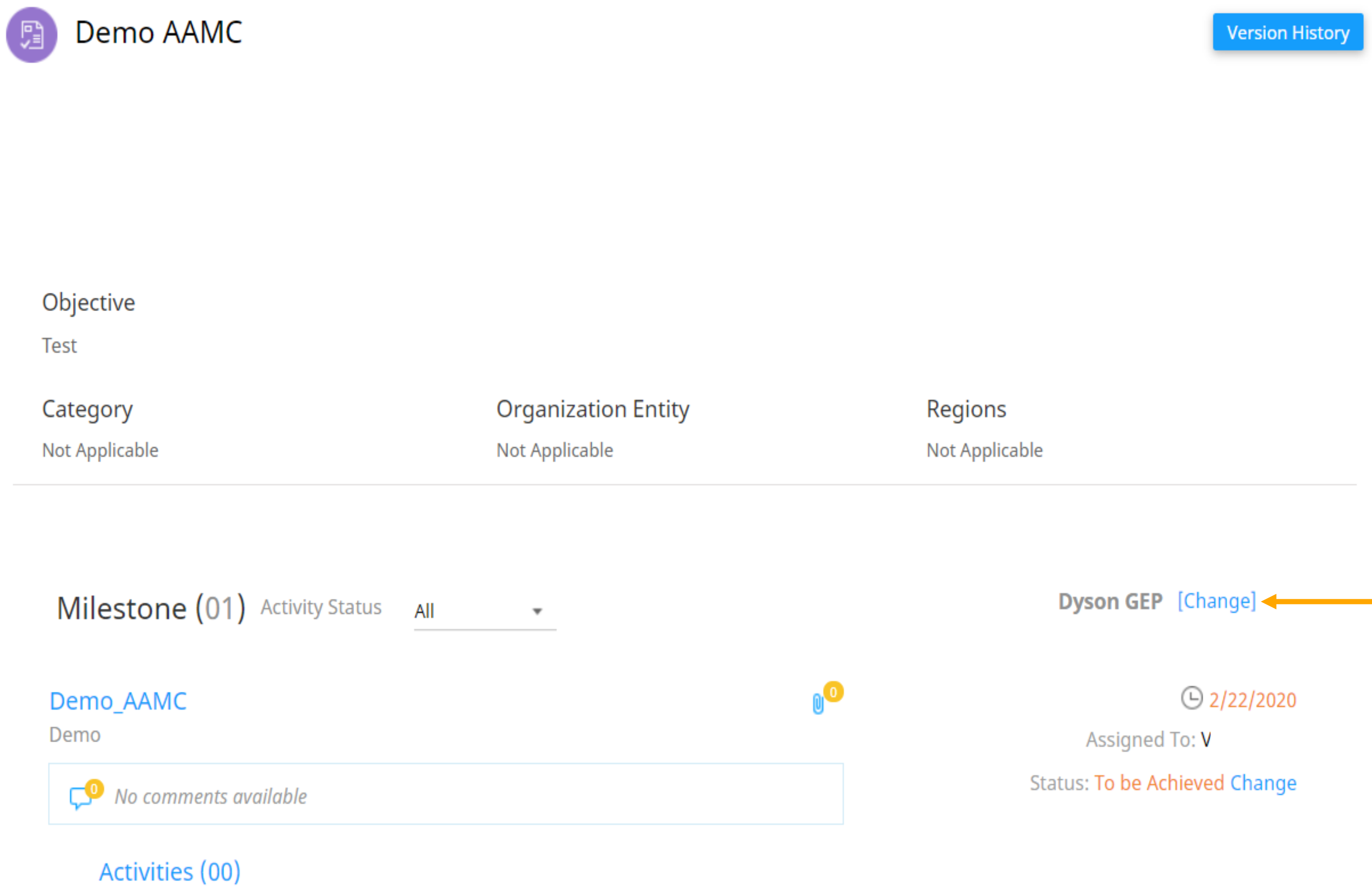
If the activity approval workflow is set up, then as an approver of an activity, you decide whether to approve or reject the status change made to the activity.



Accept or Reject the activity status change

Viewing Responses to the Action Plan

After the action plan is published and supplier responses are received, click **View Response** on the top-right corner to view the responses.



View the version history of the action plan

Select the required supplier to view their responses