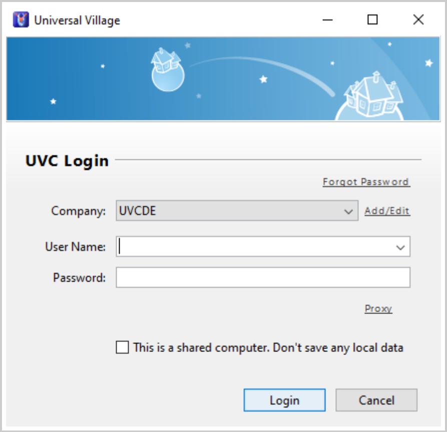
universal
village software

How to create an Action Template

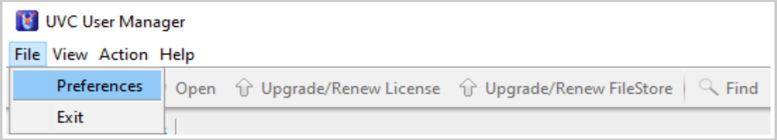
The new **Action Template** option will allow for the creation of templates with different sequences of tasks and/or appointments. Once you have created these action templates they can be selected under each client and they will be manually triggered based on a selected start date.

1. Log in to **User Manager**.

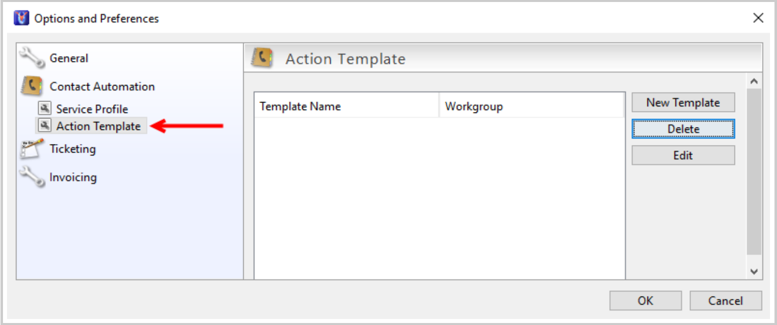

Universal Village
UVC Login
Forgot Password
Add/Edit
User Name:
Password:
Proxy
☐ This is a shared computer. Don't save any local data
Login
Cancel

Company: UVCDE

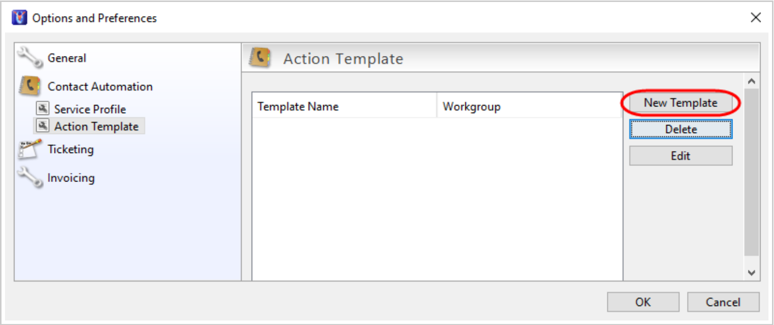
2. Click on **File -> Preferences**.


UVC User Manager
File
View
Action
Help
Preferences
Exit
Open
Upgrade/Renew License
Upgrade/Renew FileStore
Find

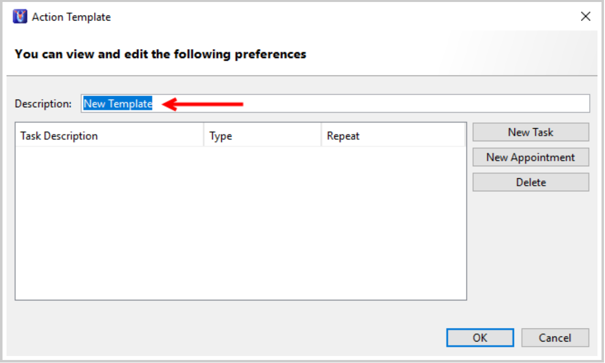
3. Click on **Contact Automation -> Action Template**.


Options and Preferences
General
Contact Automation
Service Profile
Action Template
Ticketing
Invoicing
Action Template
Template Name
Workgroup
New Template
Delete
Edit
OK
Cancel

4. Click on **New Template**.


Options and Preferences
General
Contact Automation
Service Profile
Action Template
Ticketing
Invoicing
Action Template
Template Name
Workgroup
New Template
Delete
Edit
OK
Cancel

5. Add a **description** to your action template.


Action Template

You can view and edit the following preferences

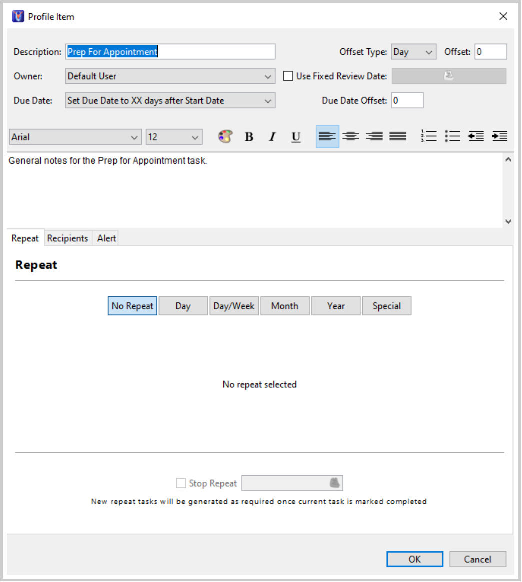
Description: New Template

Task Description	Type	Repeat

New Task
New Appointment
Delete
OK
Cancel

6. You have the ability to create either new tasks or new appointments for this new action template. in this example we will create three tasks and one appointment. These actions will be part of an internal procedure which needs to be conducted before the client's meeting.

   Enter a **description** for the new tasks or appointment.
   Offset type option can be used to offset the task or appointment to be created X days or months before or after your selected start date.
   Enter any **general notes** if necessary.
   Assign a **recipient** for the task or appointment if needed. If no recipient is selected the task or appointment will be created under the owner of the contact.


Profile Item

Description: Prep For Appointment
Offset Type: Day
Offset: 0
Owner: Default User
☐ Use Fixed Review Date:
Due Date: Set Due Date to XX days after Start Date
Due Date Offset: 0

General notes for the Prep for Appointment task.

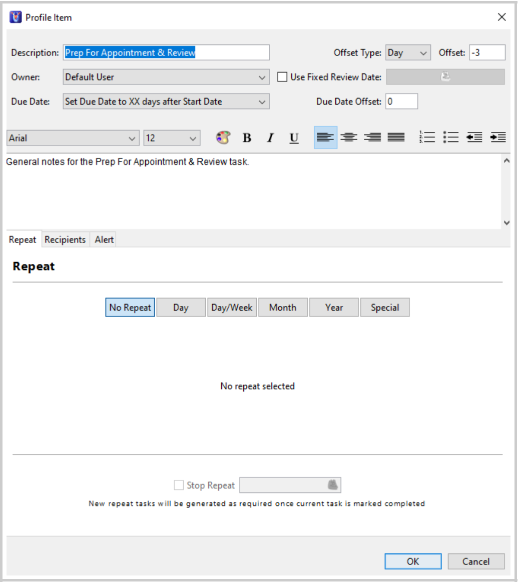
Repeat

No repeat selected

☐ Stop Repeat

New repeat tasks will be generated as required once current task is marked completed

Arial
12
Repeat
Recipients
Alert
No Repeat
Day
Day/Week
Month
Year
Special
OK
Cancel


Profile Item

Description: Prep For Appointment & Review
Offset Type: Day
Offset: -3
Owner: Default User
☐ Use Fixed Review Date:
Due Date: Set Due Date to XX days after Start Date
Due Date Offset: 0

General notes for the Prep For Appointment & Review task.

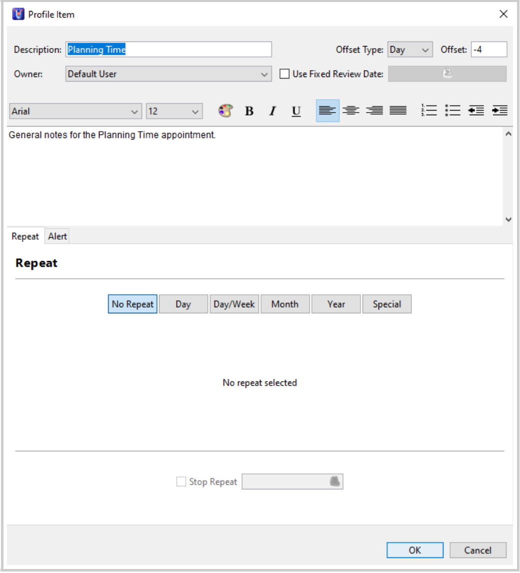
Repeat

No repeat selected

☐ Stop Repeat

New repeat tasks will be generated as required once current task is marked completed

Arial
12
Repeat
Recipients
Alert
No Repeat
Day
Day/Week
Month
Year
Special
OK
Cancel


Profile Item

Description: Planning Time
Offset Type: Day
Offset: -4
Owner: Default User
☐ Use Fixed Review Date:

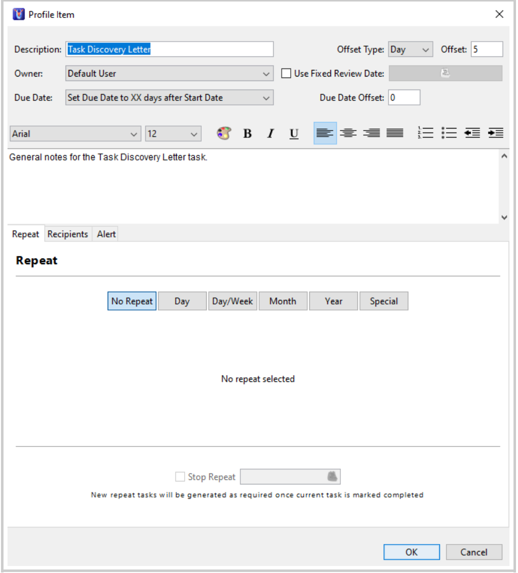
General notes for the Planning Time appointment.

Repeat

No repeat selected

☐ Stop Repeat

Arial
12
Repeat
Alert
No Repeat
Day
Day/Week
Month
Year
Special
OK
Cancel


Profile Item

Description: Task Discovery Letter
Offset Type: Day
Offset: 5
Owner: Default User
☐ Use Fixed Review Date:
Due Date: Set Due Date to XX days after Start Date
Due Date Offset: 0

General notes for the Task Discovery Letter task.

Repeat

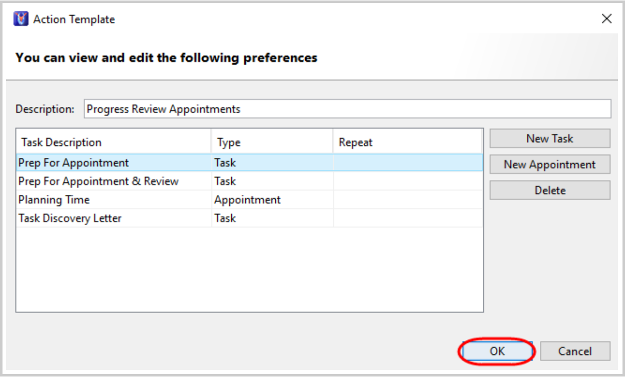
No repeat selected

☐ Stop Repeat

New repeat tasks will be generated as required once current task is marked completed

Arial
12
Repeat
Recipients
Alert
No Repeat
Day
Day/Week
Month
Year
Special
OK
Cancel

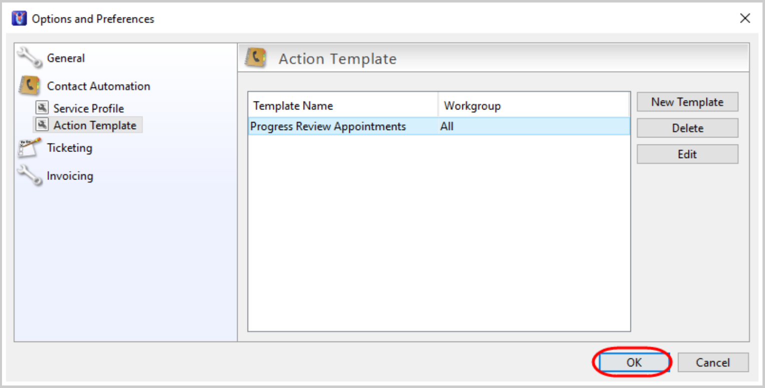
7. Once all tasks and/or appointments are entered click on **OK**.


Action Template
You can view and edit the following preferences
New Task
New Appointment
Delete
OK
Cancel

Description: Progress Review Appointments

Task Description	Type	Repeat
Prep For Appointment	Task	
Prep For Appointment & Review	Task	
Planning Time	Appointment	
Task Discovery Letter	Task	

8. Finally click **OK** to save your action template.

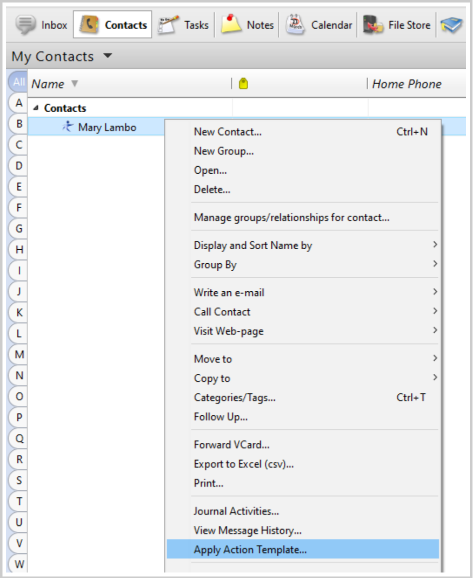

Options and Preferences
General
Contact Automation
Service Profile
Action Template
Ticketing
Invoicing
Action Template
New Template
Delete
Edit
OK
Cancel

Template Name	Workgroup
Progress Review Appointments	All

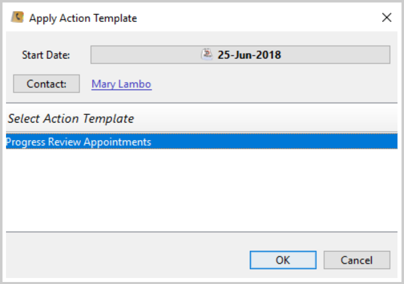
9. Login to UVC.

10. There are two different methods of applying an action template to any of your contacts:

Option 1
Find your contact.
Right click on the contact's name.
From the sub-menu select the option **Apply Action Template**.

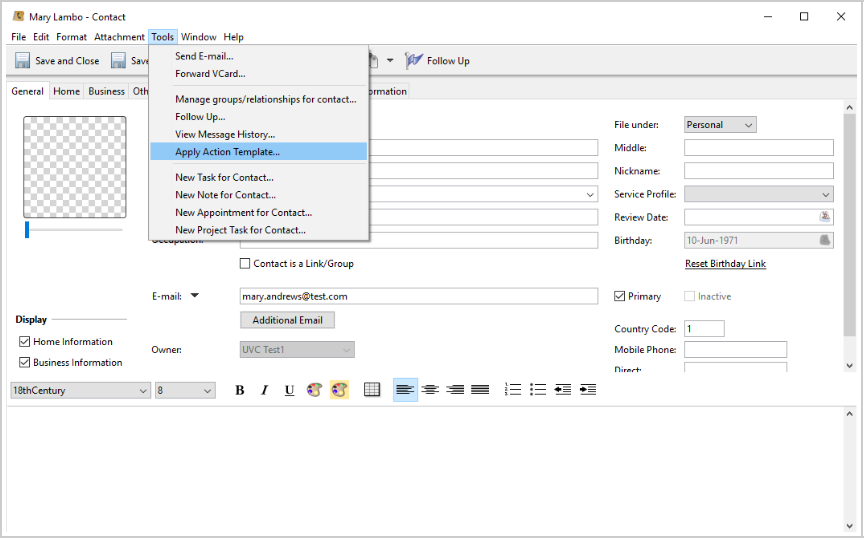

Inbox
Contacts
Tasks
Notes
Calendar
File Store
My Contacts
All
Name
Home Phone
A
B
C
D
E
F
G
H
I
J
K
L
M
N
O
P
Q
R
S
T
U
V
W
Contacts
Mary Lambo
New Contact... Ctrl+N
New Group...
Open...
Delete...
Manage groups/relationships for contact...
Display and Sort Name by
Group By
Write an e-mail
Call Contact
Visit Web-page
Move to
Copy to
Categories/Tags... Ctrl+T
Follow Up...
Forward VCard...
Export to Excel (csv)...
Print...
Journal Activities...
View Message History...
Apply Action Template...

Simply select the action template from the list and the **Start Date** which will be used to create the tasks/appointments. Click on **OK** to save.


Apply Action Template
Select Action Template
OK
Cancel

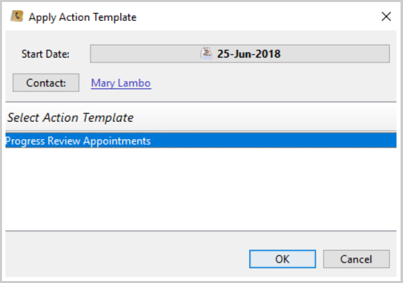
Start Date: 25-Jun-2018
Contact: Mary Lambo
Progress Review Appointments

Options 2
Find your contact.
Open the **Contact Detail** screen.
Click on **Tools -> Apply Action Template**.


Mary Lambo - Contact
File Edit Format Attachment Tools Window Help
Save and Close
Save
Follow Up
General Home Business Oth
Send E-mail...
Forward VCard...
Manage groups/relationships for contact...
Follow Up...
View Message History...
Apply Action Template...
New Task for Contact...
New Note for Contact...
New Appointment for Contact...
New Project Task for Contact...
Middle:
Nickname:
Service Profile:
Review Date:
Contact is a Link/Group
Reset Birthday Link
Additional Email
Inactive
Mobile Phone:
Display
Home Information
Business Information
18thCentury
8

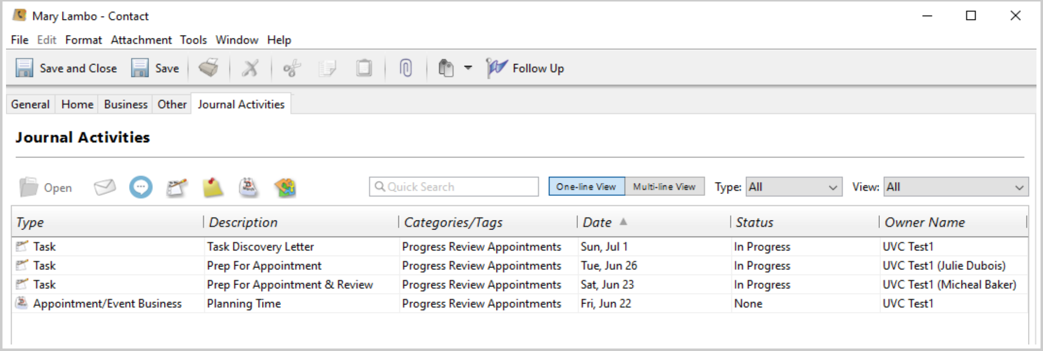
File under: Personal
Birthday: 10-Jun-1971
E-mail: mary.andrews@test.com
☑ Primary
Owner: UVC Test1
Country Code: 1
☑ Home Information
☑ Business Information

Simply select the action template from the list and the **Start Date** which will be used to create the tasks/appointments.
Click on **OK** to save.


Apply Action Template
OK
Cancel

Start Date: 25-Jun-2018
Contact: Mary Lambo
Select Action Template
Progress Review Appointments

11. Click on the **Journal Activity** to view the tasks/appointments created by the action profile you selected.


Mary Lambo - Contact
File Edit Format Attachment Tools Window Help
Save and Close
Save
Follow Up
General Home Business Other Journal Activities
Journal Activities
Open
Quick Search
One-line View
Multi-line View
Type: All
View: All

Type	Description	Categories/Tags	Date	Status	Owner Name
Task	Task Discovery Letter	Progress Review Appointments	Sun, Jul 1	In Progress	UVC Test1
Task	Prep For Appointment	Progress Review Appointments	Tue, Jun 26	In Progress	UVC Test1 (Julie Dubois)
Task	Prep For Appointment & Review	Progress Review Appointments	Sat, Jun 23	In Progress	UVC Test1 (Micheal Baker)
Appointment/Event Business	Planning Time	Progress Review Appointments	Fri, Jun 22	None	UVC Test1

Note: if necessary multiple action template can be assigned to a contact. UVC will create the appropriate tasks and/or appointments which were added to each of the action templates you will assign to the contact.