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## 20-40 Doer-Seller Module Your Gameplan

**1.** To add someone to your Gameplan, select **Yes** in the **In Gameplan** drop down menu in your **20-40 List**.

In Gameplan	Date added to Gameplan	Status
Yes	05-18-2021	Green
No	05-18-2021	Green
Yes	05-14-2021	Green
Yes	05-16-2021	Green
Yes	04-15-2021	Red
Yes	05-01-2021	Amber
No		Green
No		Green
No		Green

**2.** Once added, the date you added the record will be shown. The status icons represent the time that the record has spent in your **Gameplan**:

- **Green** – Record is in your 2 week Gameplan
- **Amber** – Highlights that the record has been in your Gameplan for over 2 weeks.
- **Red** – Highlights that the record has been in your Gameplan for over 4 weeks.

**3.** Your **20-40 2 Week Gameplan** can be added to your Homepage Dashboard. The Dashboard shows the records in your **Gameplan**, what type of record they are and their priority. The **Last Activity** shows the last date and what actions you had with that record and the **Next Activity** shows the date of next scheduled action you have with them. To view the details of the activity click the dates in the **Dashlet**.

Type	Related to	Priority	Last Activity	Next Activity	Actions
Shield	AAB Investment Advisors LLC	A			[Icons]
Gear	Alan Peck	A			[Icons]
Person	Ivor Bank	A	05-17-2021	05-18-2021	[Icons]
Person	Don Trump	A			[Icons]
Group	Ive Ajobere	B			[Icons]
Person	Bob Geldof	C			[Icons]

**4.** In the **Actions** section of your **Gameplan Dashlet** you can; **Schedule Calls, Create Tasks, Schedule Meetings** and **Create Opportunities** with people in your Gameplan by clicking their respective icon. The different colours of the **All Opportunities** icons represent different opportunity statuses for each record;

- **Grey** - No opportunities exist
- **Red** - Only lost opportunities exist
- **Amber** - No active opportunities but there are one or more Closed Won opportunities
- **Blue** - Active Opportunities Exist

Actions
[Phone] [Calendar] [Calendar] [Plus] [Plus] [X]
[Phone] [Calendar] [X]
[Phone] [Calendar] [Plus] [Plus] [X]
[Phone] [Calendar] [Plus] [Red Plus] [X]
[Phone] [Calendar] [X]
[Phone] [Calendar] [Plus] [Yellow Plus] [X]

**5.** In each Lead, Person and Organisation record you can view a full 20-40 history of the record in the **20-40 Full History Subpanel**.

User	Event Occurred At	Event Type
Administrator	05/24/2021 12:03pm	Added to Gameplan
Administrator	05/24/2021 12:03pm	Priority changed to b
Administrator	05/24/2021 12:03pm	Added to 20-40 List for Administrator
20-40 User	05/17/2021 05:57am	Removed from list for 20-40 User
20-40 User	05/17/2021 04:01am	Added to Gameplan
20-40 User	05/14/2021 10:34am	Added to list for 20-40 User