

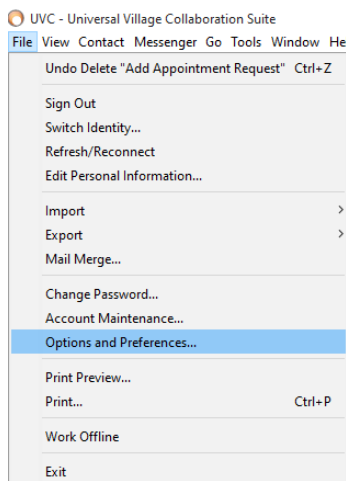


How to create the Misc. Contact Information custom tab template

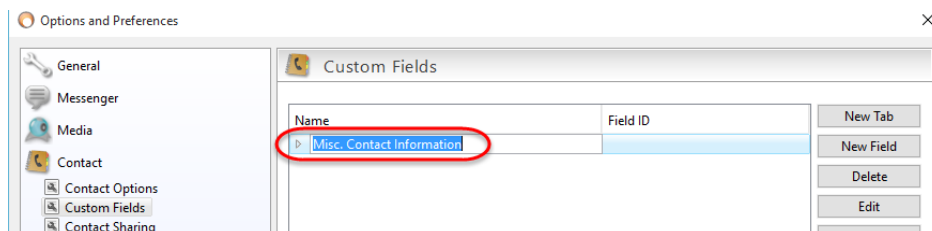
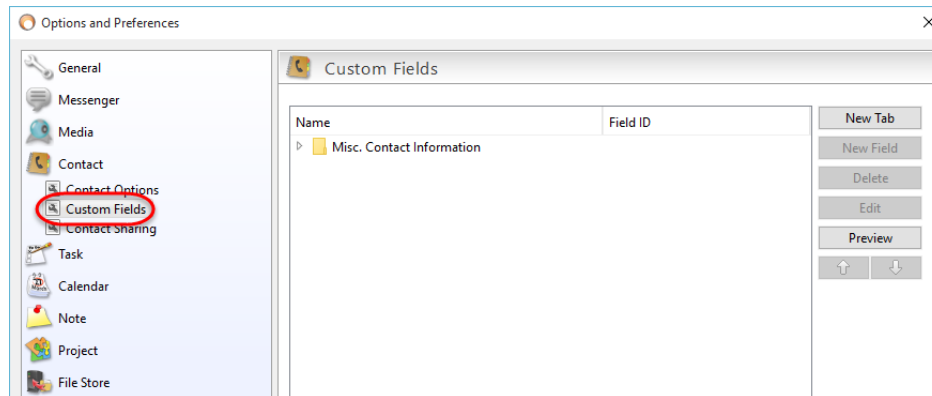
In the **example** below we will explain how to create the **Misc. Contact Information** custom tab template. The following template contains the most common elements based on what we have seen financial advisors implement. Understanding how to create this template can let you explore one of the best features in UVC and let you create your own custom tabs/fields to gather your own information.

Please note that the tabs/fields you create under your own contact list will be seen by the other users that you are currently sharing your list with. These custom tabs/fields are **user defined** and can only be seen within your contact list. If a different user wants to see the same tabs/fields for contacts on their own list, that user will need to create those tabs/fields using their own UVC account.

1. Click on **File and Options and Preferences.**



2. Click on Contacts and then click on the **New Tab** button to create a new tab. The name of the new tab will be *Misc. Contact Information*



Click on the **Enter** key on your keyboard to save your new tab.

- Now you are ready to add new fields within that tab.
Click on the **New Field** button to create a new field within the selected tab you just created in step#2.

The **Description** of your first new field will be *Language*.
The **Type** will be an *Editable DropDown*.

You will notice that the bottom part where the header Name is shown will be available to edit.
Click on the **+ symbol** to add a new options to your drop down menu.

The options you will add are:

English

French

Spanish

Other (please specify)

New Custom Field

Description: Language

Type: Editable DropDown

Field Width: [Slider]

Layout Field in Next Column

Do not include field on printouts

Name: Language

English

French

Spanish

Other (please specify)

Field ID: 72914-1

OK Cancel

Click on the **OK** button to save your new field.

- Click on the **New Field** button again to add your second field.
The **Description** will be *SIN*.
The **Type** will be a *NumberField*.

New Custom Field

Description: SIN

Type: NumberField

Field Width: [Slider]

Layout Field in Next Column

Do not include field on printouts

Field ID: 72914-2

OK Cancel

Click on the **OK** button to save your field.

- Click on the **New Field** button to add your next field.
The **Description** will be *Number of Dependants*.
The **Type** will be *CheckBox Options*.

Click on the **+ symbol** to add the number of dependants you want. In this template 6 will be created.
Add the following numbers:
0, 1, 2, 3, 4, 5 and 6

New Custom Field

Description: Number of Dependants

Type: CheckBox Options

Field Width: [Slider]

Layout Field in Next Column

Do not include field on printouts

Name: 0, 1, 2, 3

Field ID: 72914-4

OK Cancel

Click on the **OK** button to save your field.

- Your dependants *Name* and *DOB* fields will need to be created in the order seen below. We will explain how to create and align the dependants 1, 2 and 3. For the dependants 4, 5 and 6 the same procedure will have to be applied.

Options and Preferences

Custom Fields

Name	Field ID
Misc. Contact Information	
Language	72914-1
SIN	72914-2
Number of dependants	72914-4
Dependant #1 Name	72914-5
Dependant #2 Name	72914-7
Dependant #3 Name	72914-9
Dependant #1 DOB	72914-6
Dependant #2 DOB	72914-8
Dependant #3 DOB	72914-10
Dependant #4 Name	72914-13
Dependant #5 Name	72914-11
Dependant #6 Name	72914-15
Dependant #4 DOB	72914-14
Dependant #5 DOB	72914-12
Dependant #6 DOB	72914-16

New Tab

New Field

Delete

Edit

Preview

↑ ↓

Click on the **New Field** button to add your first dependant name field.
The **Description** will be *Dependant #1 Name*.
The **Type** will be *TextField*.

New Custom Field

Description: Dependant #1 Name

Type: TextField

Field Width: [Slider]

Layout Field in Next Column

Do not include field on printouts

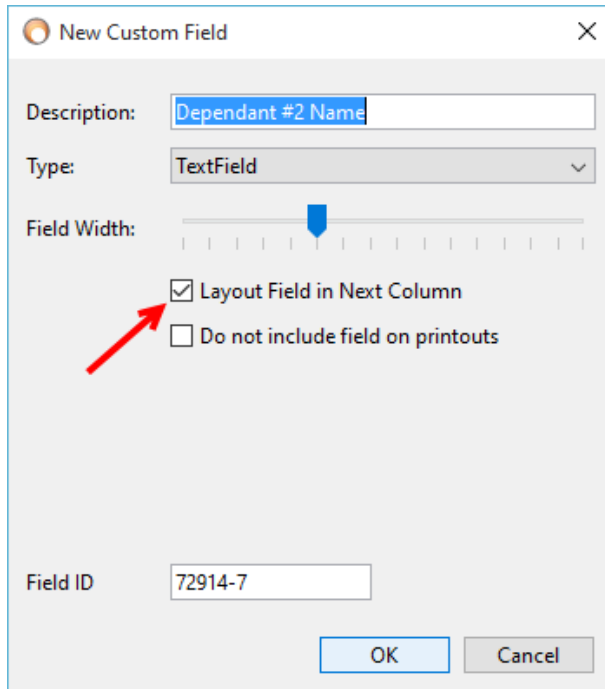
Field ID: 72914-5

OK Cancel

Click on the **OK** button to save your field.

- Click on the **New Field** button to add your second dependant name field.
The **Description** will be *Dependant #2 Name*.
The **Type** will be *TextField*.

Select the option **Layout Filed in Next Column**. This option will move the field *Dependant #2 Name* to the right of *Dependant #1 Name*.

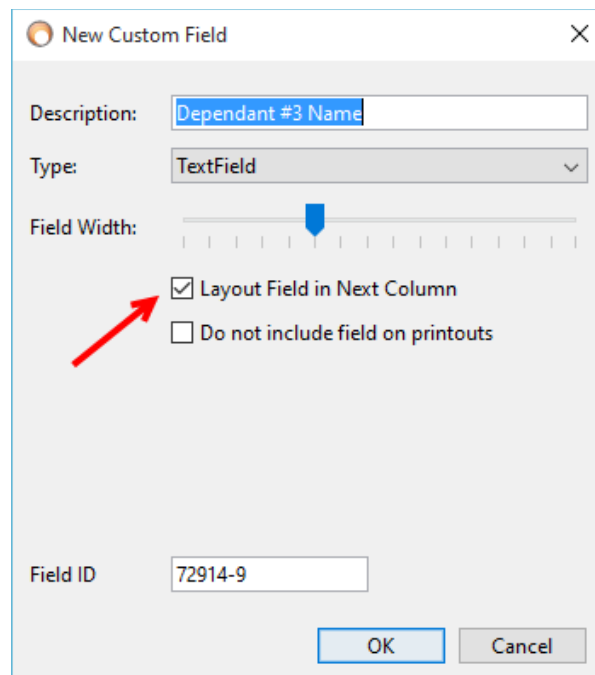


The screenshot shows a dialog box titled "New Custom Field". It has a close button (X) in the top right corner. The "Description:" field contains the text "Dependant #2 Name". The "Type:" dropdown menu is set to "TextField". Below that is a "Field Width:" slider. There are two checkboxes: "Layout Field in Next Column" which is checked and has a red arrow pointing to it, and "Do not include field on printouts" which is unchecked. At the bottom, there is a "Field ID" field containing "72914-7" and two buttons: "OK" and "Cancel".

Click on the **OK** button to save your field.

- Click on the **New Field** button to add your third dependant name field.
The **Description** will be *Dependant #3 Name*.
The **Type** will be *TextField*.

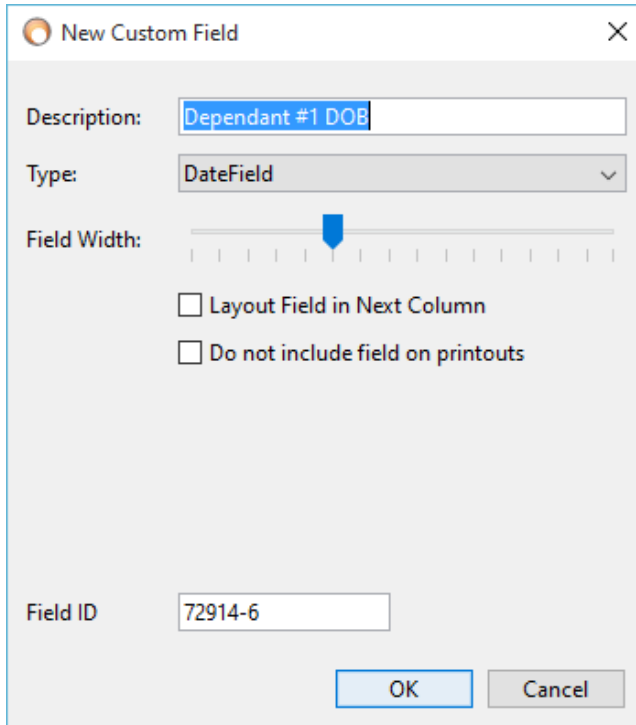
Select the option **Layout Filed in Next Column**. This option will move the field *Dependant #3 Name* to the right of *Dependant #2 Name*.



The screenshot shows a dialog box titled "New Custom Field". It has a close button (X) in the top right corner. The "Description:" field contains the text "Dependant #3 Name". The "Type:" dropdown menu is set to "TextField". Below that is a "Field Width:" slider. There are two checkboxes: "Layout Field in Next Column" which is checked and has a red arrow pointing to it, and "Do not include field on printouts" which is unchecked. At the bottom, there is a "Field ID" field containing "72914-9" and two buttons: "OK" and "Cancel".

Click on the **OK** button to save your field.

- Click on the **New Field** button to add your first dependant date of birth field.
The **Description** will be *Dependant #1 DOB*.
The **Type** will be *DateField*.

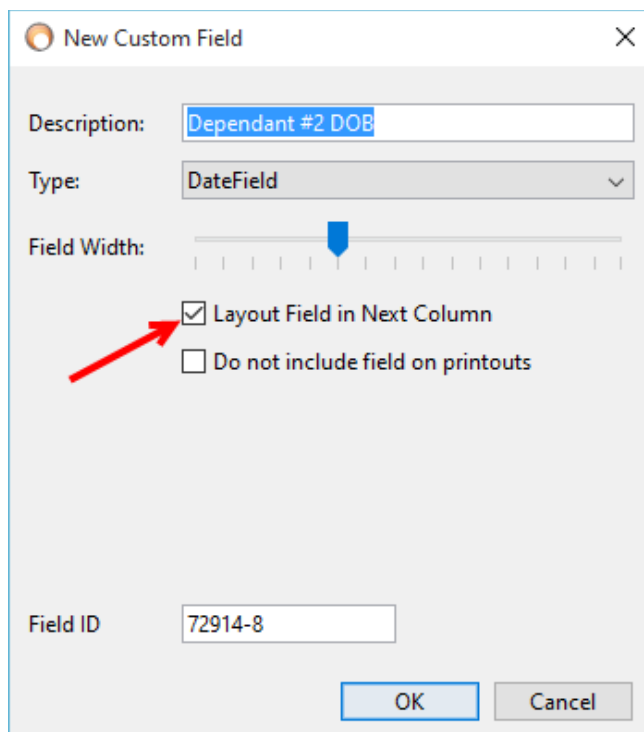


The screenshot shows a dialog box titled "New Custom Field" with a close button (X) in the top right corner. The "Description:" field contains the text "Dependant #1 DOB". The "Type:" dropdown menu is set to "DateField". Below this is a "Field Width:" slider with a blue handle positioned in the middle. There are two checkboxes: "Layout Field in Next Column" (unchecked) and "Do not include field on printouts" (unchecked). At the bottom, the "Field ID" field contains "72914-6". There are "OK" and "Cancel" buttons at the bottom right.

Click on the **OK** button to save your field.

- Click on the **New Field** button to add your second dependant date of birth field.
The **Description** will be *Dependant #2 DOB*.
The **Type** will be *DateField*.

Select the option **Layout Filed in Next Column**. This option will move the field *Dependant #2 DOB* to the right of *Dependant #1 DOB*.



The screenshot shows a dialog box titled "New Custom Field" with a close button (X) in the top right corner. The "Description:" field contains the text "Dependant #2 DOB". The "Type:" dropdown menu is set to "DateField". Below this is a "Field Width:" slider with a blue handle positioned in the middle. There are two checkboxes: "Layout Field in Next Column" (checked) and "Do not include field on printouts" (unchecked). A red arrow points to the checked checkbox. At the bottom, the "Field ID" field contains "72914-8". There are "OK" and "Cancel" buttons at the bottom right.

Click on the **OK** button to save your field.

11. Click on the **New Field** button to add your third dependant date of birth field. The **Description** will be *Dependant #3 DOB*. The **Type** will be *DateField*.

Select the option **Layout Filed in Next Column**. This option will move the field *Dependant #3 DOB* to the right of *Dependant #2 DOB*.

New Custom Field

Description:

Type:

Field Width:

Layout Field in Next Column

Do not include field on printouts

Field ID

Click on the **OK** button to save your field.

12. As mentioned earlier, steps #6 through #11 will need to be repeated to add your 4th, 5th and 6th dependants name and DOB fields (same exact way but in the order of 4, 5 and 6 as seen below). When you click on the **Preview** button (which allows you to preview the layout and progress of your template) your template should look as seen below:

Options and Preferences

Custom Fields

Name	Field ID
Misc. Contact Information	
Language	72914-1
SIN	72914-2
Number of dependants	72914-4
Dependant #1 Name	72914-5
Dependant #2 Name	72914-7
Dependant #3 Name	72914-9
Dependant #1 DOB	72914-6
Dependant #2 DOB	72914-8
Dependant #3 DOB	72914-10
Dependant #4 Name	72914-13
Dependant #5 Name	72914-11
Dependant #6 Name	72914-15
Dependant #4 DOB	72914-14
Dependant #5 DOB	72914-12
Dependant #6 DOB	72914-16

Preview

Misc. Contact Information

Misc. Contact Information

Language:

SIN:

Number of dependants

0 1 2 3 4 5 6

Dependant #1 Name: Dependant #2 Name: Dependant #3 Name:

Dependant #1 DOB: Dependant #2 DOB: Dependant #3 DOB:

Dependant #4 Name: Dependant #5 Name: Dependant #6 Name:

Dependant #4 DOB: Dependant #5 DOB: Dependant #6 DOB:

13. Once you have created all your dependants fields you are now ready to add the spousal information.

Click on the **New Field** button to add a new field.

The **Description** will be *Marital Status*.

The **Type** will be *RadioButton Options*.

Again you will notice that the bottom part where the header Name is shown will be available to edit.

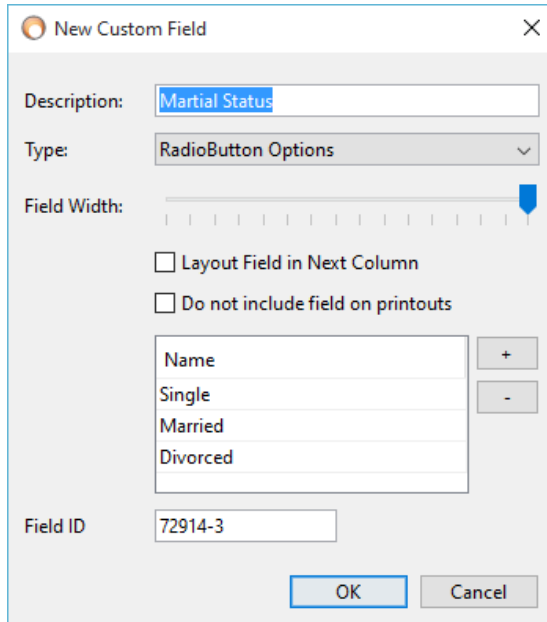
Click on the **+ symbol** to add a new choice to your radio button choices.

The options you will add are:

Single

Married

Divorced



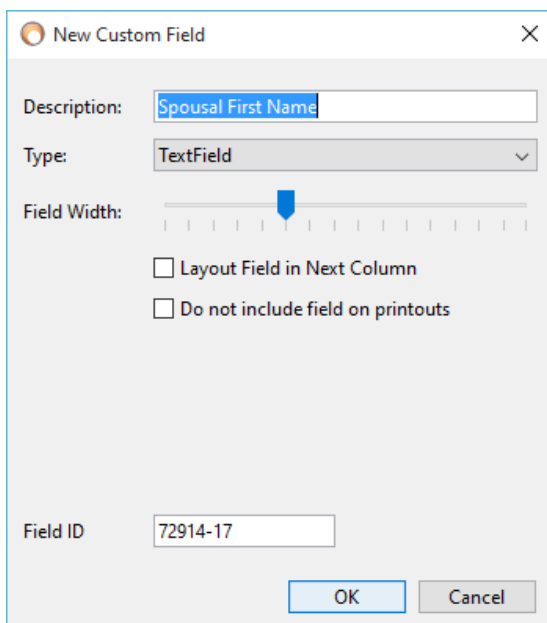
The screenshot shows a dialog box titled "New Custom Field". The "Description" field contains "Marital Status". The "Type" dropdown is set to "RadioButton Options". The "Field Width" is represented by a slider. There are two unchecked checkboxes: "Layout Field in Next Column" and "Do not include field on printouts". A list box shows the options "Single", "Married", and "Divorced", with a "+" button to the right. The "Field ID" is "72914-3". "OK" and "Cancel" buttons are at the bottom.

Click on the **OK** button to save your field.

14. Click on the **New Field** button to add a new field.

The **Description** will be *Spousal First Name*.

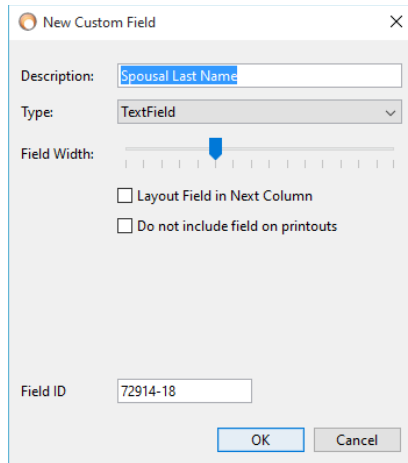
The **Type** will be *TextField*.



The screenshot shows a dialog box titled "New Custom Field". The "Description" field contains "Spousal First Name". The "Type" dropdown is set to "TextField". The "Field Width" is represented by a slider. There are two unchecked checkboxes: "Layout Field in Next Column" and "Do not include field on printouts". The "Field ID" is "72914-17". "OK" and "Cancel" buttons are at the bottom.

Click on the **OK** button to save your field.

15. Click on the **New Field** button to add a new field.
The **Description** will be *Spousal Last Name*.
The **Type** will be *TextField*.

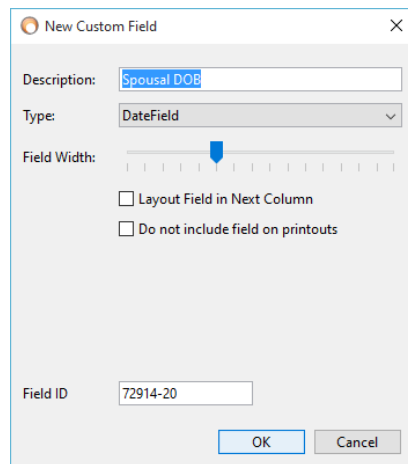


The screenshot shows a dialog box titled "New Custom Field" with a close button (X) in the top right corner. It contains the following fields and options:

- Description:
- Type:
- Field Width: A horizontal slider bar with a blue arrowhead pointing to the right.
- Layout Field in Next Column
- Do not include field on printouts
- Field ID:
- Buttons: and

Click on the **OK** button to save your field.

16. Click on the **New Field** button to add a new field.
The **Description** will be *Spousal DOB*.
The **Type** will be *DateField*.

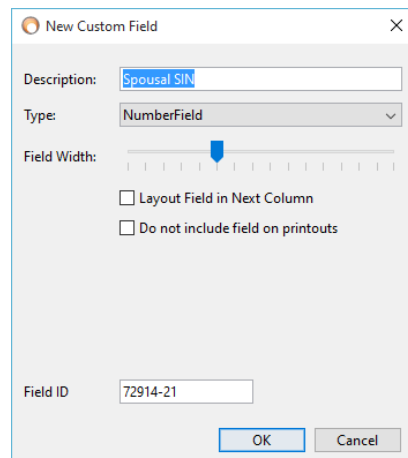


The screenshot shows a dialog box titled "New Custom Field" with a close button (X) in the top right corner. It contains the following fields and options:

- Description:
- Type:
- Field Width: A horizontal slider bar with a blue arrowhead pointing to the right.
- Layout Field in Next Column
- Do not include field on printouts
- Field ID:
- Buttons: and

Click on the **OK** button to save your field.

17. Click on the **New Field** button to add a new field.
The **Description** will be *Spousal SIN*.
The **Type** will be *NumberField*.

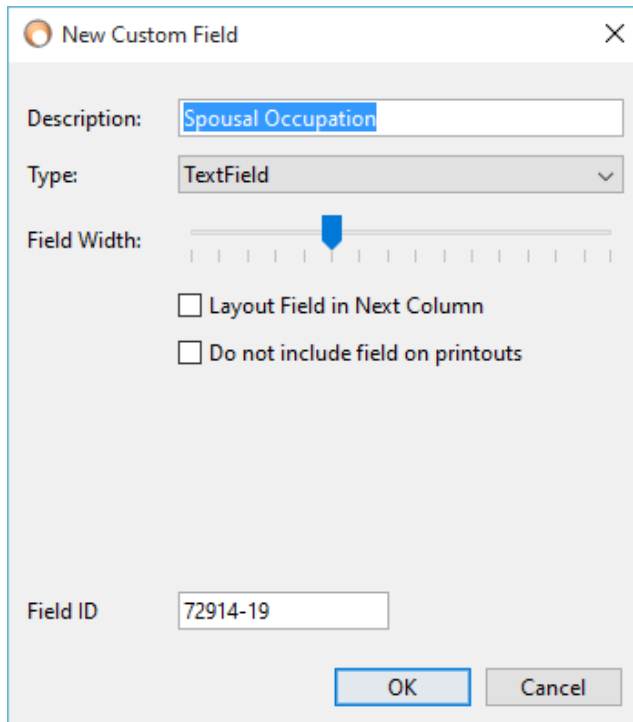


The screenshot shows a dialog box titled "New Custom Field" with a close button (X) in the top right corner. It contains the following fields and options:

- Description:
- Type:
- Field Width: A horizontal slider bar with a blue arrowhead pointing to the right.
- Layout Field in Next Column
- Do not include field on printouts
- Field ID:
- Buttons: and

Click on the **OK** button to save your field.

18. Click on the **New Field** button to add a new field.
The **Description** will be *Spousal Occupation*.
The **Type** will be *TextField*.

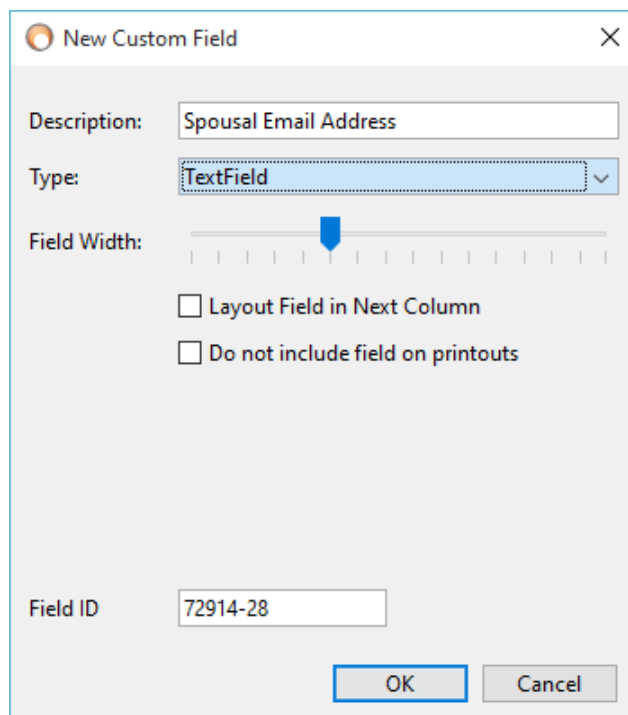


The screenshot shows a dialog box titled "New Custom Field" with a close button (X) in the top right corner. The dialog contains the following fields and options:

- Description:** A text input field containing "Spousal Occupation".
- Type:** A dropdown menu with "TextField" selected.
- Field Width:** A horizontal slider with a blue handle positioned in the middle.
- Layout Field in Next Column
- Do not include field on printouts
- Field ID:** A text input field containing "72914-19".
- Buttons: "OK" and "Cancel" at the bottom right.

Click on the **OK** button to save your field.

19. Click on the **New Field** button to add a new field.
The **Description** will be *Spousal Email Address*.
The **Type** will be *TextField*.



The screenshot shows a dialog box titled "New Custom Field" with a close button (X) in the top right corner. The dialog contains the following fields and options:

- Description:** A text input field containing "Spousal Email Address".
- Type:** A dropdown menu with "TextField" selected.
- Field Width:** A horizontal slider with a blue handle positioned in the middle.
- Layout Field in Next Column
- Do not include field on printouts
- Field ID:** A text input field containing "72914-28".
- Buttons: "OK" and "Cancel" at the bottom right.

Click on the **OK** button to save your field.

20. Click on the **New Field** button to add a new field.
The **Description** will be *Spousal Address*.
The **Type** will be *DropDown*.

Again you will notice that the bottom part where the header Name is shown will be available to edit.
Click on the **+ symbol** to add a new options to your drop down menu.

The options you will add are:
Same as current selected client
Different (please specify below)

The screenshot shows the 'New Custom Field' dialog box. The 'Description' field contains 'Spousal Address'. The 'Type' dropdown is set to 'DropDown'. The 'Field Width' is adjustable. There are two checkboxes: 'Layout Field in Next Column' and 'Do not include field on printouts', both of which are unchecked. Below these is a list of options: 'Name', 'Same as current selected client', and 'Different (please specify below)'. There are '+' and '-' buttons next to the list. The 'Field ID' is '72914-22'. At the bottom are 'OK' and 'Cancel' buttons.

Click on the **OK** button to save your field.

21. Click on the **New Field** button to add the following 5 fields in this following order:
Address, City, Province, Postal Code and Country.

Please note the **Description** and the **Type** for each of them. The same procedure is applied when creating these new fields.

The screenshot shows the 'New Custom Field' dialog box for 'Address'. The 'Description' is 'Address', 'Type' is 'TextField', and 'Field ID' is '72914-23'. The 'Layout Field in Next Column' and 'Do not include field on printouts' checkboxes are unchecked. 'OK' and 'Cancel' buttons are at the bottom.

The screenshot shows the 'New Custom Field' dialog box for 'City'. The 'Description' is 'City', 'Type' is 'TextField', and 'Field ID' is '72914-24'. The 'Layout Field in Next Column' and 'Do not include field on printouts' checkboxes are unchecked. 'OK' and 'Cancel' buttons are at the bottom.

The screenshot shows the 'New Custom Field' dialog box for 'Province'. The 'Description' is 'Province', 'Type' is 'TextField', and 'Field ID' is '72914-25'. The 'Layout Field in Next Column' and 'Do not include field on printouts' checkboxes are unchecked. 'OK' and 'Cancel' buttons are at the bottom.

The screenshot shows the 'New Custom Field' dialog box for 'Postal Code'. The 'Description' is 'Postal Code', 'Type' is 'TextField', and 'Field ID' is '72914-26'. The 'Layout Field in Next Column' and 'Do not include field on printouts' checkboxes are unchecked. 'OK' and 'Cancel' buttons are at the bottom.

The screenshot shows the 'New Custom Field' dialog box for 'Country'. The 'Description' is 'Country', 'Type' is 'TextField', and 'Field ID' is '72914-27'. The 'Layout Field in Next Column' and 'Do not include field on printouts' checkboxes are unchecked. 'OK' and 'Cancel' buttons are at the bottom.

22. Your final *Misc. Contact Information* template should look like this:

The screenshot shows a contact form window titled "David Palmer - Contact". The form is divided into several sections:

- Language:** A dropdown menu.
- SIN:** A text input field.
- Number of dependants:** A row of checkboxes labeled 0 through 6.
- Dependant #1-6:** Six pairs of text input fields for Name and DOB, each with a small calendar icon next to the DOB field.
- Marital Status:** Radio buttons for Single, Married, and Divorced.
- Spousal Information:** Text input fields for Spousal First Name, Spousal Last Name, Spousal DOB (with calendar icon), Spousal SIN, Spousal Occupation, Spousal Email Address, Spousal Address (dropdown), Address, City, Province, Postal Code, and Country.

Not only can you create your own fields to create templates which will benefit your team but when a custom field is created you will be able to do an **advance search** using these custom fields.

For example I want to search for all married contacts that have number of dependants of 2.

In you **Advance Search** options under the Contacts window view make sure to have the option **Match All of the Following** selected. Next **Select your Custom Field** you want to use as a filter.

The screenshot shows the "Advanced Search" interface. At the top, there are navigation buttons: "Inbox", "Contacts", "Tasks", "Calendar", "Notes", "Projects", "File Store", and "Show My Day". The "Advanced Search" button is circled in red. Below the navigation bar, there are two radio buttons: "Match all of the following" (which is selected and circled in red) and "Match any of the following". A dropdown menu is open, showing a list of fields: Name, Contact Notes, Birthday Date, Home Phone, Work Phone, Cell Phone, Email, Work Email, Home Email, Company, URL, Work URL, Home Fax, Work Fax, Pager, Personal/Business, Home Address, Business Address, Categories/Tags, and "Select Custom Field..." (which is circled in red).

By adding the custom fields *Number of Dependants IS 2* and *Marital Status IS Married* the system will search for all your contacts matching all these 2 criteria.

The add a new filter to your advance search click on the + symbol.

Advanced Search interface showing search criteria: Number of dependants: is 2, Marital Status: is Married. A red circle highlights the + symbol in the top right corner of the search criteria area.

Name	Work Phone	Work Email	Birthday Date	Service Profile
Bill Buchanan	(604)978-9797	bill@work24test.com	1-Jan-1975	AAA profile
David Palmer	(416)566-8767 Ext 3000	david@work24test.com	1-Aug-1975	A profile

Any type of custom fields you add to your custom tab can be filtered under the respective window you created these fields (in this case we created the **Misc. Contact Information** tab and fields under Contacts).