

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.

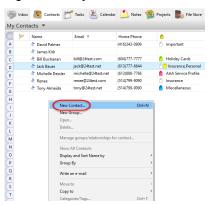
To access the **Contacts Module from** the Tab view simply click on the Contacts Module tab, if you are in the Special view simply click on the large Contacts Module button on the left.

| nta | acts 🔻 | | | | | | Quick Search Categori | ies/Tags: All v View: All Active v |
|-----|--------------------|---------------------|---------------|-------------------------|---------------|-----------------|------------------------|---|
| 1 | Name | Email 🔻 | Home Phone | 6 | 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: | ` | 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: |

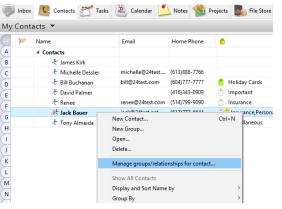
Contact is a Link/Group

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 | (| Misce |
| H | | | | | | | | | |
| J | | | New Co | ntact | | | Ctrl+N | | |
| ĸ | | | New Gro | oup | | | | | |
| L | | | Open | | | | | | |
| - | | | Delete | | | | | | |

OK Cancel

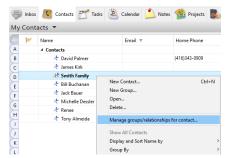
- 2. Fill out the appropriate information for the group contact you are adding (usually the Name will suffice).
- 3. After entering the appropriate information you can now add the contact. You can do this by clicking on **Save and Close** button.

| 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: | |

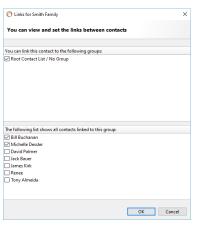
6. To view your new groups make sure that your option Group By and Groups. If this option is not selected you will not be able to view the contacts linked to your groups in the list however you can still see linked contacts in the details pane on the right when clicking on the contact.

| | 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.

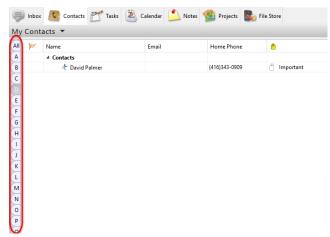
| New Task for Contact |
|------------------------------|
| New Appointment for Contact |
| New Note for Contact |
| New Project Task for Contact |
| |

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

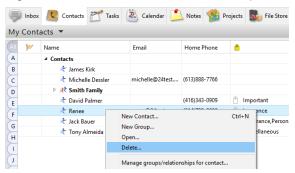
To view a contact's detail information without having to edit the contact simply click once on the contact's name on the main screen. Information pertinent to that selected contact will be shown on the **Contact Detail** screen (the location of this screen is dependent on your **Detail Pane Location** 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 | | | | | |
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| K | | | | Show All Contacts | | | | | |
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| 0 | | | | Call Contact | First La | st (Nickname) | | | |
| P | | | | Call Contact | | | | Display | Name |
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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.

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| 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.

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| bnt ⊭ | Name | Email | Home Phone | • | | Birthday Date | Work Phone | |
| | ✓ Contacts ★ James Kirk ★ Michelle Dessler ★ Smith Family | michelle@24test | (613)888-7766 | | | 1-Oct-1977 | (613)787-4545 | |
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| | | 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

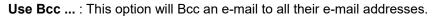
Once you have added contacts to your contact list you are able to send them e-mails directly from UVC. To do this you must have your e-mail account already setup and configured in UVC. You are able to send e-mails to multiple contacts or Cc/Bcc contacts directly out of UVC.

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 | | | | - | | × |
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| General | Home Busine | ss Personal/Mobile Other Journal Activities Misc. Contact Information KYC Info | | | | | |
| た | Title | Other ~ | File under: | Personal ~ | | | |
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| | 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 | | | | | - | | × |
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| | 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 | | | | |
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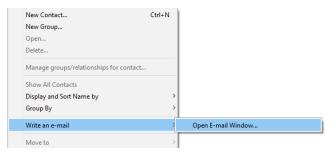
Note: If no **Primary** e-mail address was selected for a contact it will automatically use the first e-mail from the list beginning with a valid e-mail address.

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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| 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.

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- 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.

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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 * | | | |
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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.

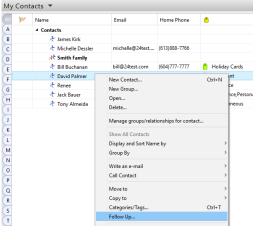
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Follow Up

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

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| You can view and set a | a follow up for thi | is entry | |
| Follow up date: | | ٤ | Show Time |
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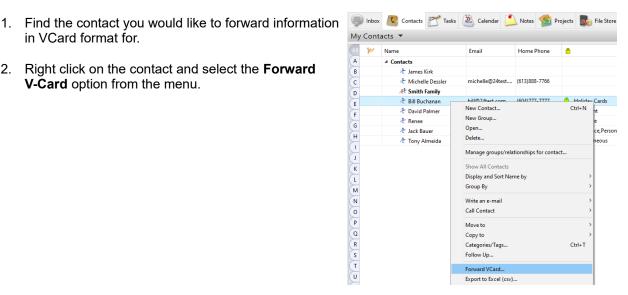
- 6. If you would like to set a reminder click on the **Set Reminder** button.
 - a) Click on the Date/Time Alert button.
 - b) Enter the time you would like the alert.
 - c) Select where you would like the alert to go by placing a check mark beside the appropriate option.
 - d) If you have selected 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.

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| F | | 🖈 David Palme | er . | | (416)343-0909 | ٢ | Important |
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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

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- 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

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|-------------|-------------------|-----------------|-----------|-------------|-------|-----------|------|--------------|
| 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

| | 🖉 Contacts | × |
|-----|---|---|
| | My Contacts V Quick Search Q All Active V | |
| | Select Contacts | |
| | Tag all Untag all | |
| 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.

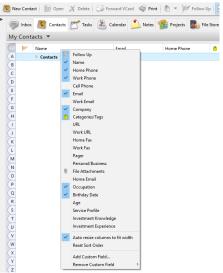
Column Headings

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

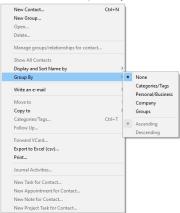
To sort your columns ascending or descending use the following steps:

- 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.

