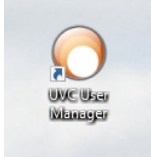
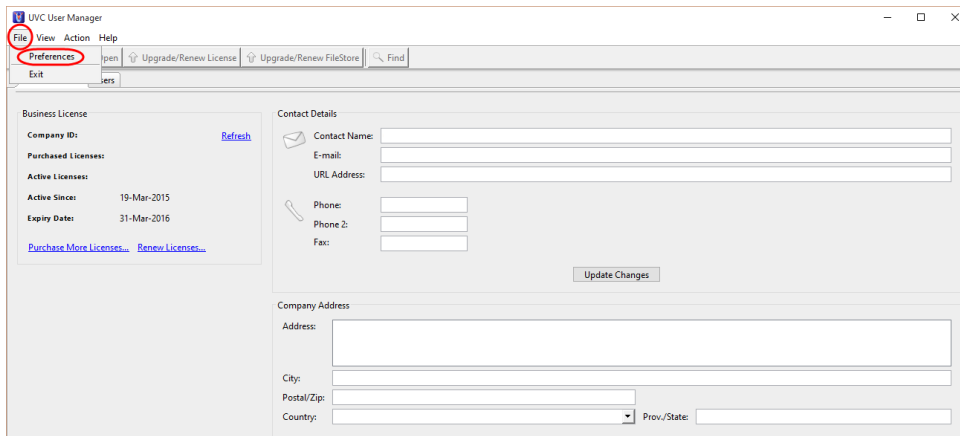


## How to Create a Service Profile Template

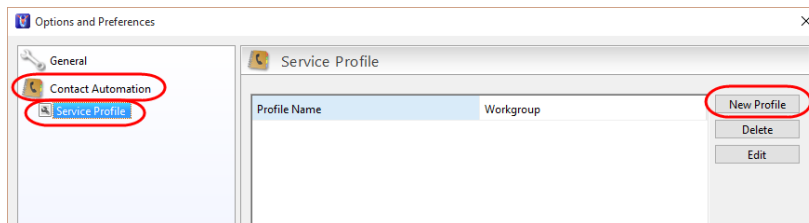
1. First you will need to download and install the **UVC User Manager** application on your workstation.



2. Once you login to UVC User Manager you will click on **File** and **Preferences**.

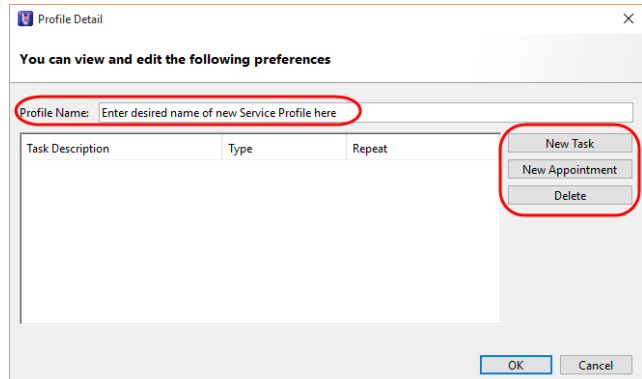


3. Click on **Contact Automation** and **Service Profile**. This is the screen where you can create a **New Profile** or **Delete** a profile or even **Edit** a service profile. Click on the **New Profile** button to create a new service profile.



4. On this following window you will enter the name of your service profile under **Profile Name**. You also have the ability to add a **New Task** or a **New Appointment** to this service profile or even **Delete** a task or appointment on an existing profile if it's no longer needed.

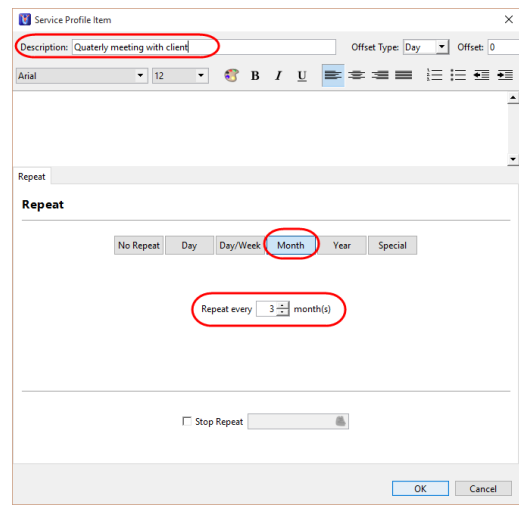
As a best practice we recommend creating **Tasks** rather than appointments because you will have the ability to select a **Recipient** to do follow up/complete this task. Also the **Task** will always be in your "to do" items and you will be reminded if the status is not completed as oppose to an **appointment** which is only setup as an allocated time slot in your calendar that should be dealt with at that specific time. If the **appointment** date and time passes, no reminder will be provided that it was not dealt with.



In this scenario I will name my service profile AAA and create a new appointment.

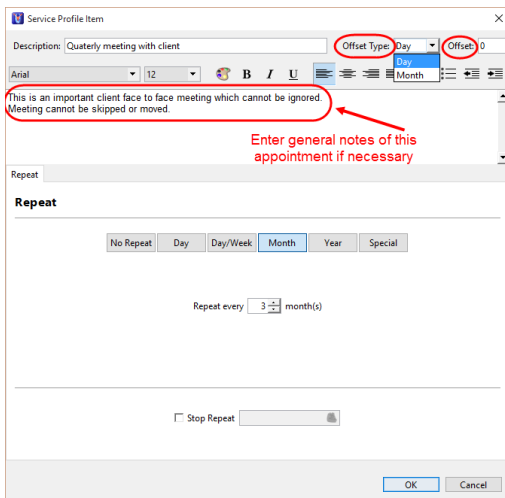
- When I click on the **New Appointment** button (seen above) you will get the following pop-up window. You will be able to add a description to the new appointment you want to create which will be linked to your AAA service profile and **Repeat** the appointment as you choose (Day, Day/Week, Month, Year or Special).

In my scenario I want to create a AAA service profile which will be defined by quarterly meeting with the client (every 3 months).

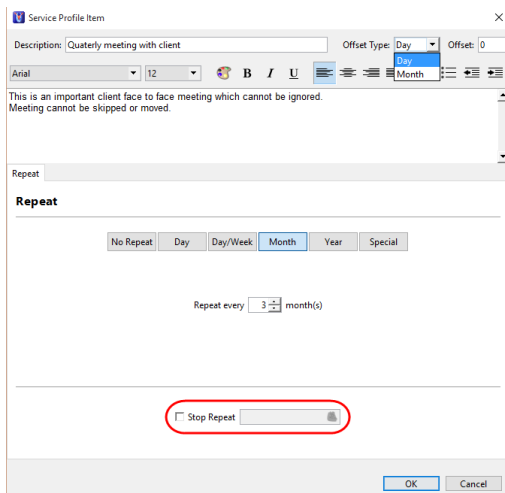


You also select an **Offset Type** which you can choose between the number of **Days** or **Months**. Because the appointments and tasks are created at the beginning of the same day it's possible that, in scenarios where you have quarterly calls and yearly meetings, after a year the phone call and meeting will be on the same day. This feature "offsets" the two appointments by the selected number of Days or Months. This will avoid any conflict between each appointment.

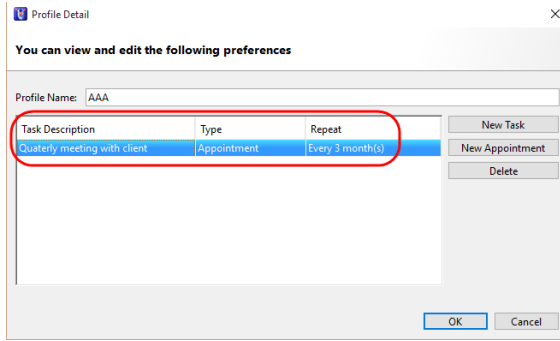
You can also add a general note which will be directly linked to the appointment you are creating.



**Note:** There's an option to **Stop Repeat** (the appointment and/or task). If no **Stop Repeat** date is selected then once the current one is marked as **Completed** a new one will be created (which is ideally what you want to reoccur again but we gave you the option in case).

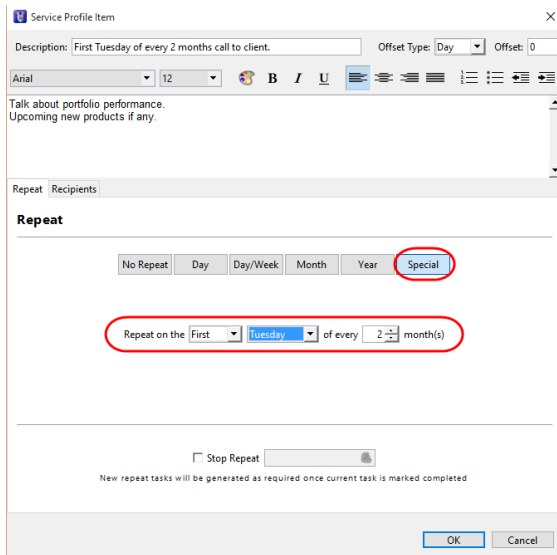


- Once you are done creating your new **Appointment** and you can click on the **OK** button.
- Your new **Appointment** will be added to the service profile.



- You can also add a **New Task** to the service profile. A pop-up window will open up where you can add your new task which will be associated to your AAA service profile.

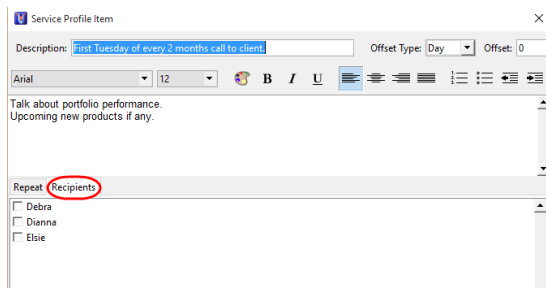
In this scenario I'll be adding a task which will be repeated every first Tuesday of every 2 months. This type of unique "setup" can be created under the **Special** tab.



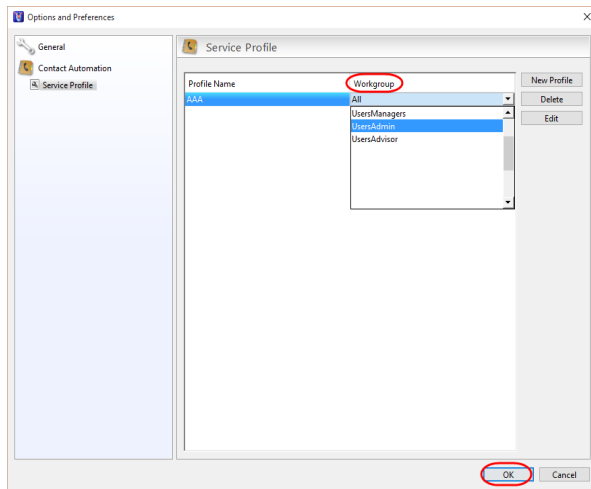
- You will also have an option to select **Recipients** for these tasks if you wish. This option is available only when you create Tasks under a Service Profile.

As a best practice we recommend creating **Tasks** rather than appointments because you can assign a recipient to follow up/complete the task. **Tasks** are also shown as a "to do" item in your calendar and it will remain such until it's completed. The **Task** can be pushed for a few days or week until you have the time to complete it but you will always have a reminder that you haven't dealt with it until the status changes to completed.

By default the owner of the "contact" (of which you will select the Service Profile) will be the user who will have the tasks added in their calendar. But if you want to add another user which you want to assign and follow up on these tasks then you can select the user under the **Recipients** tab.



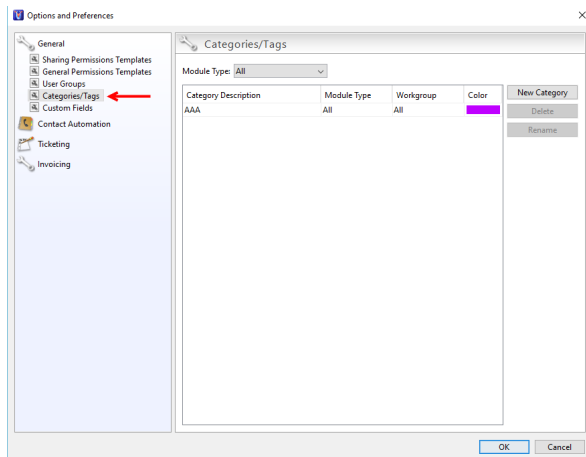
- Once you have added your new **Task** click on the **OK** button.
- On the main Service Profile window screen you will be able to apply which **Workgroup** will be able to see and select this profile from the client's contact detail screen. If you want to apply it to everyone leave the option to **All**. If you prefer to apply this service profile to specific users within a workgroup then select it from the drop down menu.



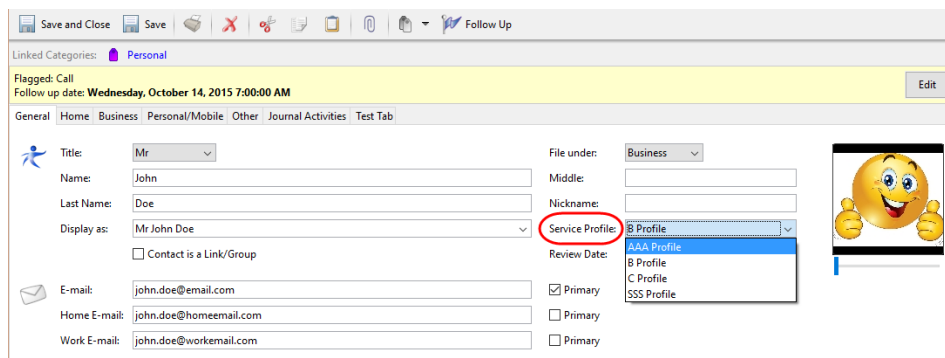
Click on the **OK** button to save your service profile.  
 Now you have a AAA service profile with a quarterly appointment meeting and a task to call the contact every first Tuesday of every 2 months.

- Your next step will be to create the Category/Tag **AAA** in User Manager. This creation of new category/tag will allow you to **differentiate** tasks/appointments created by the Service Profile versus tasks/appointments created by a user.

Go to **File -> Preferences**  
 Then click on **Category/Tags**



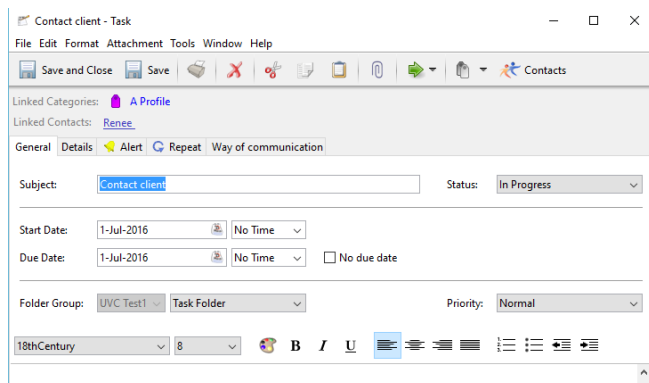
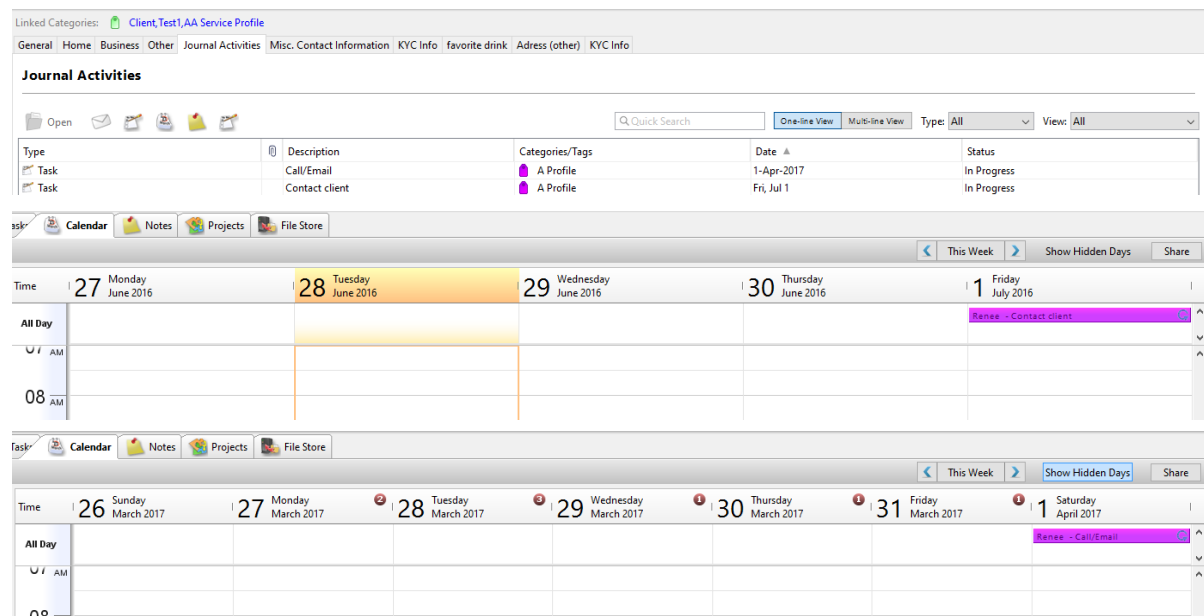
- Click on **New Category**.  
 Under the **Category Description** field enter the name of your service profile exactly how you spelled in Step #4. In our scenario it will be **AAA**.
- Next select a **Color** for that new Category/Tag.  
 Click on the **OK** button to save your changes.
- Now you can access your UVC application, go under the **Contacts** tab and “edit” a contact.  
 Select the appropriate **Service Profile** (which you have created in step#1 through step#10) which will apply the appointments and tasks you created on the service profile triple AAA.



Take note that the **Review Date** (the start date that the service profile will use to create the tasks/appointments within your service profile template) should be the first initial review meeting with the client. Test different scenario to make sure the tasks/appointments do have the correct day/week/month or year setup and the offset is properly configured.

Typically user's enter the contacts birthday for the **Review Date**. If the contacts birthday is **April 15<sup>th</sup> 1975** then the **Review Date** would be **April 15<sup>th</sup> 2016** (select the date of the contacts birthday but using last years year). If you rather input a different date just make sure the date is **in the past** and not the future.

After selecting a Service Profile and a Review Date you will be able to see the tasks/appointments in the Journal Activity (notice the purple tag that you created in steps# 11 through 13) and under the calendar. This tag will differentiate the tasks/appointments created by the Service Profile versus what a user manually created in UVC.



You can create as many service profiles as you judge necessary but you can only link **one** service profile per contact.

**Note:** The option **Service Profile** (seen in step# 11) will not be displayed under any contact if **NO** service profile template exist under the UVC User Manager. Once there's at least one service profile template created the **Service Profile** option will be displayed under each contact.

**Also take Note:** In the future if a contact has, for example, a AAA service profile and you change the contact's profile to a AA service profile, all historical appointments and tasks, under the AAA profile, will be historically saved and any new appointments and/or tasks linked to the triple AAA profile will be deleted and will be replaced by the appointments and/or tasks linked to the AA service profile (the new service profile template you selected).

## Example of a service profile

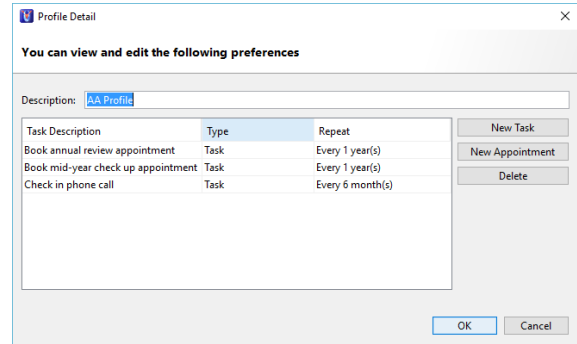
In the below AA Service Profile we have set up 3 tasks as follows with the options described.

1. Annual Review appointment - repeat every 1 year - no offset
2. Mid-Year check up appointment - repeat every 1 year - offset 6 months
3. Check-in phone call - repeat every 6 months - 3 month offset

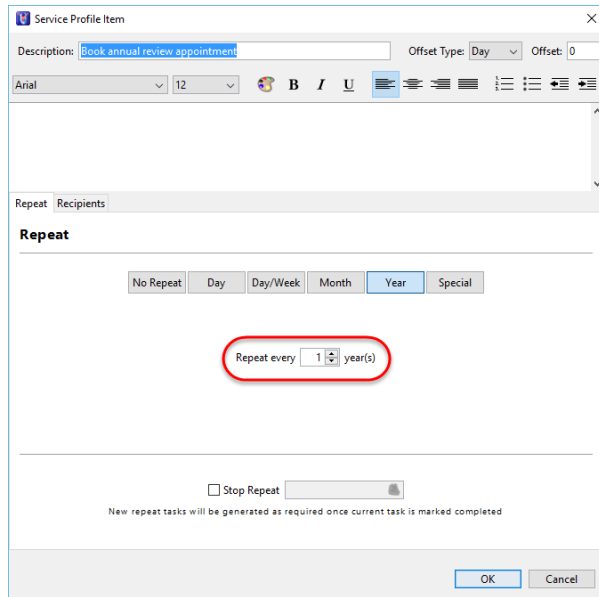
In this scenario the **Review Date** is set for January 1<sup>st</sup> 2016.

Please note that the service profile was set on the contact detail screen on April 14<sup>th</sup> 2016. Knowing this you now know that the **Review Date** is in the past.

Three tasks are created for each of my above reminders I want to setup in my calendar for the **AA Profile**. The details of each of these 3 tasks is explained below



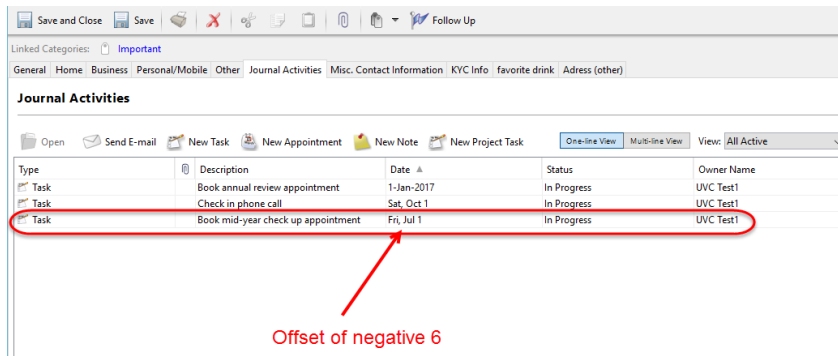
My **annual appointment** will need to be repeated yearly. Therefore I select the **Year** option and a 1 year. No offset is required.



My **mid-year appointment** happens every single year but every 6 months.

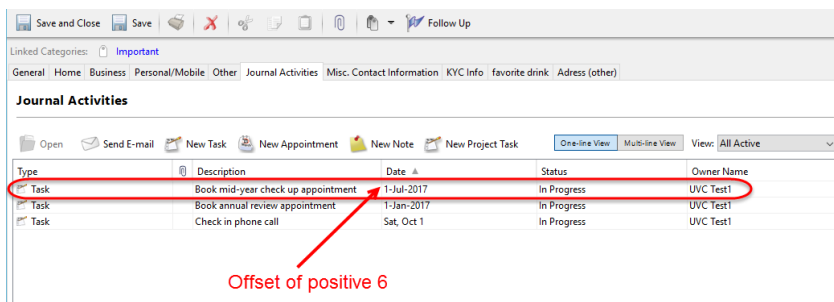
Because my Review Date is set to January 1<sup>st</sup> 2016 I want to have my first mid-year appointment to happen 6 months from that review date which should be July 1<sup>st</sup> 2016.

In this case I will add an offset of negative 6 (- 6). This negative 6 would negate 6 months from the 1 year.

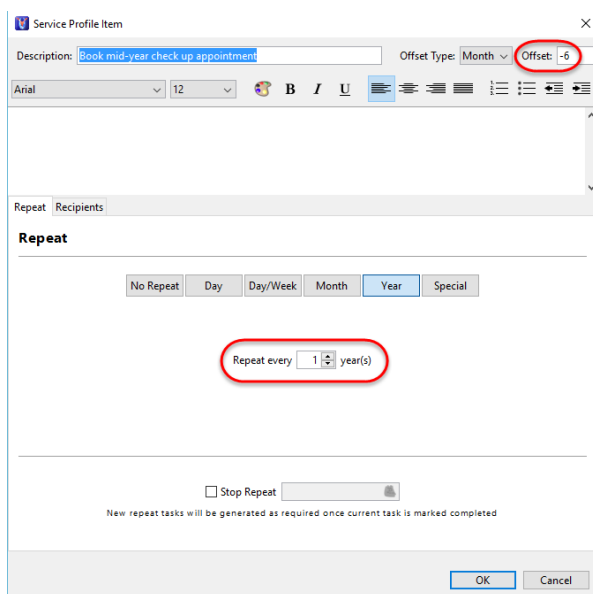


If I did not add a negative 6 and simply a positive 6 I would end up having a mid-year appointment on July 1<sup>st</sup> 2017.

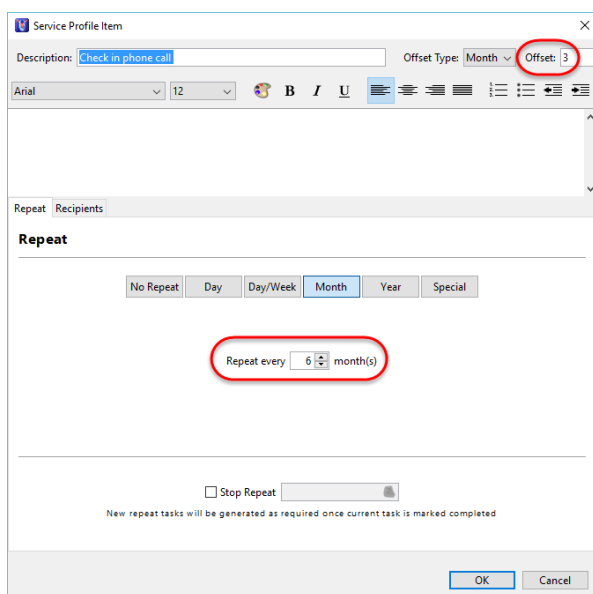
In this scenario you can see how important the Review Date is and how it reflects into your next appointment. Of course if your attention was to have you mid-annual meeting to be on July 1<sup>st</sup> 2017 then the offset would be positive. It would be set 1 year after your Review Date (Jan 1<sup>st</sup> 2016) plus with a positive offset value of 6 months.



The screen below is what I would setup if I wanted my mid-annual appointment to be on July 1<sup>st</sup> 2016.



Finally for my **check-in phone calls** I want them to occur every 6 months and I want the first check-in phone call to happen on October 1<sup>st</sup> 2016.





Once my template is created and I have select the **AA Profile** on my contact with a **Review Date of January 1<sup>st</sup> 2016** I should see this under the contact's Journal Activity:

The screenshot shows a CRM contact record for 'David Palmer'. The 'Service Profile' is set to 'AA Profile' and the 'Review Date' is '1-Jan-2016', both of which are circled in red. Below the contact information, the 'Journal Activities' section is visible, showing a list of tasks.

**Journal Activities**

Type	Description	Date	Status	Owner Name
Task	Book annual review appointment	1-Jan-2017	In Progress	UVC Test1
Task	Check in phone call	Sat, Oct 1	In Progress	UVC Test1
Task	Book mid-year check up appointment	Fri, Jul 1	In Progress	UVC Test1