

# **Contacts Module**

## **INTRODUCTION**

The **Contacts Module** allows users to create and save all contact related information. The UVC **Contacts Module** is integrated with Google Maps and VoIP phone systems. The client's name, e-mail address, home and business address information can all be captured in this module and be viewed at a glance using the summarized detail pane window. Store and organize contact information and the companies they work for as well as create links and relationships between the individual records. The journal activity feature will link related records together and allows for easy access to relevant history related to the client. Users also have the option to create custom forms and record types to capture information that is most important to the type of business.

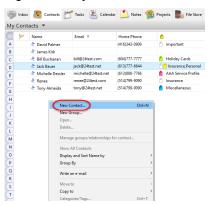
To access the **Contacts Module from** the Tab view simply click on the Contacts Module tab, if you are in the Special view simply click on the large Contacts Module button on the left.

nta	acts 🔻						Quick Search Categori	ies/Tags: All v View: All Active v
1	Name	Email 🔻	Home Phone	<b>6</b>	Birthday Date	Service Profile	Work Phone	Contact Detail File Attachments Journal Activities
	total Palmer 🗧		(416)343-0909	Important	1-Aug-1975		(416)566-8767 Ext 3000	
	James Kirk							<u> </u>
	🕂 Bill Buchanan	bill@24test.com	(604)777-7777	Holiday Cards	1-Jan-1975	Elite Profile	(604)978-9797	
	🕆 Jack Bauer	jack@24test.net	(613)777-6644	📋 🦲 Insurance, Personal	1-Sep-1976		(613)333-44444	
	🛧 Michelle Dessler	michelle@24test.net	(613)888-7766	AAA Service Profile	1-Oct-1977	AA Profile	(613)787-4545	Jack Bauer
	🦟 Renee	renee@24test.com	(514)799-9090	Insurance	1-Nov-1978	Elite Profile	(403)898-9090	
	Tony Almeida	tony@24test.net	(514)799-9090	Miscellaneous	1-Dec-1979	Elite Profile	(514)909-8787 Ext 2009	Display Name: Jack Bauer Birthday: 1-Sep-1976
								Home Address: Maling Address 35 Antares Drive, Suite 200 Ottawa, ON CANADA K2E 881 Show on Map
								Contact Notes

#### To Add a New Contact

To add a new contact to the database use the following steps:

1. Right click anywhere in the white area of the contacts module and select New Contact from the menu.



Or click on the New Contact button located on the upper left side of the screen.

O ove - oniversal village conaboration suite								
File View Contact Messenger Go Tools Window	Help							
🔇 New Contact) 📔 Open 🕺 Delete 🖙	Forward VCard	I 🚳 Print 👘 👻 🚧 Foll	ow Up 📑 Detail I	Pane 🔍 Advar	nced Search 🛛 😴 Show M	ly Day		
My Status Online Away Busy Invisible	🗐 Inbox	Contacts 🚩 Tasks	🖄 Calendar 볼	🛛 Notes   Motes	rojects 🔜 File Store			
UVCTest1 - Home Profile (Online)	My Cont	acts 🔻						Quick Search
My Contacts		Name	Email	Home Phone	•	Birthday Date	Work Phone	Service Profile
· ·	(A	Contacts						
	B	🖈 James Kirk						
	C	★ Michelle Dessler	michelle@24test	(613)888-7766		1-Oct-1977	(613)787-4545	AA Profile
	D	Mainthead Active Act						
	6	★ David Palmer		(416)343-0909	Important	1-Aug-1975	(416)566-8767 Ext 3000	
	-	t Renee	renee@24test.com	(514)799-9090	Insurance	1-Nov-1978	(403)898-9090	Elite Profile
	1	オ Jack Bauer	jack@24test.net	(613)777-6644	1 Insurance, Personal	1-Sep-1976	(613)333-44444	
	G	★ Tony Almeida	tony@24test.net	(514)799-9090	Miscellaneous	1-Dec-1979	(514)909-8787 Ext 2009	Elite Profile

2. Fill out the appropriate information for the contact you are adding in each of the appropriate tabs. The General tab contains name related information as well as e-mails and date of birth.

		chment Tools Window Help 🔜 Save   🌍   💥   🛷 🧊 🛄   🔞   🏠 👻 Follow Up		
Seneral	Home Busine	ess Personal/Mobile Other		
*	Title:	<b>`</b>	File under: Personal ~	
	Name:		Middle:	
	Last Name:		Nickname:	
	Display as:		Service Profile: 🗸	
		Contact is a Link/Group	Review Date:	
$\sim$	E-mail:		Primary	
	Home E-mail:		Primary	
	Work E-mail:		Primary	
	Owner:	UVC Test1 V	Birthday:	
		□ Private	✓ Create birthday event in calendar	
18thCer	ntury	✓ 8 ✓ 6 B I U = = = = = = = = = = = = = = = = = =	•≣ •≣	
				^

Note: We highly recommend that the main e-mail address, which the contact wants to receive his/her e-mails, is indicated with the option **Primary**. This option will allow you to send e-mails only to that specific e-mail address instead of all the contact's e-mail addresses when using the option **Write an e-mail -> Use BCc (Primary e-mail only)** 

The **Home** tab is where you can enter the contact's home address information and phone numbers.

eneral Home Business	Personal/Mobile Other	 ▼ Follor		
Home				
Address:		Co	ountry Code:	
		н	ome Phone:	
		Pł	ione 2:	
City:		Fa	x:	
Prov./State:				Change Phone Template
Postal/Zip:				
Country:	~			

The **Business** tab is where you can enter the contact's business address information, phone and fax number.

🔚 Save and Close 🔚 Save 🦪 🖌 🛷 🖌 🛈 🕅	🖌 👻 Follow Up
General Home Business Personal/Mobile Other	
Business	
Address:	Country Code:
City:	Fax:
Prov./State:	Change Phone Template
Postal/Zip:	Company:
Country: V	Occupation:
This is the mailing address	
URL Address:	

The **Personal/Mobile** tab is where you can enter the contact's mobile phone information.

Save and Close 🔜 Save 🧳 🕺 😵 🗊 🛄 🔞 🕅 👻 🚧 Follow Up
General Home Business Personal/Mobile Other
Personal/Mobile
Country Code: Mobile Phone:   Pager: Change Phone Template
URL Address:

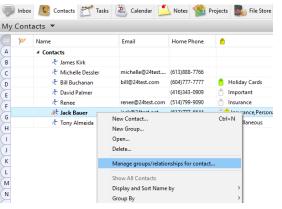
## Contact is a Link/Group

This option should be checked if the contact being added is intended to be a parent contact that other contacts can link to. For instance, if you would like to link members of the same family together, you can set one of the family members as a Group/Link and then link the other members of the family to this client. This box only applies to linking contacts. If you are not linking the contact, this box should be <u>left</u> unchecked.

G s	ave and Close	🔜 Save 🤿 🕺 ổ 🗊 📋 🕅 🖿 🊧 Follow Up			
Linked	Categories: 🕐 🕻	Insurance,Personal			
Genera	Home Busine	ess Personal/Mobile Other Journal Activities Misc. Contact Information KYC Info			
*	Title:	~	File under:	Business 🗸	
	Name:	Jack	Middle:		0.24
	Last Name:	Bauer	Nickname:		21
	Display as:	Jack Bauer 🗸	Service Profile:	~	
	~	Contact is a Link/Group Add Group to View Filter	Review Date:	5-Jan-2016 🏝	
	E-mail:	jack@24test.net	Primary		1
	Home E-mail:		Primary		
	Work E-mail:	jack@work24test.com	Primary		
	Owner:	UVC Test1 V	Birthday:	1-Sep-1976	
		Private		Reset Birthday Link	

- 3. After entering the appropriate information you can now add the contact. You can do this by clicking on **Save and Close** button.
- If this contact is an individual you are **done** adding your My Contacts 
   contact.
   My Contact

But if this contact should be linked to other contacts then right click on the new "contact link/group" you created and select the option **Manage** groups/relationships for contact...



You can view and set the links between contact

ou can link this contact to the following groups: Root Contact List / No Group

The following list shows all contacts linked to this group:

O Links for Jack Bauer

Bill Buchanan
 David Palmer
 James Kirk
 Michelle Dessler
 Renee
 Tony Almeida

5. Select all contacts that should be part of this group using the clients name listed at the bottom of that screen.

Click the **OK** button to save your changes.

#### To Add a New Group Contact

A group contact is a contact that you can link other contacts to and is the same as selecting "Contact is a Link/Group" for a client. For instance, if you wanted to enter the Smith Family on UVC you could create "Smith Family" as a group contact and then link all other members of the family to it.

To add a new contact to the database use the following steps:

 Right click anywhere in the white area of the address book and select New Group from the menu.

P	Inbox	Contacts	🚩 Tasks	🆄 c	alendar	칠 Notes	🕵 Projects	No File	e Store
My	Conta	acts 💌							
All	W	Name			Email 🔻		Home Phone		
A		4 Contacts							
B		🖈 David I	Palmer				(416)343-0909	٢	Impo
C		🖈 James	Kirk						
D		🕂 Bill Buo	thanan	ł	bill@24te	st.com	(604)777-7777	<u> </u>	Holid
E		🛧 Jack Ba	uer	j	ack@24te	est.net	(613)777-6644	٢	🗂 Insu
F		🦈 Michel	le Dessler		michelle@	024test.net	(613)888-7766		AAA
G		🥂 Renee		r	renee@24	ltest.com	(514)799-9090	٢	Insur
H		🕂 Tony A	lmeida	t	tony@24t	est.net	(514)799-9090	<b>(</b>	Misce
H									
J			New Co	ntact			Ctrl+N		
ĸ			New Gro	oup					
L			Open						
-			Delete						

OK Cancel

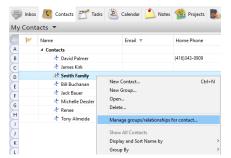
- 2. Fill out the appropriate information for the group contact you are adding (usually the Name will suffice).
- 3. After entering the appropriate information you can now add the contact. You can do this by clicking on **Save and Close** button.

General	Home Busin	ess Personal/Mobile Other Misc. Contact Information KYC Info		
*	Title:	~	File under: Personal ~	
	Name:	Smith Family	Middle:	- 20000000
	Last Name:		Nickname:	
	Display as:	Smith Family ~	Service Profile: 🗸 🗸 🗸	
		Contact is a Link/Group 🔽 Add Group to View Filter	Review Date:	

Note: The option **Add Group to View Filter** will allow this new group to be filtered using the drop **View** down menu located on the upper right corner of the **Contacts Module**.

Categories/Tags: All	✓ View: All Active ✓ Share
	All Active
Nork Phone	Personal
	Business
116)566-8767 Ext 3000	Prospect
	Inactive
	Smith Family

4. Right click on the new "contact link/group" you created and select the option **Manage** groups/relationships for contact...



 Select all contacts that should be part of this group using the clients name listed at the bottom of that screen. Click the **OK** button to save your changes.

You can link this cor	tact to the following grou	ps:	
Root Contact List	/ No Group		
	ws all contacts linked to t	his group:	
Bill Buchanan	ws all contacts linked to t	his group:	
Bill Buchanan David Palmer	ws all contacts linked to t	his group:	
Bill Buchanan David Palmer Jack Bauer	ws all contacts linked to t	his group:	
Bill Buchanan David Palmer Jack Bauer James Kirk	ws all contacts linked to t	his group:	
Bill Buchanan David Palmer Jack Bauer	ws all contacts linked to t	hit group:	
Bill Buchanan David Palmer Jack Bauer James Kirk	ws all contacts linked to t	his group:	

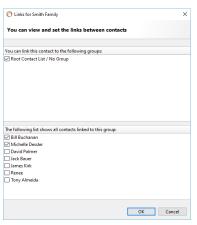
6. To view your new groups make sure that your option Group By and Groups. If this option is not selected you will not be able to view the contacts linked to your groups in the list however you can still see linked contacts in the details pane on the right when clicking on the contact.

	rme Contacts & David Palmer	Email 🔻	Home Phone	٥	Birthday Date	Service Profile	Work Phone
	★ David Palmer						
			(416)343-0909	Important	1-Aug-1975		(416)566-8767 Ext 3000
	🖈 James Kirk						
	4 🥂 Smith Family						
- 1	🖈 Bill Buchanan	bill@24test.com	(604)777-7777	Holiday Cards	1-Jan-1975	Elite Profile	(604)978-9797
	🕂 Michelle Dessler	michelle@24test.net	(613)888-7766	AAA Service Profile	1-Oct-1977	AA Profile	(613)787-4545
	₹ Jack Bauer	jack@24test.net	(613)777-6644	🖱 📋 Insurance, Personal	1-Sep-1976		(613)333-44444 Ext
	🛧 Michelle Dessler	michelle@24test.net	(613)888-7766	AAA Service Profile	1-Oct-1977	AA Profile	(613)787-4545
	🛧 Renee	renee@24test.com	(514)799-9090	Insurance	1-Nov-1978	Elite Profile	(403)898-9090
	🛧 Tony Almeida	tony@24test.net	(514)799-9090	Miscellaneous	1-Dec-1979	Elite Profile	(514)909-8787 Ext 2009
	Show A		contact				
	Group			None			
		in e-mail	3	Categories/Tags Personal/Business			
	Movet	10	1	Company			

#### Un-Linking Contacts from a Group

If you have a contact that is linked to a group that you would like to remove the link for use the following steps:

- 1. Find the group that you would like to remove the linked contact from.
- 2. Right click on the group and select the option Manage groups/relationships for contact... from the menu.



- 3. In the bottom part of the window that appears you will see a list of all your address book contacts. Find the contacts that you would like to remove from being linked under this parent contact and remove the check mark in the Link column.
- 4. Click on **OK** to save your changes.

#### Journal Activities

This tab on the client information card keeps track of all of the linked activities that have taken place for a particular contact. For instance, if you have entered any tasks, appointments or notes that are linked to a contact, a record of them will appear in this area.

To access the journal activities for a contact use the following steps:

- 1. Find the contact that you would like to view the journal activities for.
- 2. Double click on the contact.

🔒 Sa	🔚 Save and Close 📓 Save 💣 🗡 🥵 🗊 🗋 🕕 🏠 😽 Follow Up									
Linked C	Linked Categories: 🍵 AAA Service Profile									
General	Home Busine	ss Personal/Mobile Other Journal Activities								
t	Title:	~	File under:	Business V						
	Name:	Michelle	Middle:							
	Last Name: Dessler		Nickname:							
	Display as:	Michelle Dessler 🗸	Service Profile:	AA Profile						
		Contact is a Link/Group	Review Date:	4-Dec-2015						
	E-mail:	michelle@24test.net	Primary							
	Home E-mail:	michelle@home24test.ca	Primary							
	Work E-mail: michelle@work24test.com		Primary							
	Owner:	UVC Test1 v	Birthday:	1-Oct-1977						
		Private	Create birtho	day event in calendar						

3. Click on the **Journal Activities** tab along the top of the screen. If you do not see a journal activities tab it is because there have been no activities linked to that contact.

The One-Line View will show	🔜 Save and Close 🔜 Save  🧭 🧭 🗊 🔟 🔞 🏠 🔫 Follow Up							
you the e-mails, tasks,	Linked Categories: 💧 AAA Service Profile							
appointments and notes information in a single line	General Home Business Person	al/Mobile Other Journal Activities						
	Journal Activities							
view.	Dpen 🧭 Send E-mail	🞢 New Task 🔌 New Appointment  🎽	New Note 🛛 New Project	One-line View Multi-line View	View: All ~			
	Туре 🔻	Description	Date	Status	Owner Name			
	🛎 Appointment/Event Birthday	Birthday for: Michelle Dessler	1-Oct-1977	None	UVC Test1			
	📂 Task	Quaterly calls	Mon, Feb 29	V Completed	UVC Test1			
	🛃 Task	Quaterly calls	Sun, Jun 5	In Progress	UVC Test1			
	🛃 Task	Annual meetings	Sun, Dec 4	In Progress	UVC Test1			

The Multi-line View will show	🔚 Save and Close 🔚 Save   🥪 メ   💖 🗊 🗂 🗍 🕅 💌 🊧 Follow Up	
you more content of the	Linked Categories: 🍵 AAA Service Profile	
selected e-mails, tasks,	General Home Business Personal/Mobile Other Journal Activities Misc. Contact Information KYC Info	
appointments and notes	Journal Activities	
information.	🍧 Open 🛛 🔗 Send E-mail 🛛 🕂 New Task 🖉 New Appointment 1 New Note 🖉 New Projec	t One-line View Multi-line View: All View:
	Sort By Date (Descending) ▼	Status
College next year in Regina) - RRSP		in Progress
	UVC Test1 Sun, Jun 5 Quateriv calls	
		In Progress
	UVC Test1 Mon, Feb 29 Quaterly calls 🗂	√ Completed
	UVC Test1 1-Oct-1977 Birthday for: Michelle Dessler 🛎	None

4. From this tab you can also create new e-mails, tasks, appointments and notes which will be directly linked to the selected contact.

General Home B	usiness Person	nal/Mobile Oth	er Journal Activities							
Journal Activ	vities									
Dnen 🖉	Send E-mail	Mew Task	🔍 New Appointment	📩 New Note	Mew Project	One-line View	Multi-line View	View:	All	~

You can also create new e-mails, tasks, appointments and notes which will be directly linked to the selected contact by right clicking on the selected contact and then choosing the appropriate new action.

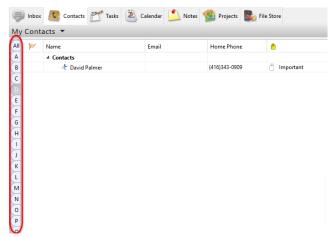
New Task for Contact
New Appointment for Contact
New Note for Contact
New Project Task for Contact

#### To Find a Contact

If you have added a large number of contacts and do not wish to scroll up and down to find them, simply type the 2 or 3 first letters of the contacts first name in the **Quick Search** field. The screen should then automatically filter the contacts and display only the ones with the 2 or 3 first letters thus saving you the trouble of scrolling. You can also type the full name if you wish.

9	Inbox	Contacts 🔭 Tasks 🙆 C	alendar 칠 Notes 🕇	😫 Projects 🛛 🛼 File	Store			
Му	Conta	acts 💌		(mic X)Categori	es/Tags: All			
All	ø	Name	Email	Home Phone		Birthday Date	Work Phone	Service Profile
A								^
В		≁ Michelle Dessler	michelle@24test.net	(613)888-7766		1-Oct-1977	(613)787-4545	AA Profile
C								
D								

You can also use the alphabet directory located on the right side. Depending on the **Display and Sort Name by** option you have selected when you click on the letter on your choice all names beginning with that letter will be displayed. Click on the **All** option to view all your contacts on your screen.



## To View/Edit an Existing Contact

To view or edit an existing contact's information use the following steps:

- 1. Find the contact you would like to edit.
- 2. Double click on the contact or right click on the contact and select Open from the menu. You should then see the contact's information.
- 3. If you are editing the information, make the necessary changes and click on **Save and Close** or use the Enter key on the keyboard. If you have not made any changes but just wanted to view the information, simply click on the X in the top right hand corner of the screen when you are finished.

## To View a Contact's Detail at a glance

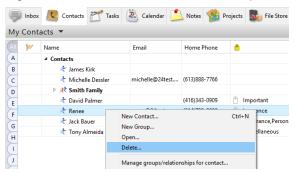
To view a contact's detail information without having to edit the contact simply click once on the contact's name on the main screen. Information pertinent to that selected contact will be shown on the **Contact Detail** screen (the location of this screen is dependent on your **Detail Pane Location** for your Contacts Module).

Con	tacts 🔻						Quick Search	Categories/Tags: All View: All Active V Sh
<u>۲</u>	Name	Email	Home Phone		Birthday Date	Work Phone	Service Profile	Contact Detail File Attachments Journal Activities
	4 Contacts							
	🧶 James Kirk							22.7
	Ar Michelle Dessler	michelle@24test	(613)888-7766		1-Oct-1977	(613)787-4545	AA Profile	
	🕨 🥂 Smith Family							David Palmer
	🥕 David Palmer		(416)343-0909	Important	1-Aug-1975	(416)566-8767 Ext 3000		David Paimer
	nt Renee	renee@24test.com		Insurance	1-Nov-1978	(403)898-9090	Elite Profile	
	nt Jack Bauer		(613)777-6644	🖱 🗂 Insurance, Personal	1-Sep-1976	(613)333-44444 Ext		Display Name: David Palmer Birthday: 1-Aug-1975
	🛧 Tony Almeida	tony@24test.net	(514)799-9090	Miscellaneous	1-Dec-1979	(514)909-8787 Ext 2009	Elite Profile	Birthday: 1-Aug-1975 Age: 40
								33 Anthree Drive Suite 200 Orberto, CM CANADA IZE (B) <u>Bournens Madrees</u> 1224 House Drive Toronte, CANADA KIRMIN <u>Browen Kang</u>
								Contact Notes

#### To Delete a Contact

To delete an existing contact use the following steps:

- 1. Select the contact you would like to delete.
- 2. Right click on the contact and select the option **Delete...** from the menu.



You should then get the following warning:



3. Click Yes to confirm delete.

Warning: Please exercise caution when deleting contacts. The action cannot be reversed.

## **Display and Sort Name By**

You are able to display how your contacts are listed in your Address Book list.

To change how your contacts are listed please use the following steps:

- Right click anywhere in the white area of the Contacts Module and select **Display and Sort Name by**. You should then get another menu giving you 4 options of how you would like to display the names.
- 2. Select the option you want by clicking on it. Your contacts will now display in that order.

Ţ	Inbox	Contacts	🌱 Tasks	🚵 Calendar 🗾	🖌 Notes   🕺 P	rojects 😡 F	ile Sto	ore	
My	Conta	acts 🔻							
AII	ø	Name		Email	Home Phone	•			Birthday Date
B		🖈 James Kirk							
C		🖈 Michelle D	essler	michelle@24test	(613)888-7766				1-Oct-1977
D		🕨 巷 Smith Fan	nily						
E		🦟 David Paln	ner		(416)343-0909	Importan	t		1-Aug-1975
F		🦟 Renee		ronco@24tact.com	(514)700.0000	Ctrl+N	1		1-Nov-1978
$\geq$		🖈 Jack Bauer		New Contact	Pers	sonal	1-Sep-1976		
G		Tony Alme	ida	New Group			ous		1-Dec-1979
H				Open					
(1				Delete					
				Manage groups/re	lationships for cor	ntact	L .		
K				Show All Contacts					
M				Display and Sort N	ame by	;	•	First La	st
$\geq$				Group By				Last, Fi	rst
N				Write an e-mail				Nickna	me - First Last
0				Call Contact	First La	st (Nickname)			
P				Call Contact				Display	Name
Q				Move to		>	-	_	

## To View and Work with Contacts for Another User

If a user has given you access to their Contacts Module you may be able to view, add, delete and modify that users contacts based on the access level they have given. Simply select the users name from the drop down list towards the top left of the screen where it says My Contacts and you will be able to see and work with all of their shared contacts.

📄 Inb	ox 🚺 Contacts 🔭 Tasks	🚵 Calendar 🗾	🖌 Notes   😫	Projects 🛛 🙀 File Stor	2	
1y Cor	ntacts 🔻 🗲 🗕 🗕					
ly Conta	cts					
ohn Doe						
A	4 Contacts					
в	🥕 James Kirk					
с	★ Michelle Dessler	michelle@24test	(613)888-7766		1-Oct-1977	(613)787-4545
D	🖻 🥂 Smith Family					
	🕂 David Palmer		(416)343-0909	Important	1-Aug-1975	(416)566-8767 Ext 3000
	★ Renee	renee@24test.com	(514)799-9090	Insurance	1-Nov-1978	(403)898-9090

## To e-mail a Single Contact

Once contacts have been added to the contact list, you will then be able to send them e-mails directly from this screen. To do this UVC must be configured with at least one e-mail account.

All 🎾 A B C

To send an e-mail to a single contact's e-mail address use the following steps:

- Find the contact you would like to send the email to.
- 2. Click once on the contact
- Right click and select the option Write an email.
- 4. Click on the e-mail address you would like to send the e-mail to.
- 5. A new message screen will now be launched and you will be able to write and send an e-mail.

box	-	🏝 Calendar 📫	Notes 🕵 F	Projects 😡 F	ile Store			
bnt ⊭	Name	Email	Home Phone	•		Birthday Date	Work Phone	
	<ul> <li>✓ Contacts</li> <li>★ James Kirk</li> <li>★ Michelle Dessler</li> <li>★ Smith Family</li> </ul>	michelle@24test	(613)888-7766			1-Oct-1977	(613)787-4545	
	≁ Bill Buchanan ≁ David Palmer	bill@24test.com	(604)777-7777 (416)343-0909	<ul> <li>Holiday C</li> <li>Important</li> </ul>		1-Jan-1975 1-Aug-1975 1-Nov-1978	(604)978-9797 (416)566-8767 Ext 30	
	そ Renee そ Jack Bauer そ Tony Almeida	Show All Contacts	New Gontact Ctrl+N New Group Open Detete Manage groups/relationships for contact Show All Contacts Display and Sort Name by			al 1-Sep-1976 (613)33-4444 Ext 1-Dec-1979 (514)909-8787 Ext 2		
		Write an e-mail Call Contact Move to Copy to		2	Busin Home	@24test.com ess E-mail: renee@ e E-mail: renee@h E-mail Window		

Note: If a window does not open allowing you to compose an e-mail, your UVC is not configured to send e-mails from an e-mail account. To continue, configure your UVC and repeat these steps.

## To e-mail Multiple Contacts

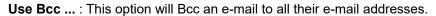
Once you have added contacts to your contact list you are able to send them e-mails directly from UVC. To do this you must have your e-mail account already setup and configured in UVC. You are able to send e-mails to multiple contacts or Cc/Bcc contacts directly out of UVC.

To send an e-mail to multiple contacts please use the following steps:

- 1. Search and select the clients you want to send an e-mail too.
- 2. Right click and select the option **Write an e-mail** from the menu.

You will have 3 different options at your disposal:

) 	₹ Renee	renee@24test.com (514)799-9090	Insurance	1-Nov-1978	(403)898-9090
G	t Jack Bauer	jack@24test.net (613)777-6644	nsurance, Personal	1-Sep-1976	(613)333-44444 Ext
Н	★ Tony Almeida	New Contact	Ctrl+N	1-Dec-1979	(514)909-8787 Ext 2009
I J K L M N O P		New Group Open Delete Manage groups/relationships fo Show All Contacts Display and Sort Name by Group By			
Q		Write an e-mail	2	Use Bcc	
R		Call Contact	2	Use Bcc (Primary e-	mail only)
S		Move to	2	Open E-mail Windo	w



/S Ren	ee - Contact				-		×
File Edi	t Format Attac	hment Tools Window Help					
🔚 Sa	ve and Close	🚽 Save  🚿 😵 🗊 🗋 🕅 👘 👻 🌠 Follow Up					
General	Home Busine	ss Personal/Mobile Other Journal Activities Misc. Contact Information KYC Info					
た	Title	Other ~	File under:	Personal ~			
	Name:	Renee	Middle:				
	Last Name:		Nickname:			•••	
	Display as:	Renee ~	Service Profile:	Elite Profile ~		Y.	
		Contact is a Link/Group	Review Date:	21-Jan-2016 🚨		-	-
	E-mail:		Primary				
S	E-mail:	renee@24test.com	Primary				
	Home E-mail:	renee@home24test.com	Primary				
	Work E-mail:	renee@work24test.net	Primary				
	_						
	Owner:	Alex Test1 🗸	Birthday:	1-Nov-1978			
		Private		Reset Birthday Link			

**Use Bcc (Primary e-mail only)** ... : by default this option will Bcc an e-mail to all selected contacts and their **Primary** e-mail address only (identified by a check box).

/C Ren	ee - Contact					-		×
File Edi	t Format Attac	hment Tools Window Help						
📄 Sa	ve and Close	🔜 Save  🕉 🥵 🗊 🗋 🕅 👘 👻 🌠 Follow Up						
General	Home Busine	ess Personal/Mobile Other Journal Activities Misc. Contact Information KYC Info						
×	Title:	Other ~	File under:	Personal 🗸				
	Name:	Renee	Middle:					
	Last Name:		Nickname:				· · · ·	
	Display as:	Renee ~	Service Profile:	Elite Profile	$\sim$		Y.	
		Contact is a Link/Group	Review Date:	21-Jan-2016	2			
	E-mail:	renee@24test.com	Primary					
	Home E-mail:	renee@home24test.com	Primary					
	Work E-mail:	renee@work24test.net	Primary					
	Owner:	Alex Test1 🗸	Birthday:	1-Nov-1978				
		Private		Reset Birthday Link				

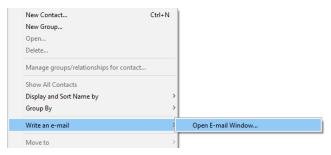
*Note:* If no **Primary** e-mail address was selected for a contact it will automatically use the first e-mail from the list beginning with a valid e-mail address.

**Open E-Mail Window** ... : this option will send an e-mail to all selected contacts and to all their e-mail address's in the **To** field of the new e-mail message. If one or more contacts have more than one e-mail those contacts will receive that e-mail more than once (one copy to each of the e-mail addresses).

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File Edit Format Attachment Tools Window Help	
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To: Renee ; Renee ; Michelle Dessler ; Michelle Dessler ; Michelle Dessler ;	
Show Cc and Bcc Quick Action after Send: No Action	~
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To Cc and/or Bcc and e-mail to contacts please use the following steps:

- 1. Right click anywhere in the white space of your **Contacts Module**.
- 2. Select Write an e-mail from the menu then select the option Open e-mail Window.



3. A new Create Message window will pop-up. You can toggle between Show/Hide Cc and Bcc option.

≫ Untitled - Message File Edit Format Attachment Tools Window Help	🧭 Untitled - Message File Edit Format Attachment Tools Window Help
🔗 Send   Save as Draft 🐗 🛷 🗊 📋	🧭 Send 🛛 🔚 Save as Draft  😽 🗊
To:	To:
Show Cc and Bcc	Hide Cc and Bcc
Subject:	Cc:
vrial 🗸 10 🗸 🕄 B	Bcc:
,	Subject:
	Arial ~ 10 ~ 🕄 B

- 4. Click on either the To or Cc or Bcc field to add your contact.
- 5. A list of all your contacts with be displayed. You are able to move the contacts that you would like to send the e-mail to by placing a check mark in the box beside their name and clicking on the **To>** button to move the contacts to the box on the right. You are able to do the same thing for contacts that you wish to Cc and Bcc. Simply use the **Cc>** and **Bcc>** buttons.

If you have a large list of contacts and need to find a specific one you can do this by using the find feature at the top of the screen. This find field will search for any data that was entered on the contact information sheet such as name, address or phone number. You are also able to search by Categories/Tags and by groups.

	🥬 Recipien	ts					×
	My Contacts	· ~		٩	All Active	~	
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	Select users to	o send mess	age to				
0	□ た Bill Bu □ た Bill Bu □ た David I □ た Jack Bi □ た Jack Bi □ た Jack Bi □ た Jackes □ た Michel □ た Michel □ た Michel □ た Renee	chanan <bil chanan <bil Palmer <da auer <jack@ auer <jack@ Kirk <jame Ile Dessler &lt; Ile Dessler &lt; <renee@24< th=""><th>I@24test.com&gt; I@work24test.cc I@hore24test.c work24test.com /24test.net&gt; .k.work@test.ca michelle@24test michelle@work/ michelle@horme test.com&gt; ork24test.net&gt;</th><th>com&gt; com&gt; i&gt; t.net&gt; 24test.com&gt;</th><th></th><th></th><th></th></renee@24<></jame </jack@ </jack@ </da </bil </bil 	I@24test.com> I@work24test.cc I@hore24test.c work24test.com /24test.net> .k.work@test.ca michelle@24test michelle@work/ michelle@horme test.com> ork24test.net>	com> com> i> t.net> 24test.com>			
							~
	Recipients						
t	To >						
	Cc >						
	Bcc >						
'						OK	Cancel

Once you have moved the contacts to the appropriate recipient boxes that you would like to send your e-mail to simply click on **OK** button. You will be brought back to the Create Message window where you will be able to write and send an e-mail.

#### **Categories**

You are able to sort contacts into categories to make groups of contacts. This can be useful when searching for contacts, printing information for contacts or displaying contacts because these can all be done by category. If you would like to group contacts by categories you must first setup you categories. You can do this by going to the File menu or by using the shortcut provided in the steps below.

To group contacts by categories please use the following steps:

2. Right click on the contact and select the **Categories/Tags** option from the menu.

B     All James Kirk       C     All Michelle Dessler       M     Michelle Dessler       M     K       S     All Smith Family       B     All Michelle Dessler       M     Bill Buchanan       B     All Michelle Dessler       M     Bill Buchanan       B     All Michelle Dessler       All Michelle Dessler     (613)888-7766       All Michelle Dessler     (604)777-7777       All Michelle Dessler     Michelle Dessler       Manage groups/relationships for contact     Show All Contacts       Display and Sort Name by     Group By       Write an e-mail     Call Contact       Move to     Copy to		s <b>*</b>			
B               ↓ James Kirk            C              ↓ Michelle Dessler               michelle@24test.cm               (613)688-7766            A         Smith Family               bill@24test.com               (643)777-7777               Holiday C            A         Buil Buchanan               bill@24test.com               (604)777-7777               Holiday C            A         David Palmer               c416)343-0909               Important            A         David Palmer               cond®24test.net               (613)777-6644               Misurance            A         Tony Almeida               New Contact               Misurance            V         Open          Delete               Manage groups/relationships for contact            Show All Contacts               Display and Sort Name by             Group By            Write an e-mail               Call Contact            Move to               Copy to	Nar	me	Email	Home Phone	•
C     At Michelle Dessler     michelle@24test     (613)888-7766       At Smith Family     bill@24test.com     (664)777-777     Holiday C       At Bill Buchanan     bill@24test.com     (664)777-777     Holiday C       At Bill Buchanan     bill@24test.com     (664)777-777     Holiday C       At Bill Buchanan     bill@24test.com     (613)77-664     Important       At Renee     renee@24test.com     (513)77-6644     Important       At Tony Almeida     tony@24test.et     (513)77-6644     Important       New Contact     New Contact     Ctrl=N       New Group     Open     Delete     Minage groups/relationships for contact       Show All Contacts     Display and Sort Name by Group By     Write an e-mail     Call Contact       Move to     Copy to     Copy to     Important	⊿ (				
At Smith Family     bill@24test.com     (604)777-7777     bill@24test.com       At Bill Buchanan     bill@24test.com     (416)343-0909     important       At Bauer     jack@24test.com     (416)343-0909     important       At Bauer     jack@24test.com     (514)790-9000     important       At Tony Almeida     tons@24test.net     (514)790-9000     Miccellant       New Group     Open     Open     Ctrl=N       Delete     Manage groups/relationships for contact     Show All Contacts       Display and Sort Name by     Group By     Wite an e-mail       Call Contact     Move to     Copy to					
*     Bill Buchanan     bill@24test.com     (604)777-7777     Holiday C       *     Tony Almeida     *     Tony Almeida     *     Insurance       *     Tony Almeida     *     tony®24test.com     (514)799-0900     *     Insurance       *     *     Tony Almeida     *     tony®24test.net     (514)779-0900     *     Miscellaon       *     *     Tony Almeida     *     tony®24test.net     (518)776-644     *     Miscellaon       *     *     Tony Almeida     *     *     *     Contact     Collect       *     *     *     *     *     *     Contact     Contact       *     *     *     *     *     *     *     *       *     *     *     *     *     *     *       *     *     *     *     *     *     *       *     *     *     *     *     *     *       *     *     *     *     *     *     *       *     *     *     *     *     *     *       *     *     *     *     *     *     *       *     *     *     *			michelle@24test	(613)888-7766	
Important     (416)343-0909     Important       Important     Renee     renee@24test.com     (514)399-9909     Insurance       Important     Jack Bauer     jack@24test.net     (613)777-6644     Important       Important     Important     Contract     Contract     Contract       Important     Important     Contract     Contract     Contract       Important     Important     Important <td></td> <td></td> <td></td> <td></td> <td></td>					
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New Group Key Group Delete Manage groups/relationships for contact Show All Contacts Display and Sort Name by Group By Write an e-mail Call Contact T Move to Copy to		ᄎ Tony Almeida		(514)799-9090	Miscellaneous
Call Contact T Move to Copy to			Delete Manage groups Show All Contac Display and Sort	ts	>
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- 3. You should now see a list of available categories if you have already set them up. If you have not setup up your categories you can do it from here by clicking on **Edit Category List** and adding a new category. Place a check mark beside the category you would like to assign the contact to.
- 4. Click on **OK** button. The contact will now be part of that group or category.

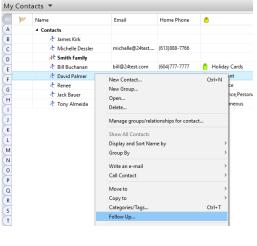
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	y Cards		
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	laneous		
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# Follow Up

You are able to flag a contact for follow up and set a reminder if you wish. You are then able to search for all of your contacts that are in need of follow ups in the detailed view.

To flag a contact for follow up please use the following steps:

- 1. Find the contact you would like to set a follow up for.
- 2. Right click on the contact and select the **Follow Up** option from the menu.
- 3. Enter the **Follow up date** you would like for the follow up.
- 4. Select the type of follow from the drop down list under the **Follow up message** option.
- 5. Enter the status in the **Set to follow up status to** drop down option list. In most cases if you are entering the follow up the status will be Flagged and you will change it to completed once it is completed.



🥮 Inbox 🧕 Contacts 🞢 Tasks 🍓 Calendar 🖄 Notes 🤹 Projects 🌉 File Store

Follow Up for David Palr	ner		×
You can view and set a	a follow up for thi	is entry	
Follow up date:		٤	Show Time
Follow up message:		~	
Set follow up status to:	Flagged	~	
	Set Reminder		
		ОК	Cancel

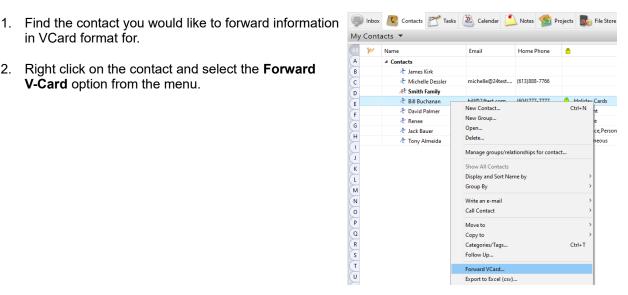
- 6. If you would like to set a reminder click on the **Set Reminder** button.
  - a) Click on the Date/Time Alert button.
  - b) Enter the time you would like the alert.
  - c) Select where you would like the alert to go by placing a check mark beside the appropriate option.
  - d) If you have selected e-mail or mobile phone, enter your address or phone number.
  - e) Click on OK button.
- 7. Click on **OK** to close the window.

## **Forward V-Card**

You are able to forward information for a contact in VCard format by e-mail directly from UVC to any contacts that you have an e-mail address for. To do this you must either have your e-mail application already setup and configured or have your Internet browser configured to send e-mails (this is usually found in you browser's preferences). You are able to forward the VCard to multiple recipients and use Cc and Bcc functions.

To forward a contact's information in VCard format please use the following steps:

- in VCard format for.
- 2. Right click on the contact and select the Forward V-Card option from the menu.



3. A lists of all your contacts with be displayed. You are able to move the contacts that you would like to send the e-mail to by placing a checkmark in the box beside their name and clicking on the To> button to move the contacts to the box on the right. You are able to do the same thing for contacts that you wish to Cc and Bcc options. Simply use the Cc> and Bcc> buttons.

If you have a large list of contacts and need to find a specific one you can do this by using the find feature at the top of the screen. This find field will search for any data that was entered on the contact information sheet such as name, address or phone number. You are also able to search by Categories/Tags and by groups.

4. Once you have moved the contacts to the appropriate recipient boxes that you would like to send your Vcard information simply click on OK button. You will be brought back to the Create message window where you will be able to write and send an e-mail.

#### Print

You are able to print 3 reports from the Address Book basic view. The Contact List report, the Contact Details report and the Contact Table List report.

To print the reports use the following steps:

- Right click anywhere in the basic view.
- 2. Select **Print** from the menu.
- 3. The available reports will be listed on the left hand side of the screen. Select the report you wish to print.
- 4. Once you select your report you will have various options available on the right hand side of the screen. Select the options you would like.

Your different Print Range options are

#### **All Contacts**

This will include all of your contacts in your report.

ontacts Contact List Contact Details Contact Table List	Contact List General Page Setup Show phone numbers Show e-mail accounts Show web addresses Show home address (Gold Edition Only) Show work address (Gold Edition Only) Print Range Null Contacts Selected Contacts
	Contacts under Selected Parent

## **Selected Contacts**

This will include only the contacts that you have selected. To select contacts go to the basic view and click on the contact, to select multiple contacts use the CTRL key.

#### **Contacts Under Selected Parent**

This will include contacts under a parent contact that you have selected. To select a parent contact in the basic view simply click on it.

- 5. Select the type of Output you would like to use from the top of the screen. You are able to choose Screen-shows you a print preview, Printer-prints to paper, HTML File-creates and Adobe PDF Filecreates a PDF file.
- 6. Click on OK button.

#### **New Task for Contact**

UVC gives you the ability to link a task to one or multiple contacts. You are able to list tasks by contact in the task view as well as view Journal Entries for each contact to see what activities have taken place for each contact.

To add a new task for **one contact** please use the following steps:

- 1. Find the contact you would like to enter a task for.
- 2. Right click on the contact and select New Task for Contact from the menu.
- 3. Enter the Task details (see To Add a Task).
- 4. Click on the Save and Close button.
- 5. If you double click on the contact from the Contact Module and go to the Journal Activity tab you will be able to see the Task you have just entered.

	Inbox	Contacts 🚩	Tasks	🖏 Calendar 「	🔪 Notes 🔮	Projects	File Store
Му		acts 🔻			-		-
All	۲	Name		Email	Home Phone		
(A		4 Contacts					
B		🖈 James Kirk					
CC		★ Michelle Des	isler	michelle@24test	(613)888-7766		
D		🥀 Smith Famil	y				
E		🕂 Bill Buchana	n	bill@24test.com	(604)777-7777	0	Holiday Cards
F		🖈 David Palme	er .		(416)343-0909	٢	Important
		t Renee		renee@2/itert.com	/51/0700.0000		Insurance
G		🖈 Jack Bauer	New 0	Contact		Ctrl+N	surance, Person
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( <u>z</u>			New 7	ask for Contact			
			New A	Appointment for Cor	ntact		
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			New F	roject Task for Cont	act		

To add a new task for **multiple contacts** please use the following steps:

- 1. Find one of the contacts you would like to enter the task for.
- 2. Right click on the contact and select **New Task for Contact** from the menu.

- 3. Enter the Task details.
- 4. Near the top right corner of the window there is a button that says **Contacts**. To add the other contacts that you would like to assign the task, click on the button.

A window will now appear that has a box on the left that lists all your contacts. You are able to move the contacts that you would like to assign the task to by placing a check mark in the box beside their name and

clicking on the > button in the middle to move the contacts to the box on the right. You are likewise able to take contacts off the list of people you are going to assign the task to by placing a check mark beside them and clicking on the < button in the middle to move them back to the box on the left.

If you have a large list of contacts and need to find a specific one you can do this by using the **Quick Search** feature at the top of the screen. This **Quick Search** field will search for any data that was entered on the contact information sheet such as

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Forward VCard...

Journal Activities.

New Task for Contact... New Appointment for Contac New Note for Contact...

New Project Task for Contact

Print...

Export to Excel (csv)..

name, address or phone number. You are also able to search by groups.

- Save

Linked Co

General

Subject:

Due Date

Folder Gr

18thCentu

- 5. Once you have moved the contacts to the boxes on the right that you would like to assign the task to simply click on the **OK** button.
- 6. Click on the Save and Close button.
- 7. If you double click on any of the contacts you have just assigned the task to from the **Contact Module** and go to the **Journal Activity** tab you will be able to see the Task you have just entered.

#### New Appointment for Contact

UVC gives you the ability to link an appointment to one or multiple contacts. Once you add an appointment that is linked to a contact you are able to view the appointment in the **Journal Activity** section for each contact to see what activities (tasks, appointments, notes) have taken place for that contact.

To add a new appointment for a contact please use the following steps:

- 1. Find the contact you would like to enter an appointment for.
- 2. Right click on the contact and select **New Appointment for Contact** from the menu.
- 3. Enter the Appointment details.
- 4. Click on the Save and Close button.
- 5. If you double click on the contact from the Address Book and go to the Journal Entries tab you will be able to see the Appointment you have just entered.

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To add a new appointment for multiple contacts please use the following steps:

- 1. Find one of the contacts you would like to enter the appointment for.
- 2. Right click on the contact and select **New Appointment for Contact** from the menu.
- 3. Enter the Appointment details.
- 4. Near the top right corner of the window there is a button that says **Contacts**. To add the other

eneral Deta	iils 🤸 Alert 🔾 Re	peat  🤾 Attende	es Availa	ble Time				
escription:						Location:		
tart Time:	8-Mar-2016	🏝 7:00 AM	$\sim$					Show Timezon
top Time:	8-Mar-2016	🛎 8:00 AM	$\sim$	🗌 All day e	event			
Calendar:	UVC Test1 V Cal	endar	$\sim$			Status:	None	

contacts that you would like to enter the appointment for click on the button.

A window will now appear that has a box on the left that lists all your contacts. You are able to move the contacts that you would like to enter the appointment to by placing a check mark in the box beside their name and clicking on the > button in the middle to move the contacts to the box on the right. You are likewise able to take contacts off the list of people you are going to assign the task to by placing a checkmark beside them and clicking on the < button in the middle to move them back to the box on the left.

My Contacts	All Active V	
Tag all Untag all		
↑ Bill Buchanan         ↓ David Palmer         ↓ Zavid Palmer         ↓ Jack Bauer         ↓ Rense         ↓ Rense         ↓ Rense         ↓ Rense         ↓ Stath Family         ↓ Tony Almeida	Renee	

If you have a large list of contacts and need to find a specific one you can do this by using the **Quick Search** feature at the top of the screen. This **Quick Search** field will search for any data that was entered on the contact information sheet such as name, address or phone number. You are also able to search by groups.

- 5. Once you have moved the contacts to the boxes on the right that you would like to enter the appointment for simply click on **OK** button.
- 6. Click on the Save and Close button.
- 7. If you double click on any of the contacts you have just entered the appointment for from the **Contacts Module** and go to the **Journal Activity** tab you will be able to see the Appointment you have just entered.

#### New Note for Contact

UVC gives you the ability to link a note to one or multiple contacts. You are able to list notes by contact in the note view as well as view **Journal Activity** for each contact to see what activities have taken place for each contact.

To Add a Note for a Contact To add a new note for a contact please use the following steps:

- 1. Find the contact you would like to enter the note for.
- 2. Right click on the contact and select **New Note for Contact** from the menu.
- 3. Enter the Note details.
- 4. Click on the Save and Close button.

Categories/Tags	Ctrl+T
Follow Up	
Forward VCard	
Export to Excel (csv)	
Print	
Journal Activities	
New Task for Contact	
New Appointment for Contact	
New Note for Contact	

New Project Task for Contact...

5. If you double click on the contact from the **Contact Module** and go to the **Journal Activity** tab you will be able to see the Note you have just entered.

To add a new note for multiple contacts please use the following steps:

- 1. Find one of the contacts you would like to enter the note for.
- 2. Right click on the contact and select **New Note for Contact** from the menu.
- 3. Enter the Note details.
- Near the top right corner of the window there is a button that says **Contacts**. To add the other contacts that you would like to assign the note, click on the **Contacts** button.

A window will now appear that has a box on the left that lists all your contacts. You are able to move the contacts that you would like to enter the appointment to by placing a checkmark in the box beside their name and clicking on the > button in the middle to move the contacts to the box on the right. You are likewise able to take contacts off the list of people you are going to assign the task to by placing a checkmark beside them and clicking on the < button in the middle to move them back to the box on the left.

🔚 Save and Close 🔚 Save 🧳 🚿 🛷 🗊 🔲 🕅 🔹 🥀 Contacts Linked Contacts: Renee General Description: Status: Pending Expiry Date: Note Date: ۵. UVC Test1  $\sim$ Note Type: Owner: +≣ +≣ 🐻 🖌 U 18thCentury ~ 8

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	Select Contacts	
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е	□ /t Bill Buchanan > Renee	
	□ ★ Jack Bauer	
	□ た Michelle Dessler □ た Renee	
	🗌 🧨 Smith Family	
n	□ た Tony Almeida	
• •		
	OK Cancel	

If you have a large list of contacts and need to find a specific one you can do this by using the **Quick Search** feature at the top of the screen. This **Quick Search** field will search for any data that was entered on the contact infromation sheet such as name, address or phone number. You are also able to search by groups.

- 5. Once you have moved the contacts to the boxes on the right that you would like to enter the appointment for simply click on **OK** button.
- 6. Click on the Save and Close button.
- 7. If you double click on any of the contacts you have just assigned the note to from the **Contacts Module** and go to the **Journal Activity** tab you will be able to see the Appointment you have just entered.

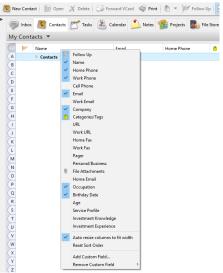
#### Column Headings

You are able to customize your column headings in the detailed view by removing columns, adding columns and changing the order of columns. You are also able to sort ascending and descending by each column.

To add or remove columns to your screen please use the following steps:

- 1. Right click on the column headers.
- Place a checkmark beside columns you would like to show and remove the checkmark from columns you would not like to show.

Note: The column header with show a column that indicates if a follow up has been entered for a contact.



#### To Move Columns

To move your columns so they are in a different order use the following steps:

- 1. Left click and hold on the column you would like to move.
- 2. Drag the column to its new location.
- 3. Release the mouse.

#### **Column Sorting**

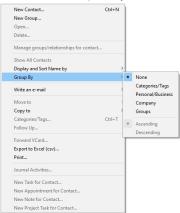
To sort your columns ascending or descending use the following steps:

- 1. Click once on the column header you would like to sort by.
- 2. Click again on the same column header to sort the data in reverse order.

## Group By

In the detailed view UVC allows you to group your contacts by different criteria for display and printing purposes. To group your contacts use the following steps.

- 1. Right click anywhere in the area of the Contacts Module.
- 2. Select Group By from the menu.
- 3. Select which option you would like to group your contacts by:



#### **Journal Activities**

You are able to see e-mails, tasks, appointments and notes in the **Journal Activity** section for each contact to see what activities have taken place for that contact.

Note: Capturing the contact's e-mail address infromation is currently necessary for the emails to appear under the contact's Journal Activity.

To view the Journal Activities of a contact use the following steps:

- 1. Select a contact from the **Contact Module**.
- 2. Right click and from the menu select the option **Journal Activities**. A pop-up window will display all Journal Activity for the selected contact.

fype ▼	Description	Date	Status	Owner Name
Task	Quaterly calls	Thu, Apr 21	In Progress	UVC Test1
🗂 Task	Annual meeting with client	22-Jan-2017	In Progress	UVC Test1

#### Navigating in the Contact List Screen

The following is an explanation of the different parts of the screen.

**A.** This is a drop down menu that allows you to switch between your address book and the address books of others who have given you access.

B. The Quick Search field allows you to search for contacts.

**C.** This Advance Search will search for any data that was entered on the contact infromation sheet such as name, address or phone number.

**D.** This area shows the column headers which can be customized to you preference. To customize them simply right click anywhere on a column header. To sort the column click on the header once, to reverse sort click on it twice.

E. The contacts that you have searched for will be listed in this area.

**F.** Any contact information will be displayed in this area

**G.** Any notes that you have written for a contact on the contact infromation card will appear in this section when the contact is selected.

