# Willeve Office Services

ian@willeveltd.co.uk www.willeveltd.co.uk

# SERVICE REMINDER SYSTEM DEMO

# USER GUIDE

# Willeve Office Services

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## Version Control

| | |
|---|---|
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## Contact details and help

| | |
|---|---|
| E-mail | ian@willeveltd.co.uk |
| Website | http://willeveltd.co.uk/ |
| Facebook | https://www.facebook.com/WilleveOfficeServices |
| Application demonstration video | **https://youtu.be/KVN265YBR_E**<br>(All menu options. Individual menu option videos can be viewed on the website) |

## Compatibility & system requirements

This application will function as intended on all 'Ribbon Versions' of the Microsoft Office suite, i.e. 2007 (version 12) onwards. Your operating system should be one of Windows 7, 8, 8.1 or 10. Excel, Word & Outlook will need to be installed on your computer in order to use this application.

## About this user guide

This user guide is specific to the demonstration application. A customised version will be supplied with your personalised Service Reminder System.

## About Service Reminder System

This application is to be used within Microsoft Excel and is designed to make the administration of your regular service contracts as efficient as possible. Your input is stripped back to the absolute minimum and all data is stored within the workbook which means issuing wake up emails/letters and reminding on them takes a matter of seconds.

This tool is designed to remove the hassle of reminding your customers to book your services. Feedback from tradesmen is that this is one of their most detested administration tasks. "If only there was some software that could deal with my annual service contracts", a gas engineer was heard to say. If you are creating and sending 50 letters or e-mails each month in order to create work for yourself then, if you are doing these manually, you are wasting a lot of time. Running this task on Willeve's Service Reminder System will take you no more than five minutes, if all reminders are sent by e-mail. Even if you post a proportion of 'wake up' letters, the documents are created, saved and ready to print at the end of the five minutes. Once your database is created the only maintenance required is to add new customers and log booked and completed services. This housekeeping is vital to the smooth operation of the system.

The application is centred on a database of your client details containing information relating to their service contract. Running the reminder functionality once a month will automatically select clients en masse with reference to the month in which their services are due and will create and save a 'wake up' letter, bespoke to that client, which will be automatically e-mailed (where an e-mail address is stored within the database). Where the client prefers to receive paper communication, the letters can be printed and posted.

This demo is based around the requirements of a boiler servicing engineer, but can be tailored to meet the requirements of any business or tradesman who serves their clients on a regular date related basis. Obvious other examples would include car services/MOT's, PAT testing, security system servicing etc.

The Service Reminder menu of the application has 8 functional options, all interlinked, and these will be covered in detail within is user guide.

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ian@willeveltd.co.uk    www.willeveltd.co.uk

## Instructions

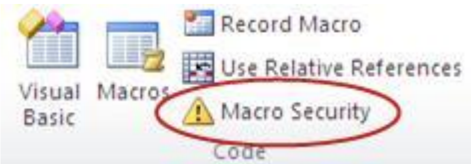
Please follow these instructions carefully in order to get the most out of the Service Reminder System application.

### *1. Opening and enabling the application*

This application is written in Microsoft Excel and uses Visual Basic for Applications (VBA) code to gather and produce the data used to create the quotation and to call the quotation template in Microsoft Word, which also uses VBA code in order to create the final document. Whilst this may not mean much to you, or even interest you, it is important that you have Microsoft Excel and Word set up in a way that allows the code (known as 'Macros') to run. You will also need Microsoft Outlook to be configured to use an active email account.

To check (and amend if necessary) your macro security settings (in both Excel & Word):

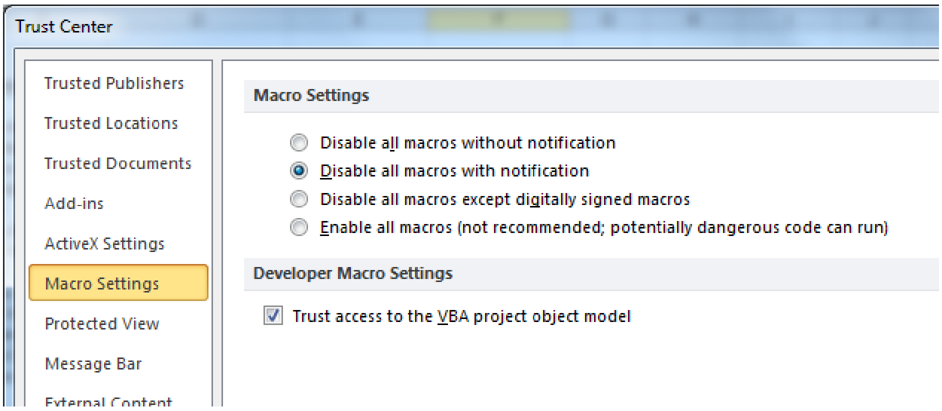
1. On the Developer tab, in the Code group, click Macro Security



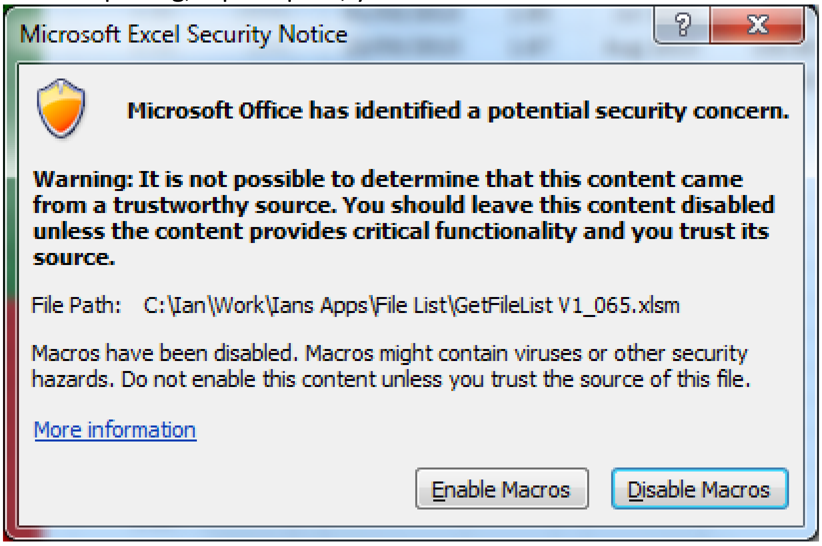

**Note:** If the Developer tab is not shown, display it on your ribbon by:

1. Click the File tab, click Options, and then click the Customize Ribbon category.
2. In the Main Tabs list (on the right of the displayed interface), select the Developer check box, and then click OK.

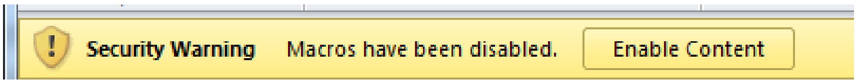
2. Ensure that your macro settings are as below (or to 'Enable all macros', though this isn't recommended). 'Disable with notification' means that Macros will be automatically disabled, but you will get a notification whenever you open a new Excel file that contains Macros, giving you the opportunity to enable or disable.



3. When opening, if prompted, you should 'Enable Macros'

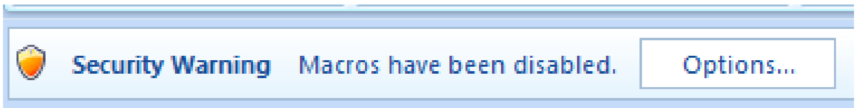



Or the security warning may display between the ribbon and the formula bar, depending on your settings:

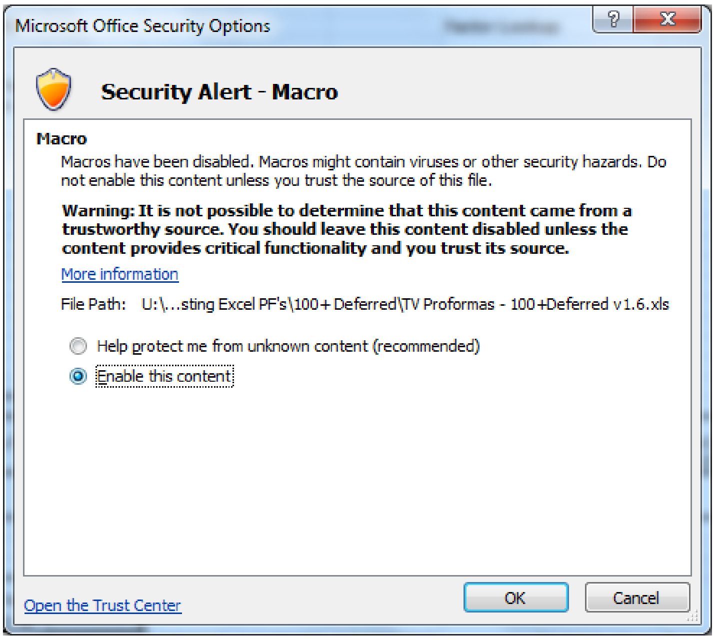



In which case, you should click 'enable content'.

In Excel 2007, you may be presented with this message



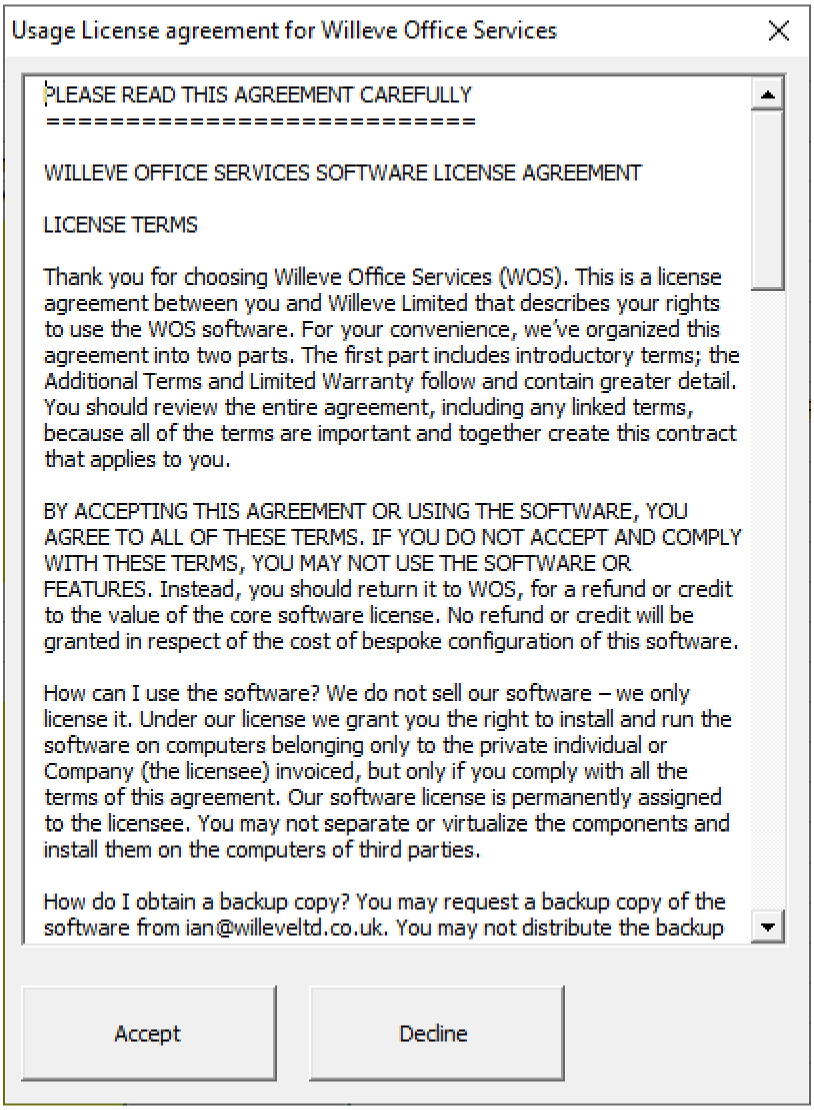

In which case, you should click options and select 'enable this content'.




You are now ready to set up your application.

## *2. Setting up the Service Reminder System*

The application will not be functional until you have read and accepted the license agreement. This will be displayed on opening the application, once the macros have been enabled, and will continue to be displayed on opening until 'accept' has been clicked. This can also be called from the menu.



Usage License agreement for Willeve Office Services

PLEASE READ THIS AGREEMENT CAREFULLY
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WILLEVE OFFICE SERVICES SOFTWARE LICENSE AGREEMENT

LICENSE TERMS

Thank you for choosing Willeve Office Services (WOS). This is a license agreement between you and Willeve Limited that describes your rights to use the WOS software. For your convenience, we've organized this agreement into two parts. The first part includes introductory terms; the Additional Terms and Limited Warranty follow and contain greater detail. You should review the entire agreement, including any linked terms, because all of the terms are important and together create this contract that applies to you.

BY ACCEPTING THIS AGREEMENT OR USING THE SOFTWARE, YOU AGREE TO ALL OF THESE TERMS. IF YOU DO NOT ACCEPT AND COMPLY WITH THESE TERMS, YOU MAY NOT USE THE SOFTWARE OR FEATURES. Instead, you should return it to WOS, for a refund or credit to the value of the core software license. No refund or credit will be granted in respect of the cost of bespoke configuration of this software.

How can I use the software? We do not sell our software – we only license it. Under our license we grant you the right to install and run the software on computers belonging only to the private individual or Company (the licensee) invoiced, but only if you comply with all the terms of this agreement. Our software license is permanently assigned to the licensee. You may not separate or virtualize the components and install them on the computers of third parties.

How do I obtain a backup copy? You may request a backup copy of the software from ian@willeveltd.co.uk. You may not distribute the backup

Accept Decline

To use the application, there are a few settings that need to be configured and at least four files and two sub directories are required. Don't worry, we will normally do all this for you before delivering the application, so this is really just for your information.

The settings can be found on the 'Settings' tab of the main file, highlighted in yellow, and the information should be input as follows:

1. **Directory:** This is the directory on your computer where the application and associated files are stored. It is populated automatically each time the application is opened
2. **Office:** This is the directory on your computer where the Microsoft Office program files are stored. It is populated automatically each time the application is opened
3. **VAT Rate:** Enter the current rate of VAT levied, with no % symbol. At the time of writing, the input here is '20'.
4. **Bulk Reminder Doc:** This is the name of the control document for your reminder letters.

5. **Data Source:** This is the name of your data source file.
6. **Number of wake ups to send:** How many times do you wish your bulk process to remind clients to book their service before ceasing correspondence?
7. **Days before reminding:** Minimum number of days that need to have passed since you last contacted a client before they are included in the bulk process.
8. **Email address to send from**: The e-mail address, configured in your copy of Microsoft Outlook, from which your reminders should be issued from.
9. **Discount round value:** This defines, in conjunction with the following setting, how you wish to round any discount applied to your clients (for example, a multi property discount. See below for more information on client discounts). 1 will round to the whole pound, 10 to the nearest 10 pounds etc.
10. **Round Up/down/nearest:** This defines, in conjunction with the previous setting, how you wish to round the discount to be applied. If round value is set as 5 and the exact discount is 32.80 then down will round to 30, up to 35, nearest to 35 and no rounding will retain 232.80.
11. **Service Level:** This is an area where you can set the cost your different levels of service and include extra services. Changes to these settings will often require changes to the code in the background to be made too, so please discuss with ian@willeveltd.co.uk before making amendments here.

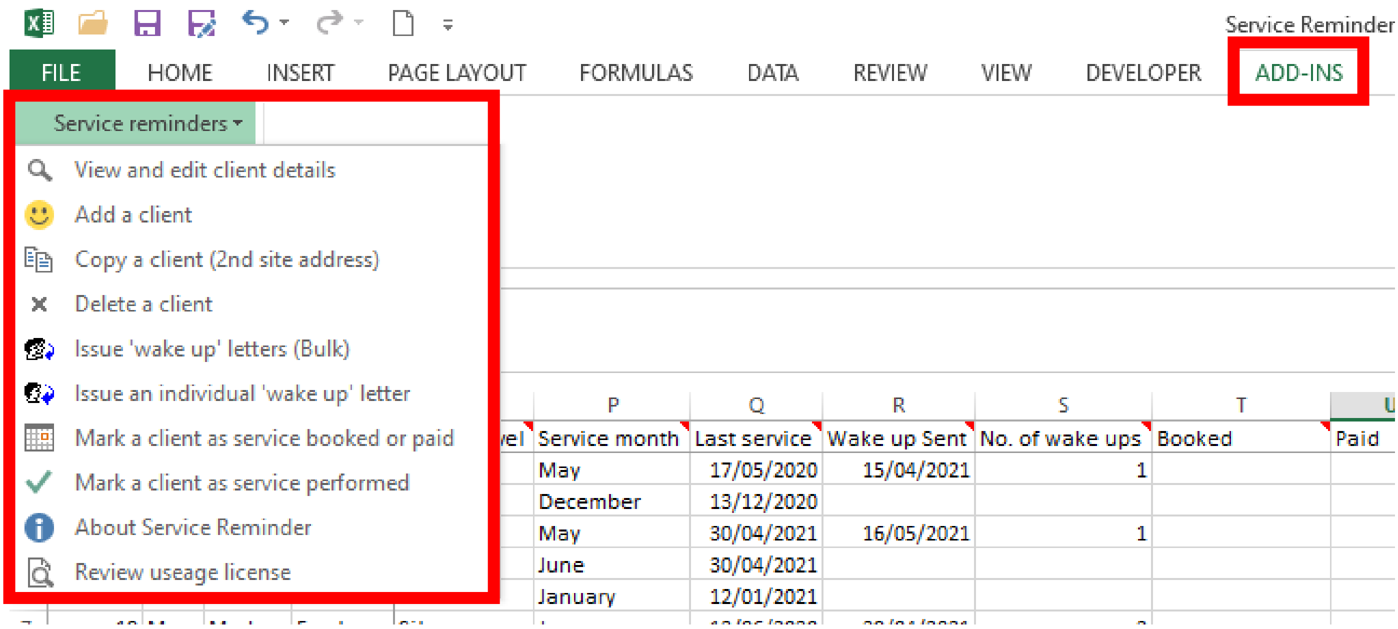
| | A | B |
|---|---|---|
| 1 | Directory | L:\Ian\Work\Office services\Demo applications\Reminder\ |
| 2 | Office | C:\Program Files\Microsoft Office 15\Root\Office15\ |
| 3 | VAT Rate | 20 |
| 4 | Bulk Reminder Doc | WakeUpControl.docm |
| 5 | Data Source | Service Source.xlsx |
| 6 | Number of wake ups to send | 2 |
| 7 | Days before reminding | 21 |
| 8 | Email address to send from | ian@willeveltd.co.uk |
| 9 | Discount round value | 1 |
| 10 | Round Up/down/nearest | Nearest |
| 11 | | |
| 12 | | |
| 13 | **Service Level** | **Cost** |
| 14 | Platinum | 250 |
| 15 | Gold | 200 |
| 16 | Silver | 150 |
| 17 | Landlords Certificate | 75 |
| 18 | | |
| 19 | | |
| 20 | | |
| 21 | | |
| 22 | | |
| 23 | | |
| 24 | | |
| 25 | | |
| 26 | | |

The files required are the main application, the data source, the control document and the template. These must all be stored in the same directory on your computer, with sub directories named ‘Letters’ & ‘PDFs’ being created too.

You are now ready to remove the hassle of reminding your clients to book their services.

## *3. Using the application*

To display the Service reminders menu, select the 'Add-Ins' tab and the menu will be displayed. Clicking the menu name will display the options available.




Each of the menu options is discussed in detail below.

- View and edit client details
- Add a client
- Copy a client (2nd site address)
- Delete a client
- Issue 'wake up' letters (Bulk)
- Issue an individual 'wake up' letter
- Mark a client as service booked or paid
- Mark a client as service performed
- About Service Reminder
- Review useage license

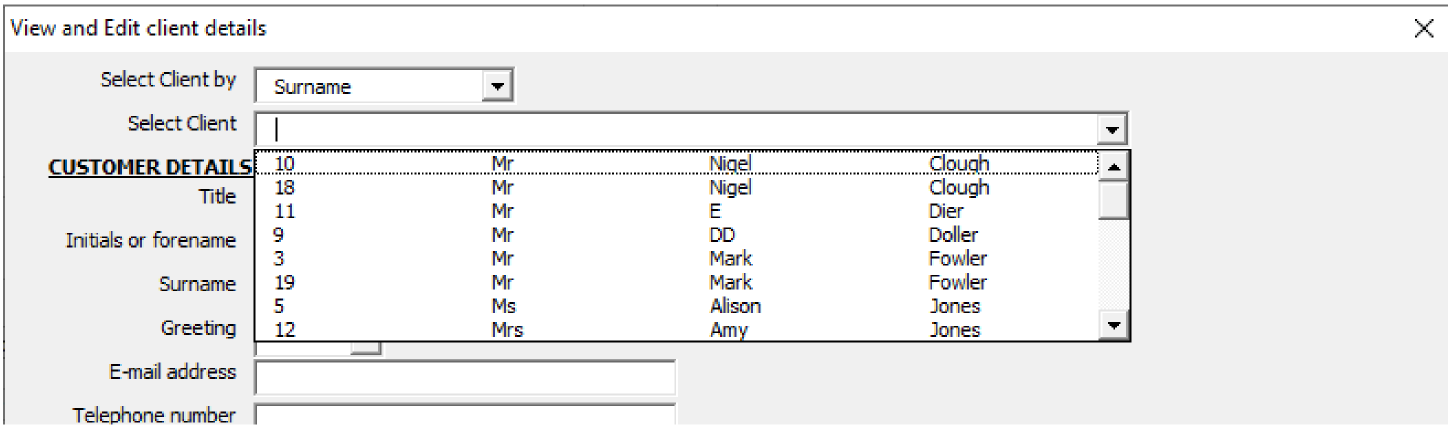
## a) View and edit client details

View a demonstration video here

The whole application revolves around your client database, which is why the client options appear at the top of the menu. Without the database, the application is of no use, so its creation and maintenance is crucial. If your client changes address (or e-mail address) and you don't maintain the database, then your reminders will go unseen. If you don't update your database when the service is booked and performed, then you risk annoying your clients by reminding them to do something that they have already done.

This menu option allows you to view and edit the details of clients on your database.


This will present you with the 'View and Edit client details' form. Firstly, we will look at the method of selecting an existing client.



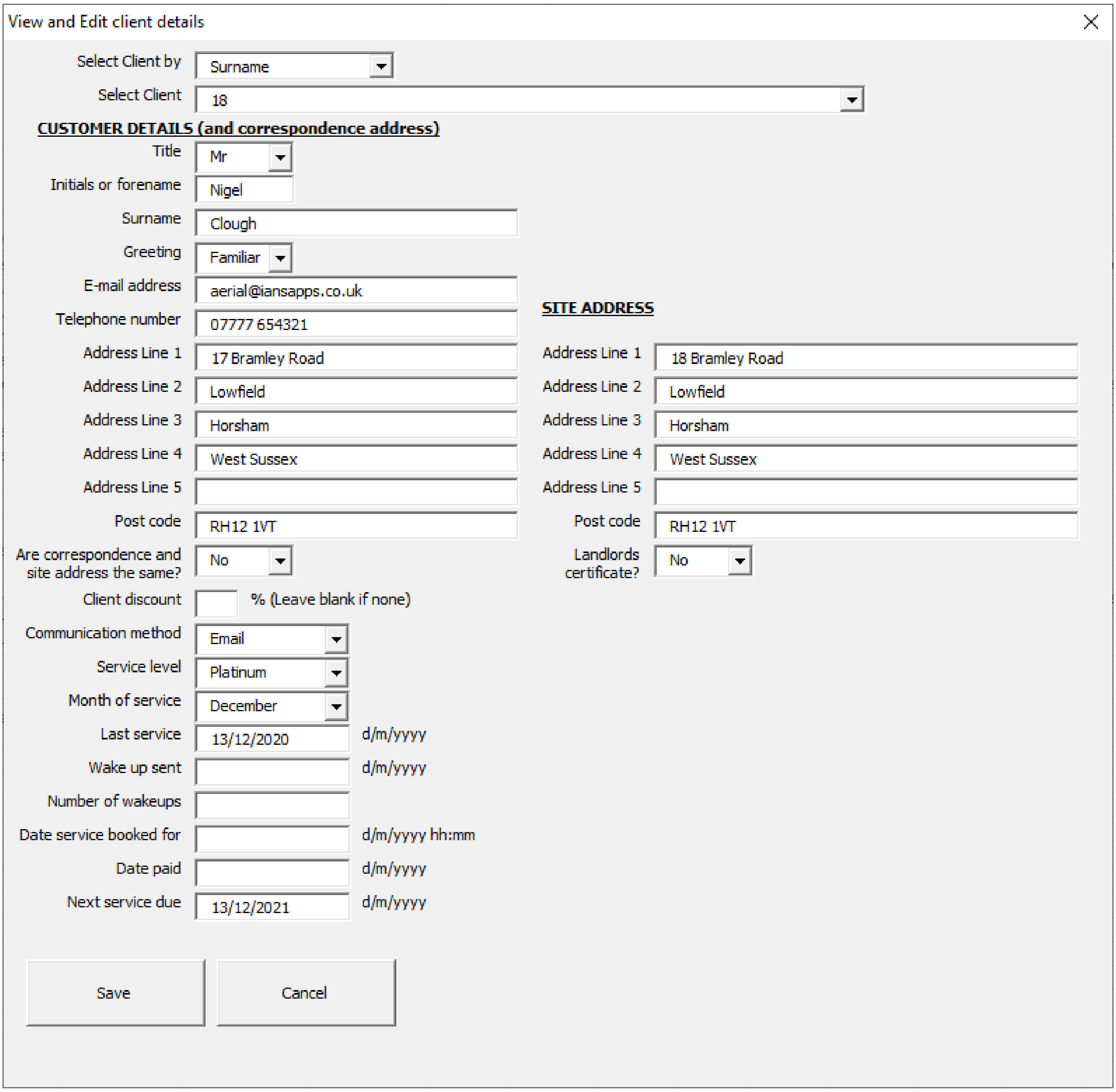

The first dropdown, 'Select Client by', will give you the option of ordering the 'Select Client' dropdown by either client reference number (the unique identifier in your database) or client surname. In the example above, you'll see that the clients are ordered by surname. The eagle eyed will notice that some clients appear twice, but with different reference numbers. This will be covered later in this document.

Once you have selected an existing client, the form will automatically complete itself with that clients details and all fields, bar the selection dropdowns, are editable. When you click 'Save' any changes you have made will be written back to your database and the form will close. Pressing 'Cancel' will close the form without saving your changes.

It is important that the data is input correctly and completely, so below the image of the form, we will discuss the inputs. When you click 'Save', your data is checked to ensure it is valid, but only insofar as ensuring you haven't input text into a numeric or date field and that your dates are valid. The data check won't know if you have mistyped an e-mail address or name, so please type carefully and visually check your inputs. The validation will highlight any errors that it finds and ask you to correct them before it saves.

Date inputs will be checked to ensure that they are valid dates. Dates should always be entered as numbers in the format d/m/yyyy. E.g. 2021 should be typed as 2021, not 21.

All examples in the input discussion will be based on the client shown in the form.


View and Edit client details

Select Client by: Surname

Select Client: 18

**CUSTOMER DETAILS (and correspondence address)**

| | |
|---|---|
| Title | Mr |
| Initials or forename | Nigel |
| Surname | Clough |
| Greeting | Familiar |
| E-mail address | aerial@iansapps.co.uk |
| Telephone number | 07777 654321 |
| Address Line 1 | 17 Bramley Road |
| Address Line 2 | Lowfield |
| Address Line 3 | Horsham |
| Address Line 4 | West Sussex |
| Address Line 5 | |
| Post code | RH12 1VT |
| Are correspondence and site address the same? | No |
| Client discount | % (Leave blank if none) |
| Communication method | Email |
| Service level | Platinum |
| Month of service | December |
| Last service | 13/12/2020 d/m/yyyy |
| Wake up sent | d/m/yyyy |
| Number of wakeups | |
| Date service booked for | d/m/yyyy hh:mm |
| Date paid | d/m/yyyy |
| Next service due | 13/12/2021 d/m/yyyy |

**SITE ADDRESS**

| | |
|---|---|
| Address Line 1 | 18 Bramley Road |
| Address Line 2 | Lowfield |
| Address Line 3 | Horsham |
| Address Line 4 | West Sussex |
| Address Line 5 | |
| Post code | RH12 1VT |
| Landlords certificate? | No |

Save Cancel

1. **Title:** Customers title. Select from the dropdown list.
2. **Initials or Forename:** If you wish to address the client formally on your correspondence, e.g. Dear Mr Clough, then enter the clients initial(s). If you wish to address them in a more familiar manner (e.g. Dear Nigel) then enter their forename.
3. **Surname:** Customers surname.
4. **Greeting:** Use the dropdown to select from Formal or Familiar, depending on how you wish to address your client. Please see item 2.
5. **E-mail address:** Customers e-mail address.
6. **Telephone number:** Customers telephone no.
7. **Address Lines & Postcode:** Customers correspondence address.

8. **Are correspondence and site address the same:** Many of your jobs will be located away from your customer's correspondence address. Select yes if the job is at the correspondence address, which will automatically populate the site address, or No if the site and correspondence address differ, which will then display fields into which you will be able input the site address. In the example above, we have selected No and hence the inputs discussed in 9, below, are visible.
9. **Site address lines and postcode:** This will only be displayed if you selected 'No' in field 8 and should be completed with the site address.
10. **Landlords certificate:** Select yes or no from the dropdown to record whether your client requires a Landlords Certificate to be issued when you perform the service, the price of which is defined on the settings tab (see section 2 above)
11. **Client Discount:** Some clients may enjoy a discount on their service when compared to your standard pricing if, for example, you service multiple properties for them (more on multiple properties later). If you do give a discount to this client, enter the percentage here. If you don't, then leave blank. If you are withdrawing a discount, be sure to clear the input.
12. **Communication method:** How will you communicate with this client? Select either E-Mail or Letter from the dropdown. If you select e-mail please ensure that the correct e-mail address has been entered in input 5.
13. **Service level:** In this example, Gas Service Limited offer three levels of service contract, the names and prices of which are defined on the settings tab (see section 2 above).
14. **Month of Service:** Which month of the year is the service due?

    **Each of the following values can be created by other process all of which, where referenced, will be discussed later in this document. You can, if you wish and where applicable, update the data here rather than going the bespoke process, though the menu options have been designed to be more efficient than manually updating here as they often update more than just the one field. For example, marking a service as complete will, besides updating the 'last service' field, also clear the 'Booked' and 'paid' fields, ready for next year, and update the 'next service due' field with the 1st of the service month in the following year, ready to be picked up by the bulk process.**

15. **Last service:** This will show the date that the last service was performed. When adding a new client (see below) this will need to be added manually, but future updates will be done automatically when you mark the service as having been performed, using that menu option.
16. **Wake up sent:** This will be automatically populated within your database when the client is picked up by the Bulk 'Issue Wake ups' process or by the single client remainder process.
17. **Number of wakeups:** This records how many reminders have been sent. When the count reaches the value input in the settings tab (see section 2 above), the client will no longer be included in the bulk wake up process.
18. **Date service booked for:** When a client books their service this should be populated, either using the dedicated process or through this form, to ensure that they are not reminded to do something they have already done if the next bulk run is performed before the service, which is quite likely if you are booking 2 or 3 months in advance.
19. **Date Paid:** Update using the dedicated process when your client has paid to enable you to keep track.
20. **Next service due:** When you first add the client, populate this field with the date that you will be doing the first service (though it doesn't matter if it's left blank as the functionality works from item 14, above). This field will subsequently auto populate once the service is marked as complete.

When you are happy with your changes, click 'Save'

## b) Add a Client

View a demonstration video here

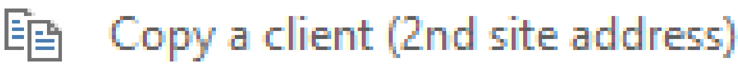
To add a new client from scratch, click 'Add a client':


This will present you with the same form as before, but the existing client selection dropdowns will not be functional. You should use the form to add a new client, completing the fields in the manner described in section 3a.

## c) Copy a client (2nd site address)

View a demonstration video here

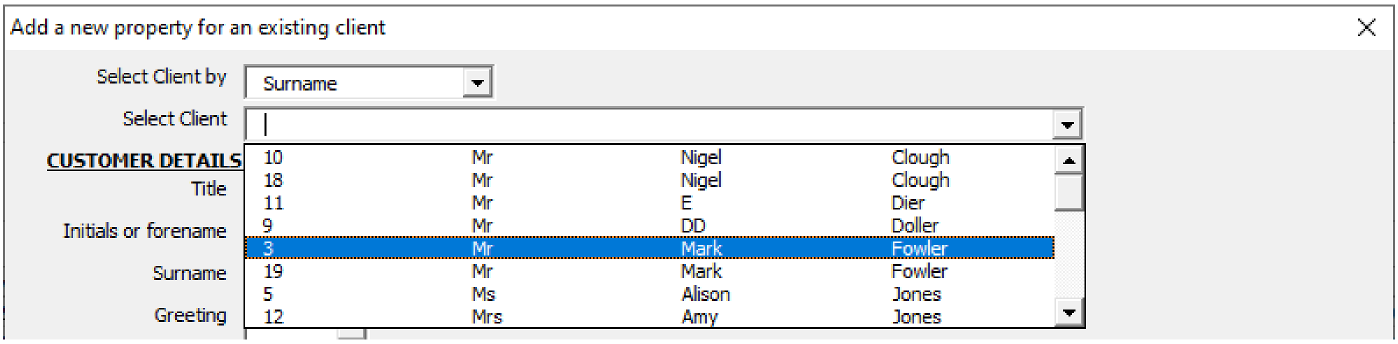
This was briefly touched upon in section 3a, when we mentioned client discounts for multiple properties in field 11. You should use this option if an existing client is adding an additional property to your service portfolio. This option means you can add a new property for your client without having to complete all of the client details.




This will again display the same form discussed in sections 3a and 3b and you should use the same method as previously described to select your client.

Once you have selected the client to copy, the form will populate with the clients details and automatically set the 'Are correspondence and site address the same' indicator to no and display blank 'site address' fields. Simply complete the site address and as necessary and click save.

When an additional site address is added for a client, that address is allocated its own client reference number and so appears as an entry in its own right on your database. However, the client reference of the parent record (i.e. the record you choose to duplicate) is stored on the new record in column AM, so I would recommend selecting the client's first record each time you create a duplicate. In the screenshot below and using 'Mr Mark Fowler' as an example, record 3 is the original record and record 19 is a duplicate record for an additional property. I would recommend selecting record 3 every time you add a property for this client. In this demo version, the parent record number drives nothing and is for information only, but you may have some bespoke requirements that necessitate grouping properties of a single client which will mean consistency of data recording is vital.



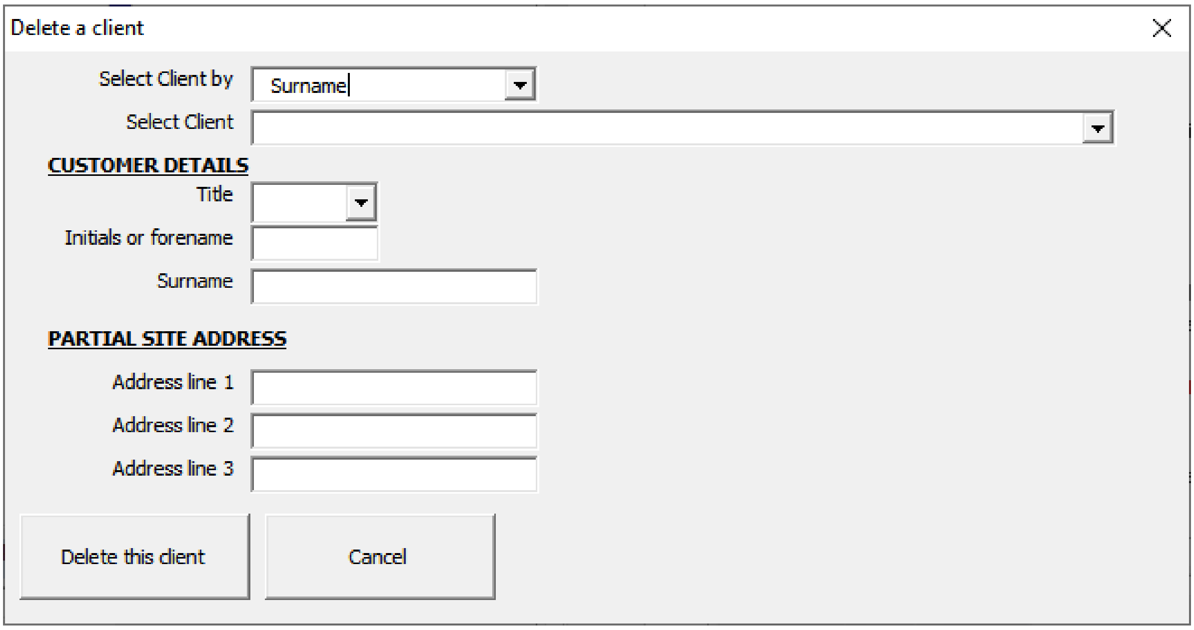
## d) Delete a client

View a demonstration video here

Unfortunately, and for a variety of reasons, you will lose clients over time and you'll want to delete these from your database to avoid issuing reminders.

Delete a client

On clicking the menu option you will be presented with the 'Delete a client' form. Simply select the client to remove, in line with the method previously discussed, check the customer details are as you wish and click 'Delete this client' and the record will be permanently removed from your database.



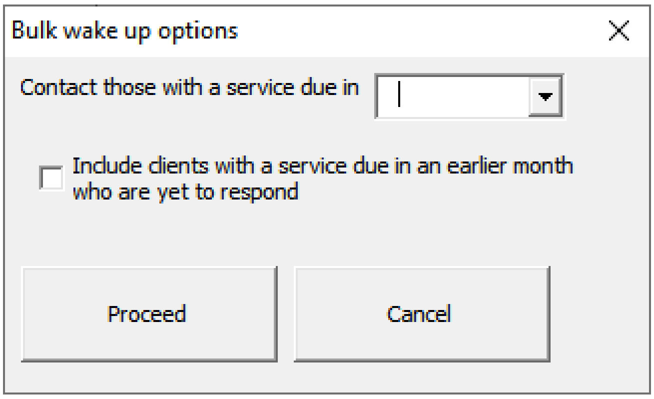

## e) Issue 'wake up' letters (Bulk)

View a demonstration video here

This function is, of course, the main purpose of the software. Once your data has been entered (and maintained!) you will be using this option to create and issue your monthly reminders in 2 or 3 minutes rather than spending hours doing the job manually.

Issue 'wake up' letters (Bulk)

Despite being the main feature of the software, the process is very simple, just as long as your data is maintained – a point that will continue to be emphasised. It is vital for the functionality of the software that your database is updated with booked and completed services prior to performing your monthly reminder run.




Use the dropdown to select the month in which services are due that you wish to wake your clients up for and decide whether to include clients from earlier months who are yet to respond (subject to them not having already been reminded the number of times that you have specified in the settings, as discussed in part 6 of 'Setting up the Service Reminder System') and click proceed.

The software will produce a letter for each service due in the month you have selected (in both Word and PDF format) and, where e-mail is defined as the communication method in your database, will email the letter to your client as an attachment. The Word version of the letters will be left open on your desktop, for you to print, review or close as necessary, and both versions will be automatically saved in the 'letters' and PDFs' directories of the application for future reference.

Within your database, the 'Wake up sent' column (R) will be updated with the date that the letters were created and the 'No. of wake ups sent' column (S) will be incremented to reflect how many reminders have been issued.

## f) Issue an individual 'wake up' letter

View a demonstration video here

This function is similar to the bulk process discussed above, but enables you to select and individual client (using the method previously discussed) and issue a wake up just to them. Letter production and e-mailing and database updates function in exactly the same way as for the bulk process.

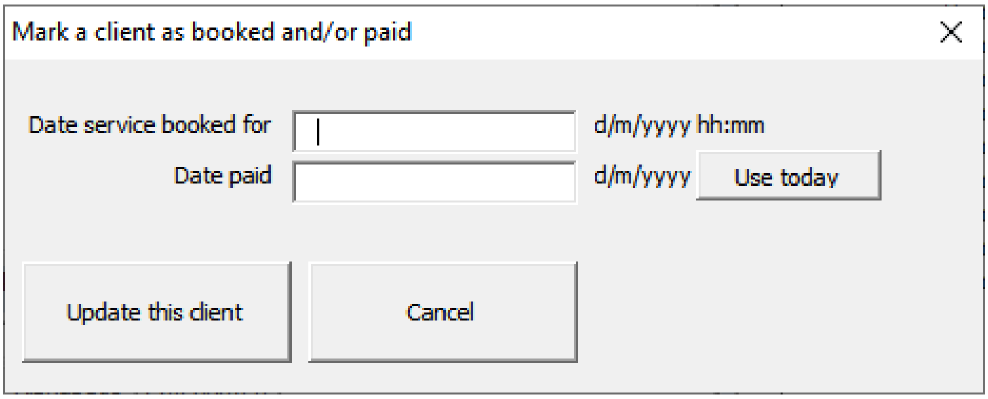

Having selected the client you will be shown some information about this contract and asked to confirm your request.

## g) Mark a client as service booked or paid

View a demonstration video here

Having issued reminders to your clients to arrange their service, you will now be booking in those services. It is important that you update your database when these bookings are made to avoid issuing further reminders to clients who have already contacted you. Re-issuing reminders in this circumstance is a sure fire way to irritate your customers. This option is also used to update the client record to show that they have paid.


Having selected the client (using the method previously discussed), you will be presented with the input shown below. Please enter the details in the format shown to the right of each input box. For the date paid option, you can simply click the 'use today' button.



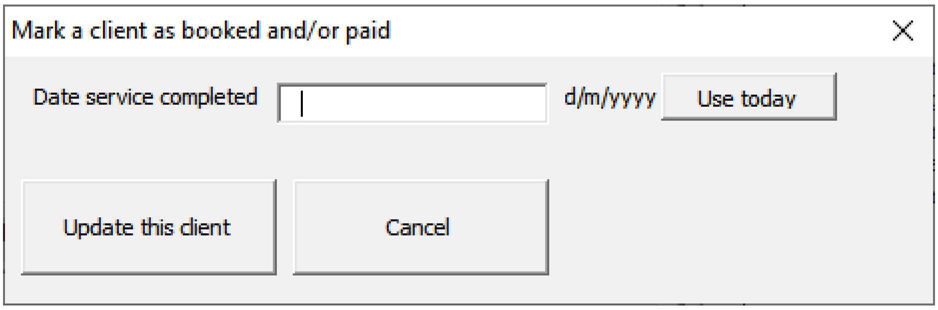

On clicking proceed, the 'Booked' column (T) and 'Paid' column (U) will be updated with your inputs. The columns containing 'Last service' (Q), 'Wake up Sent' (R), 'No. of wake ups' (S) and 'Next Service due' (V) will be cleared in preparation for future use.

## h) Mark a client as service performed

View a demonstration video here

Once the service has been performed, you should select this option to set the database ready for next years reminder.


Having selected the client (using the method previously discussed), you will be presented with the input shown below. Please enter the details in the format shown to the right of the input box or click the 'use today' button if that is relevant.




On clicking proceed, the 'Last Service' column (Q) will be updated with your input. The columns containing 'Booked' (T), 'Paid' (U) will be cleared and the 'Next Service due' column (V) will be updated in preparation for future use.

### i) About and review license

These have no functionality and merely provide application information and an opportunity to review your usage license.

## Other possibilities and future additions

### *1. Whatever you want*

We have included the basics in this software, but we are not gas service engineers so need you to tell us, what do YOU want? This application is designed to liberate you from paperwork, not to enslave you, so tell us your requirements and we'll tell you, firstly, if we can do it (the likelihood is that we can!) and, most importantly, whether it will be cost effective for us to do so.

If you have been using the system for a while and find yourself wondering why it doesn't do something that would be particularly useful for YOU, then please contact us to discuss your requirements.

For full details of how the demo application has been configured (and how it *could* be configured) and to understand the possibilities available so that the Service Reminder system can work for *YOU*, please visit http://willeveltd.co.uk/examples.html