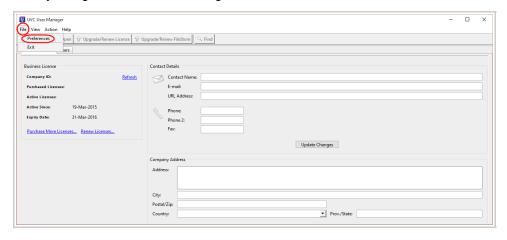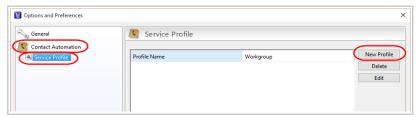**How to Create a Service Profile Template**

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

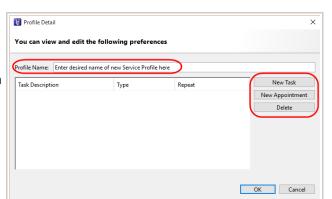2. Once you login to UVC User Manager click on **File -> Preferences**.

3. Click on **Contact Automation** and **Service Profile**.
   This screen will allow you to create a **New Profile, Delete** or **Edit** a service profile.
   Click on the **New Profile** button to create a new service profile.

4. Under the Profile Name filed enter the name of your service profile you want to create.

   You have the ability to create 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.

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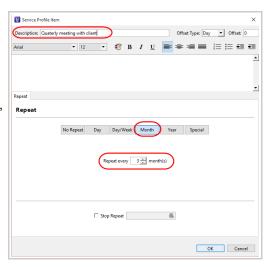

   In this scenario I will name my service profile AAA and create a new appointment.

5. When I click on the **New Appointment** button (seen above) you will see the following pop-up window.

You will be able to add a **description** to the new appointment.
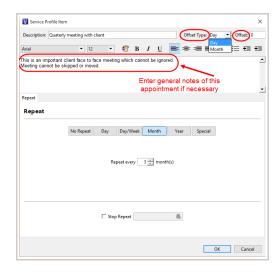
Repeat the appointment as you choose (Day, Day/Week, Month, Year or Special).

In my scenario I want to create a AAA service profile which will be defined by quarterly meeting with the client (every 3 months).
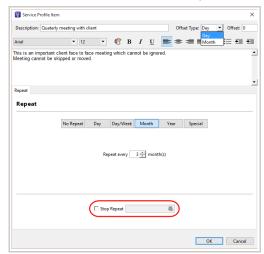
You also select an **Offset Type** which you can choose between the number of **Days** or **Months**. Because the appointments and tasks are created at the beginning of the same day it's possible that, in scenarios where you have quarterly calls and yearly meetings, after a year the phone call and meeting 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.
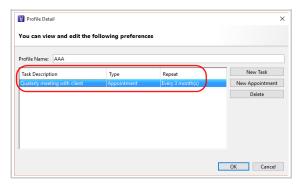
You can also add a general note which will be directly linked to the appointment you are creating.

*Note: There's an option to **Stop Repeat** (the appointment and/or task).*
*If no **Stop Repeat** date is selected then once the appointment or task is marked as **Completed** a new one will be created. Leave that option uncheck if you want your appointments/tasks to reoccur.*
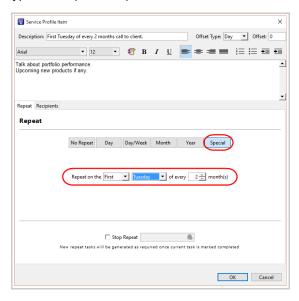
6. Once you are done creating your new **Appointment** click on the **OK** button.

7. Your new **Appointment** will be added to the service profile.

8. 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.
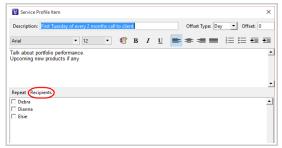
    In this scenario I'll be adding a task which will be repeated every first Tuesday of every 2 months. This type of unique "setup" can be created under the **Special** tab.
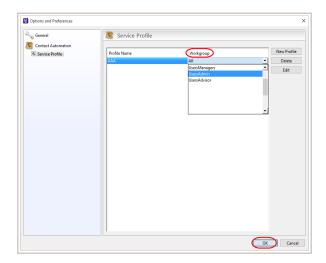

9. You will also have an option to select **Recipients** for these tasks if you wish. This option is available **only** when creating Tasks under a Service Profile.

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

    By default the owner of the "contact" will be the user who will have the tasks added in their calendar. But if you want to select a different user that will be assigned this task then select the user under the **Recipients** tab.

10. Once you have added your new **Task** click the **OK** button to save.

11. On the main Service Profile screen you have the ability 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 a specific workgroup select it from the drop down menu.
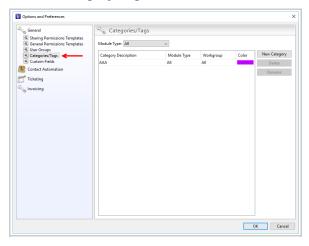

Click on the **OK** button to save your service profile.
Now you have a AAA service profile with a quarterly meeting appointment and a task to call the contact every first Tuesday of every 2 months.

12. Your next step is to create the Category/Tag **AAA** in User Manager. Creating a 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**
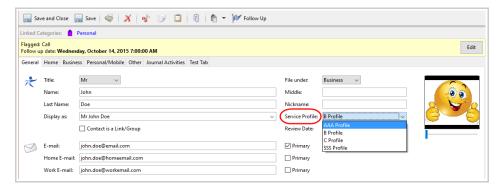   Click on **Category/Tags**

13. 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**.

14. Next select a **Color** for that new Category/Tag.
    Click on the **OK** button to save your changes.

15. Now login to UVC.
    Go to your **Contacts Module** and "edit" a contact.
    Select the appropriate **Service Profile** (which you have created in step #1 through #10) relevant to your selected contact.
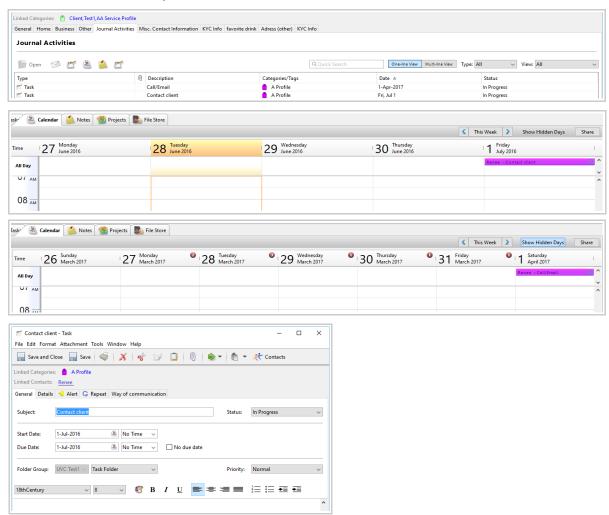
16. Select a **Review Date**.
    The **Review Date** (the start date that the service profile will use to create the tasks/appointments within your service profile template) should always be **in the past** and never in the future. Ideally be unique to each client. As a tip we recommend selecting the date that you have last met with the client.

    Click on **Save and Close** to save your changes.

    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 step #12 through #14) and under the calendar. This tag will differentiate the tasks/appointments created by the Service Profile versus the appointments and tasks created manually.

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.

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. They will be replaced by the appointments and/or tasks linked to the AA service profile (the new service profile template you selected).

Examples of a service profiles

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
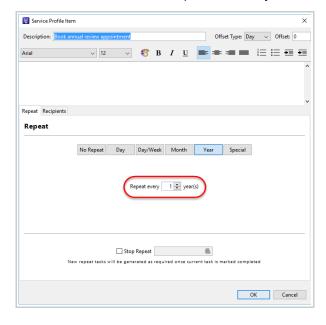
In this scenario the **Review Date** is set for January 1st 2016.
Please note that the service profile was set on the contact detail screen on April 14th 2016. Knowing this you now know that the **Review Date** is in the past.

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 1st 2016 I want to have my first mid-year appointment to happen 6 months from that review date which should be July 1st 2016.
In this case I will add an offset of negative 6 (- 6). This negative 6 would negate 6 months from the 1 year.
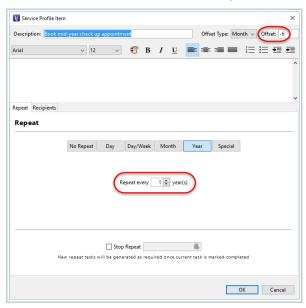
If I did not add a negative 6 and simply a positive 6 I would end up having a mid-year appointment on July 1st 2017.

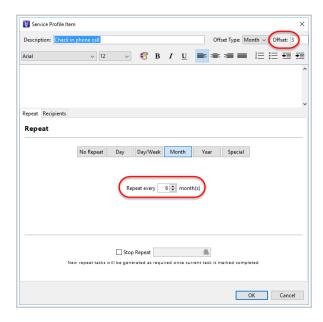In this scenario you can see how important the Review Date is and how it reflects into your next appointment. Of course if your attention was to have you mid-annual meeting to be on July 1st 2017 then the offset would be positive. It would be set 1 year after your Review Date (Jan 1st 2016) plus with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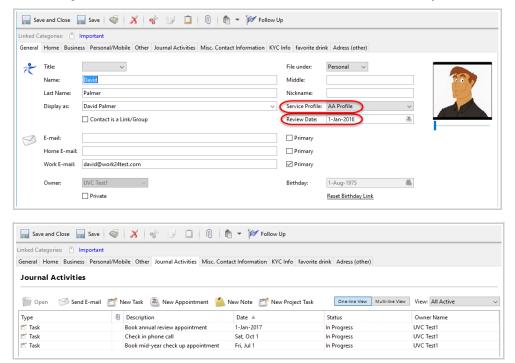

The screen below is what I would setup if I wanted my mid-annual appointment to be on July 1st 2016.

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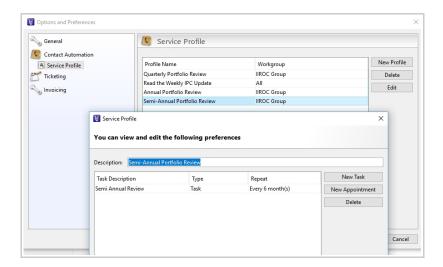
Once my template is created and I have select the **AA Profile** on my contact with a **Review Date of January 1st 2016** I should see this under the contact's Journal Activity:
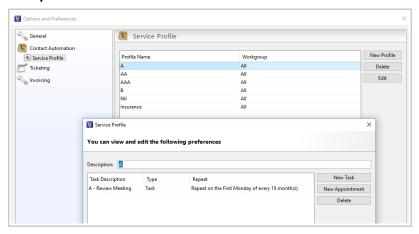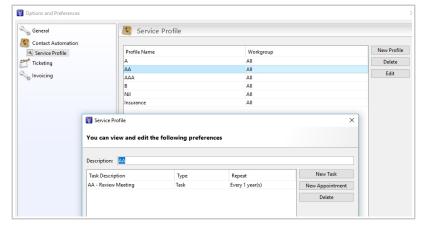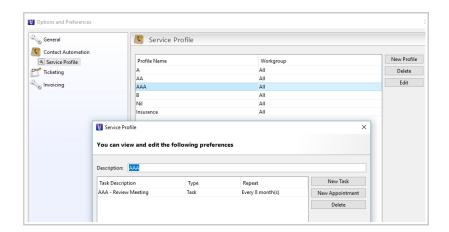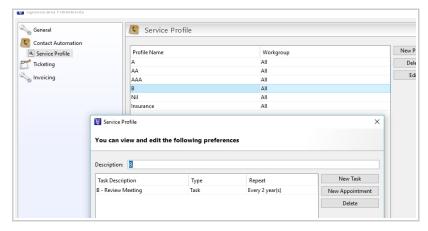
Example #1

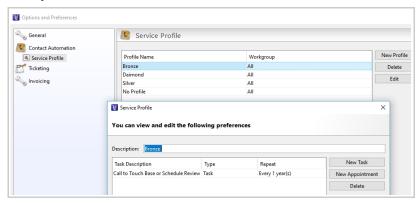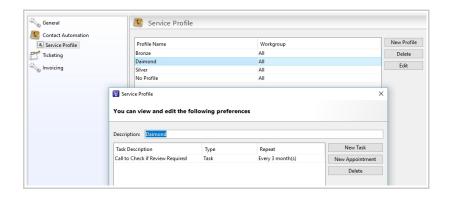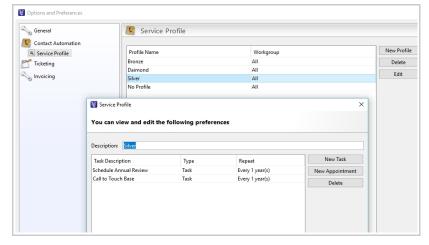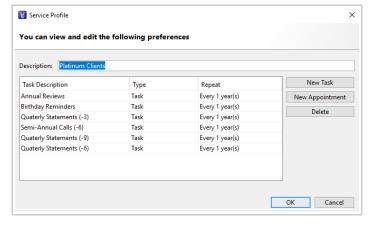**Example #2**

Example #3

Example #4

In this example the branch wanted an Annual Review, Birthday Greeting, Semi-Annual Calls and Quarterly Statements. All four tasks would be based on contacts birthday date which they would select in the Review Date field.

Annual Review is set up every year.
Birthday Greeting set up every year.
Semi-Annual Calls is setup every year but with an offset of -6 months. This will allow for the Annual Review and the semi-annual calls to never overlap each other.

Quarterly Statements are also setup on a yearly basis but with a monthly negative offset so they can be created every 3 months. Notice that they created tree separate tasks for the Quarterly Statements.