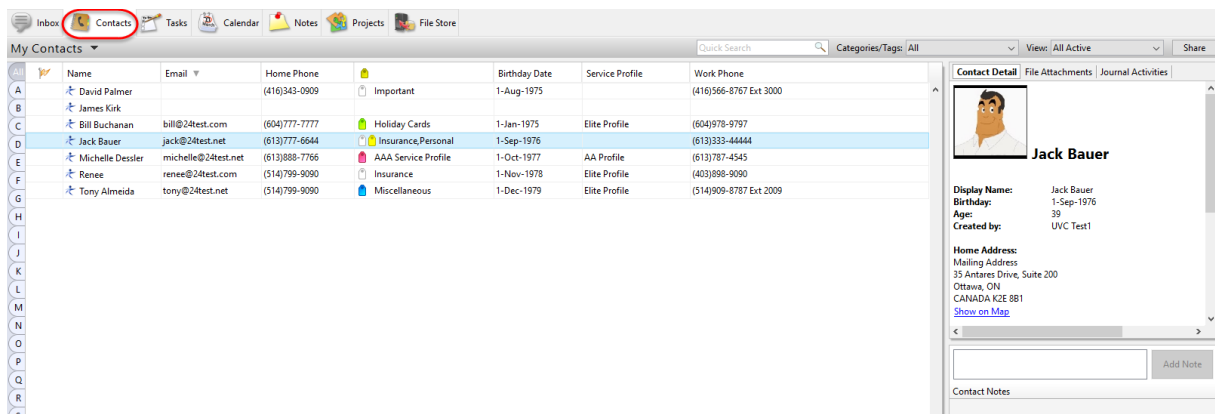


Contacts Module

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.

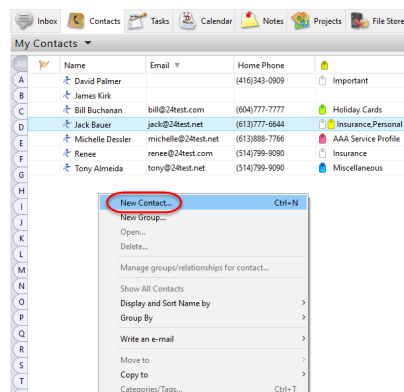
To access the **Contacts Module** from the Tab view simply click on the Contacts Module tab, if you are in the Special view simply click on the large Contacts Module button on the left.



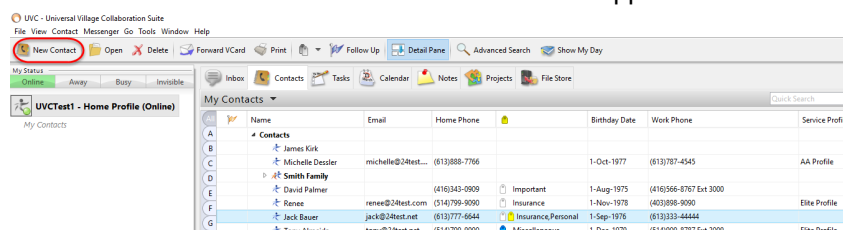
To Add a New Contact

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

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



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



- 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.

*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)***

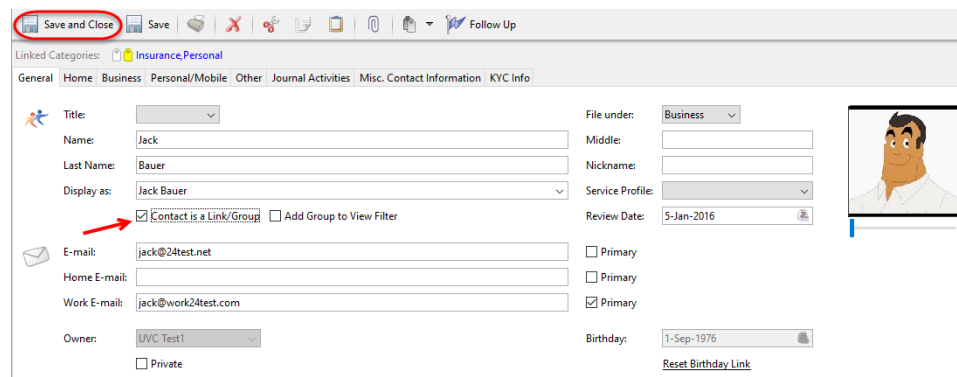
The **Home** tab is where you can enter the contact's home address information and phone numbers.

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

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

Contact is a Link/Group

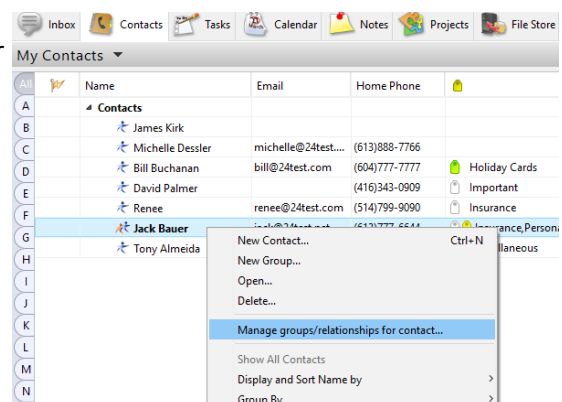
This option should be checked if the contact being added is intended to be a parent contact that other contacts can link to. For instance, if you would like to link members of the same family together, you can set one of the family members as a Group/Link and then link the other members of the family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



3. After entering the appropriate information you can now add the contact. You can do this by clicking on **Save and Close** button.

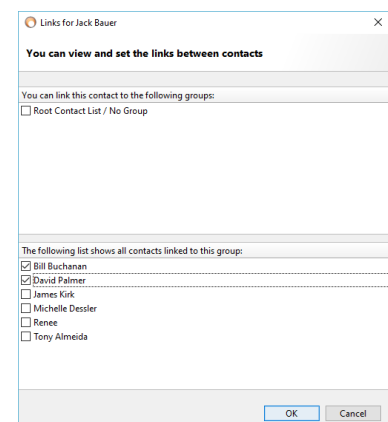
4. If this contact is an individual you are **done** adding your contact.

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...**



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.

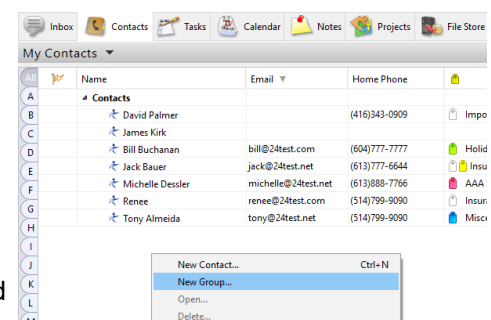


To Add a New Group Contact

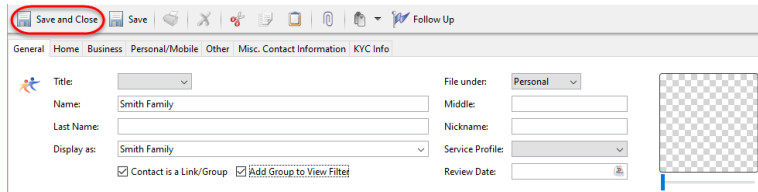
A group contact is a contact that you can link other contacts to and is the same as selecting "Contact is a Link/Group" for a client. For instance, if you wanted to enter the Smith Family on UVC you could create “Smith Family” as a group contact and then link all other members of the family to it.

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

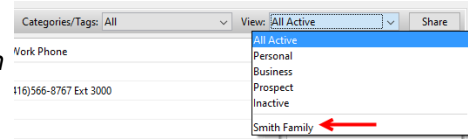
1. Right click anywhere in the white area of the address book and select **New Group** from the menu.



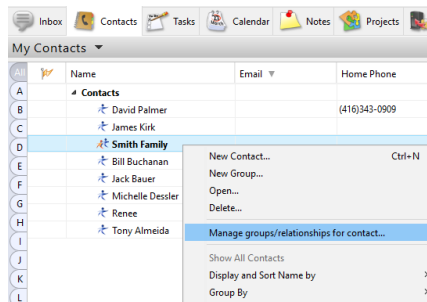
- Fill out the appropriate information for the group contact you are adding (usually the Name will suffice).
- After entering the appropriate information you can now add the contact. You can do this by clicking on **Save and Close** button.



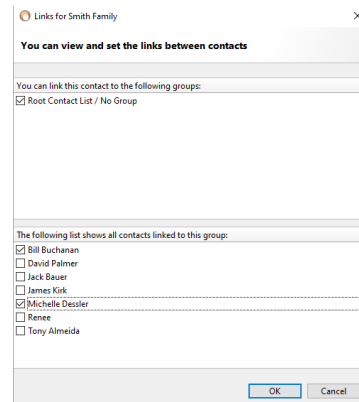
*Note: The option **Add Group to View Filter** will allow this new group to be filtered using the drop **View** down menu located on the upper right corner of the **Contacts Module**.*



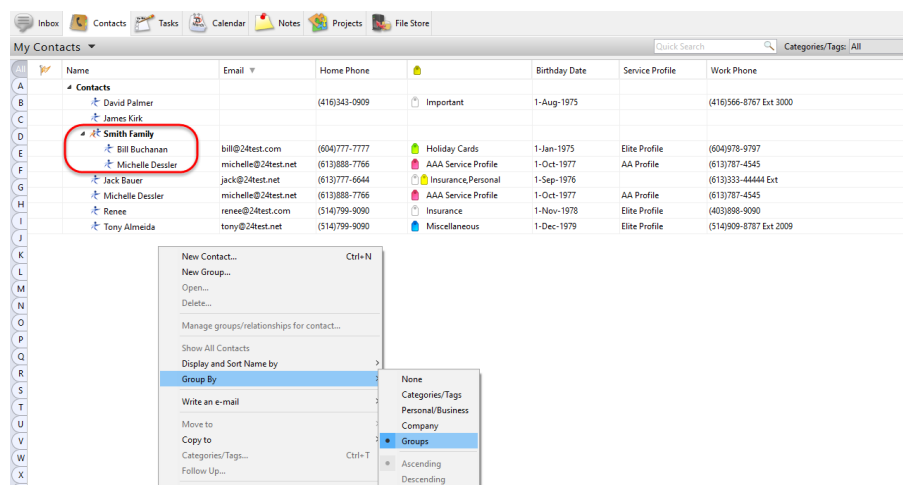
- Right click on the new “contact link/group” you created and select the option **Manage groups/relationships for contact...**



- 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.



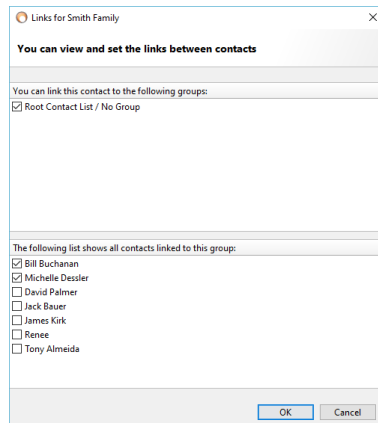
- To view your new groups make sure that your option **Group By and Groups**. If this option is not selected you will not be able to view the contacts linked to your groups in the list however you can still see linked contacts in the details pane on the right when clicking on the contact.



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.



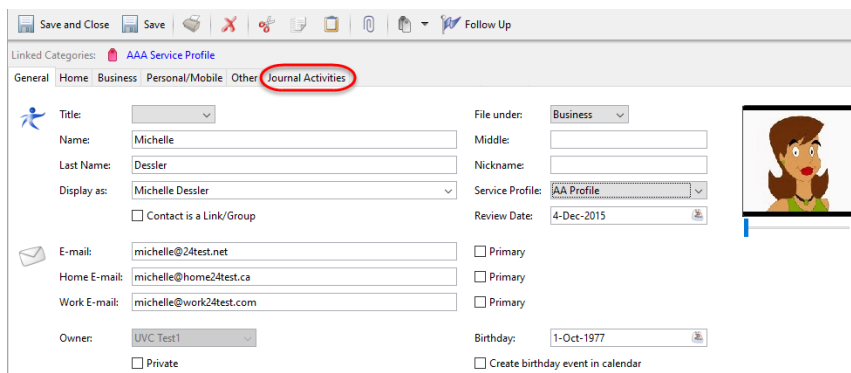
3. In the bottom part of the window that appears you will see a list of all your address book contacts. Find the contacts that you would like to remove from being linked under this parent contact and remove the check mark in the Link column.
4. Click on **OK** to save your changes.

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.

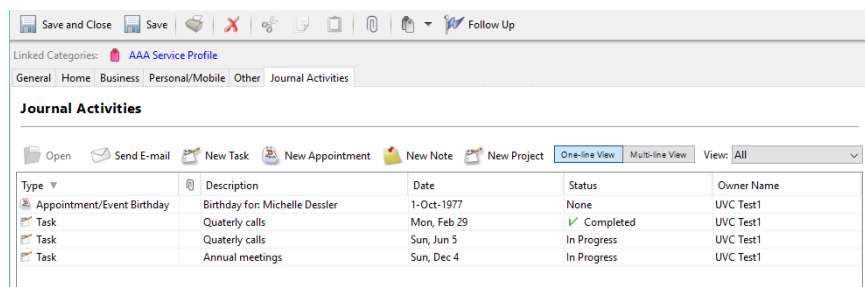
To access the journal activities for a contact use the following steps:

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

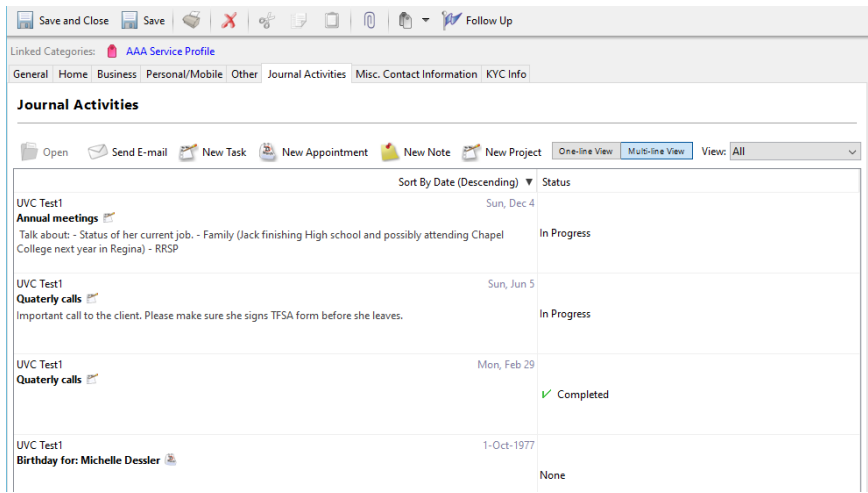


3. Click on the **Journal Activities** tab along the top of the screen. If you do not see a journal activities tab it is because there have been no activities linked to that contact.

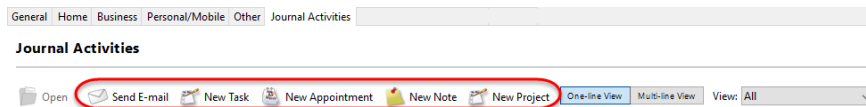
The **One-Line View** will show you the e-mails, tasks, appointments and notes information in a single line view.



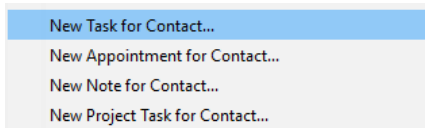
The **Multi-line View** will show you more content of the selected e-mails, tasks, appointments and notes information.



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

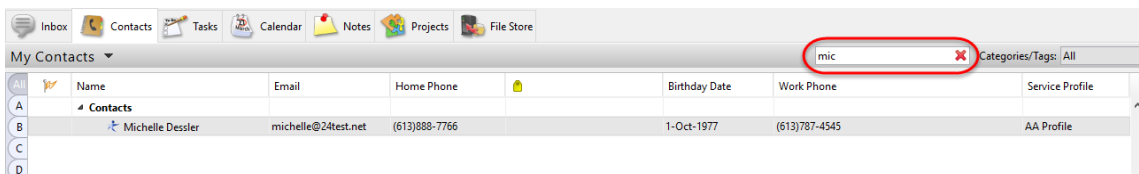


You can also create new e-mails, tasks, appointments and notes which will be directly linked to the selected contact by right clicking on the selected contact and then choosing the appropriate new action.

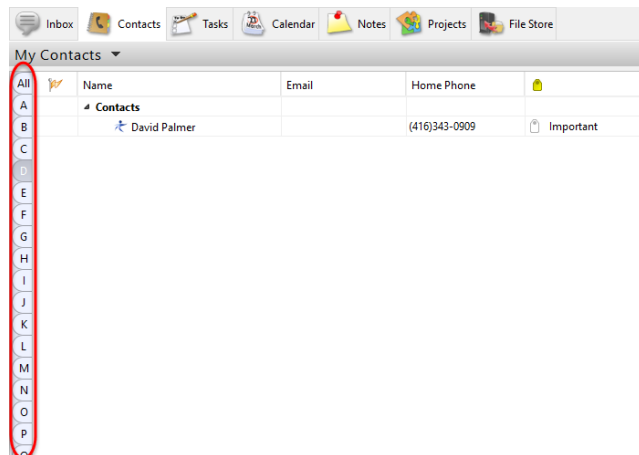


To Find a Contact

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.



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.



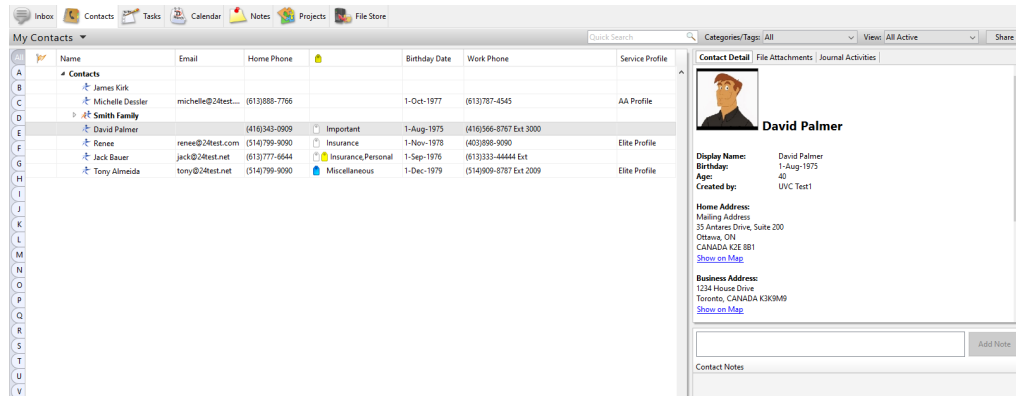
To View/Edit an Existing Contact

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

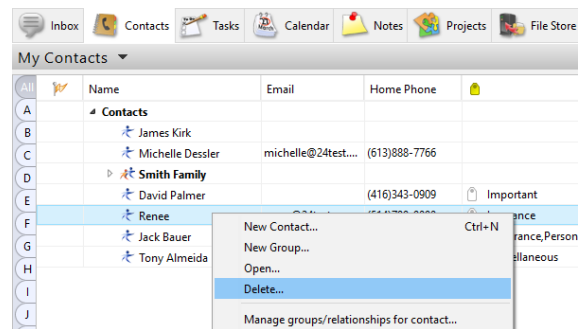
To view a contact's detail information without having to edit the contact simply click once on the contact's name on the main screen. Information pertinent to that selected contact will be shown on the **Contact Detail** screen (the location of this screen is dependant on your **Detail Pane Location**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



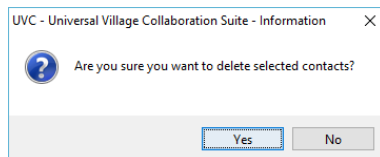
To Delete a Contact

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.

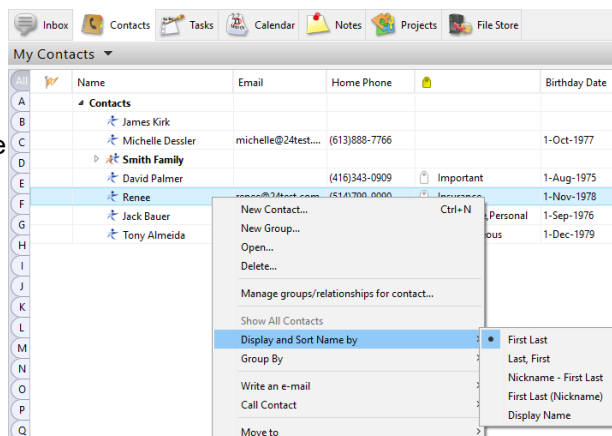
Warning: Please exercise caution when deleting contacts. The action cannot be reversed.

Display and Sort Name By

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

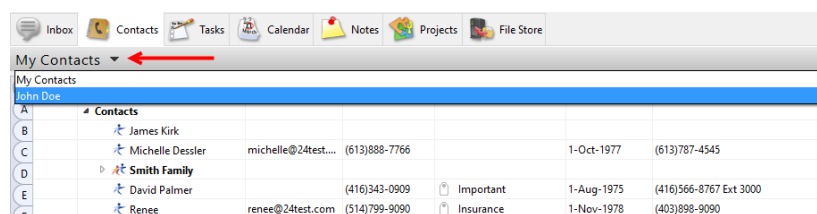
To change how your contacts are listed please use the following steps:

1. 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.



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.

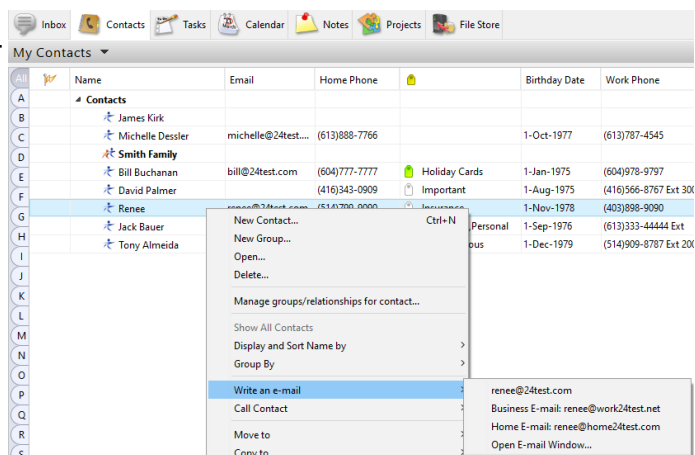


To e-mail a Single Contact

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.

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

1. Find the contact you would like to send the e-mail to.
2. Click once on the contact
3. Right click and select the option **Write an e-mail**.
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.



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.

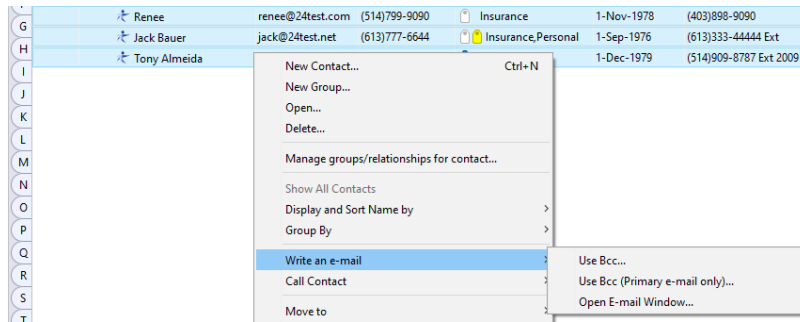
To e-mail Multiple Contacts

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.

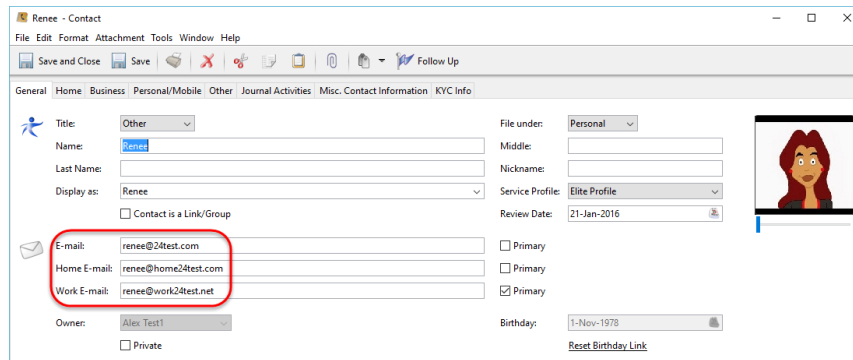
To send an e-mail to multiple contacts please use the following steps:

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.

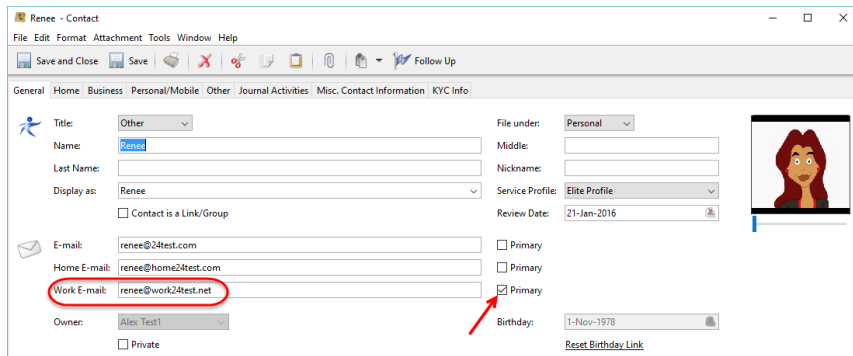
You will have 3 different options at your disposal:



Use Bcc ... : This option will Bcc an e-mail to all their e-mail addresses.

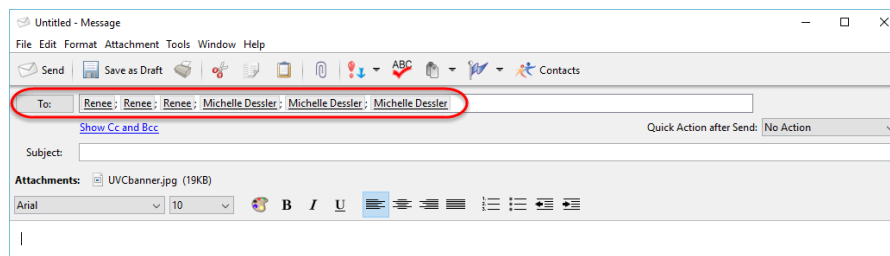


Use Bcc (Primary e-mail only) ... : by default this option will Bcc an e-mail to all selected contacts and their **Primary** e-mail address only (identified by a check box).



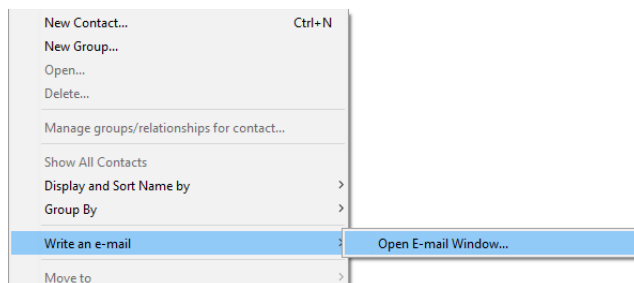
Note: If no **Primary** e-mail address was selected for a contact it will automatically use the first e-mail from the list beginning with a valid e-mail address.

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).

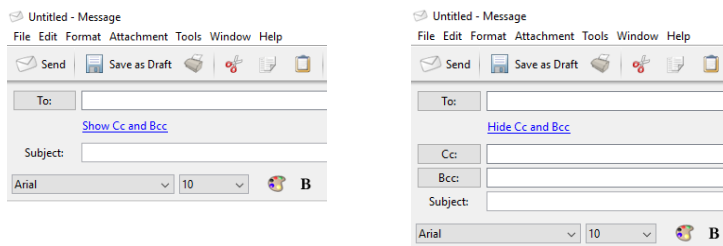


To Cc and/or Bcc and e-mail to contacts please use the following steps:

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**.

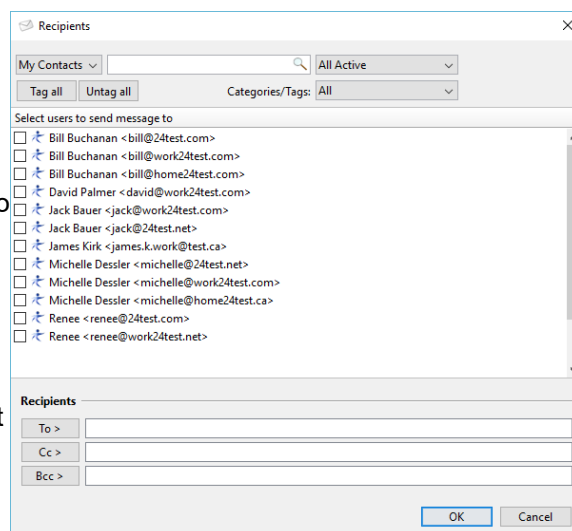


3. A new **Create Message** window will pop-up. You can toggle between **Show/Hide Cc and Bcc** option.



4. Click on either the To or Cc or Bcc field to add your contact.
5. A list of all your contacts will 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.



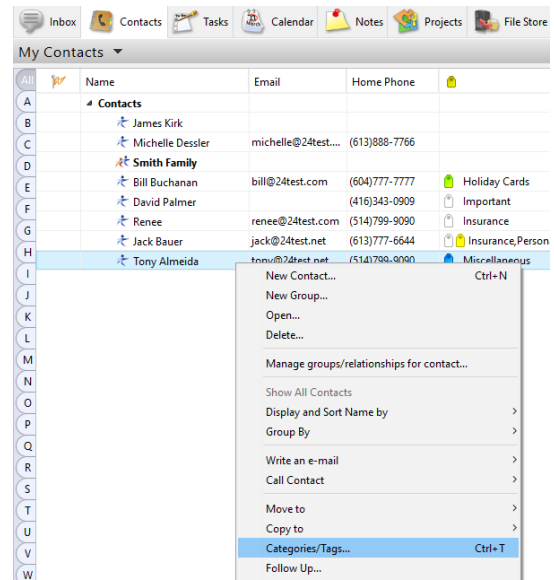
Once you have moved the contacts to the appropriate recipient boxes that you would like to send your e-mail to simply click on **OK** button. You will be brought back to the Create Message window where you will be able to write and send an e-mail.

Categories

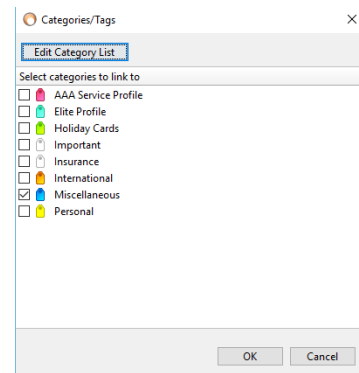
You are able to sort contacts into categories to make groups of contacts. This can be useful when searching for contacts, printing information for contacts or displaying contacts because these can all be done by category. If you would like to group contacts by categories you must first setup your categories. 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:

1. Find the contact you would like to assign a category/tag to.
2. Right click on the contact and select the **Categories/Tags** option from the menu.



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.

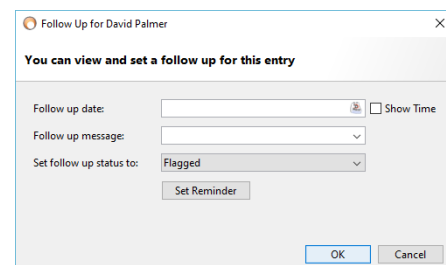
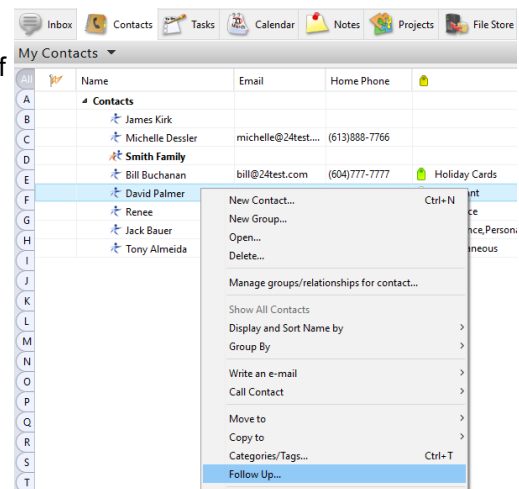


Follow Up

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.



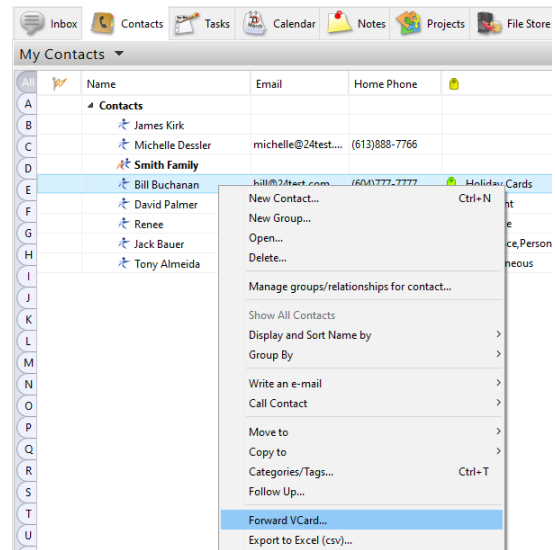
6. If you would like to set a reminder click on the **Set Reminder** button.
 - a) Click on the Date/Time Alert button.
 - b) Enter the time you would like the alert.
 - c) Select where you would like the alert to go by placing a check mark beside the appropriate option.
 - d) If you have selected e-mail 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:

1. Find the contact you would like to forward information 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.

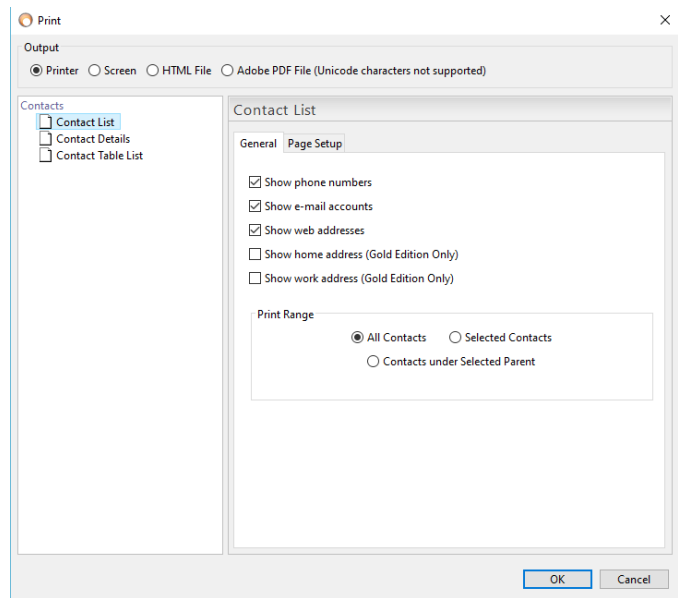
4. Once you have moved the contacts to the appropriate recipient boxes that you would like to send your Vcard information simply click on OK button. You will be brought back to the Create message window where you will be able to write and send an e-mail.

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:

1. 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.

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.

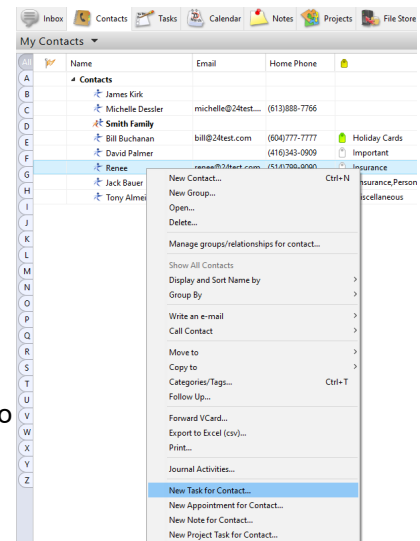
5. Select the type of Output you would like to use from the top of the screen. You are able to choose **Screen**-shows you a print preview, **Printer**-prints to paper, **HTML File**-creates and **Adobe PDF File**-creates a PDF file.
6. Click on **OK** button.

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.



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

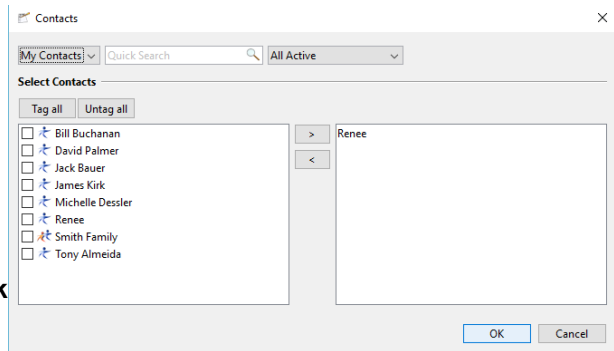
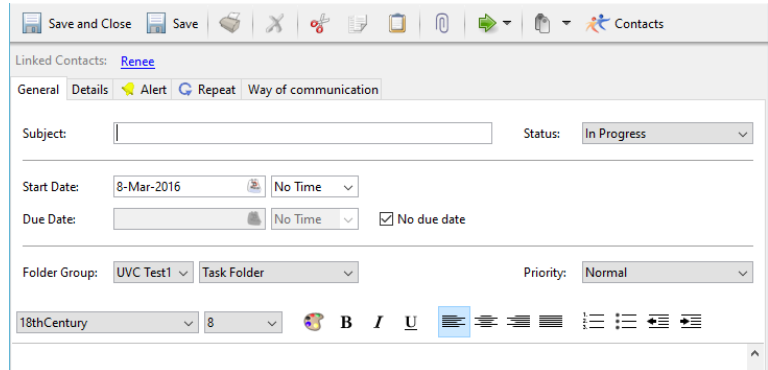
1. Find one of the contacts you would like to enter the task for.
2. Right click on the contact and select **New Task for Contact** from the menu.

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 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 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:

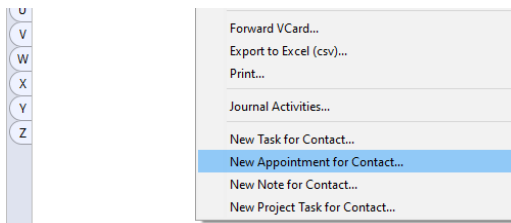
1. Find the contact you would like to enter an appointment for.

2. Right click on the contact and select **New Appointment for Contact** from the menu.

3. Enter the Appointment details.

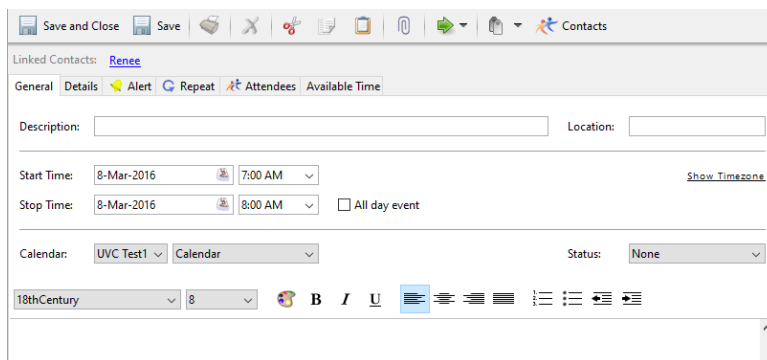
4. Click on the Save and Close button.

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.

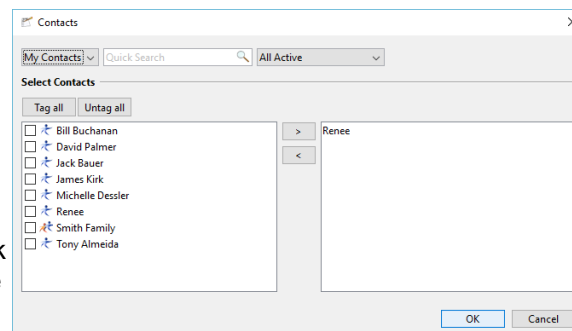


To add a new appointment for multiple contacts please use the following steps:

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 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.



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.

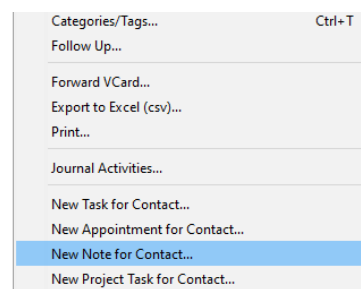
5. Once you have moved the contacts to the boxes on the right that you would like to enter the appointment for simply click on **OK** button.
6. Click on the **Save and Close** button.
7. If you double click on any of the contacts you have just entered the appointment for from the **Contacts Module** 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.

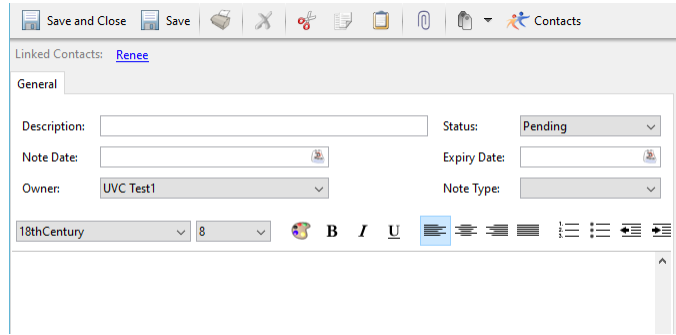
To Add a Note for a Contact To add a new note for a contact please use the following steps:

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.
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.

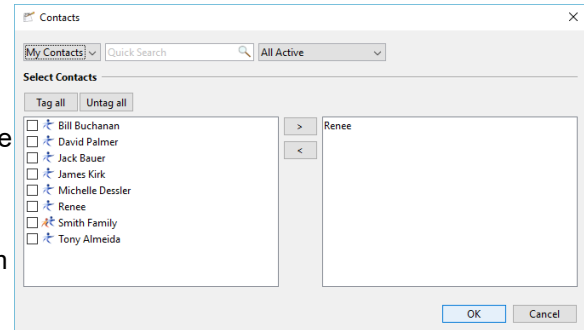


To add a new note for multiple contacts please use the following steps:

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.
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 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.



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 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.

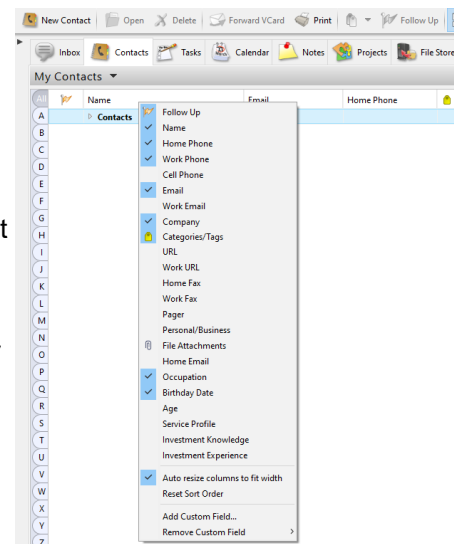
Column Headings

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.
2. 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  the symbol allows you to 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

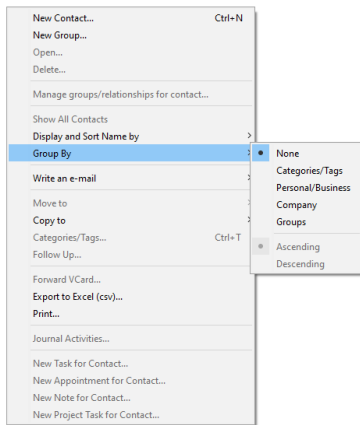
To sort your columns ascending or descending use the following steps:

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:



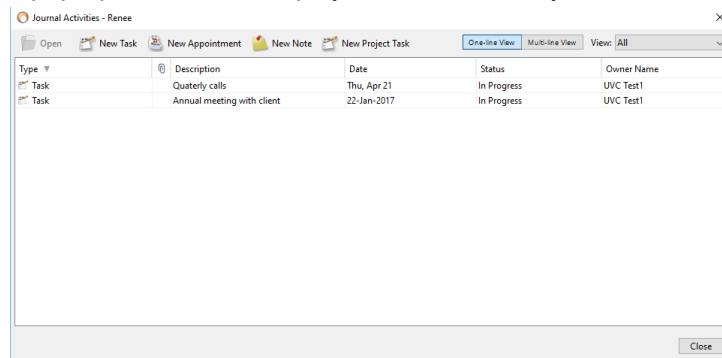
Journal Activities

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 information 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.



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 information sheet such as name, address or phone number.

D. This area shows the column headers which can be customized to your 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 information card will appear in this section when the contact is selected.

The screenshot displays the 'My Contacts' screen in the Universal Village Collaboration Suite. The interface includes a menu bar with options like 'New Contact', 'Open', 'Delete', 'Forward VCard', 'Print', 'Follow Up', 'Detail Plans', 'Advanced Search', and 'Show My Day'. Below the menu is a toolbar with icons for 'Inbox', 'Contacts', 'Tasks', 'Calendar', 'Notes', 'Projects', and 'File Store'. The main area is divided into two sections: a contact list table and a contact detail card.

Contact List Table:

Name	Email	Home Phone	Birthdate	Work Phone	Company	Occupation
James Kirk						
Michelle Desler	michelle@2Rest.net	(613)888-7766	1-Oct-1977	(613)787-4543		
Smith Family						
Bill Buchanan	bill@2Rest.com	(604)777-7777	1-Jan-1975	(604)978-9797		Holiday Cards
David Palmer	(416)343-0909		1-Aug-1975	(416)566-8767 Ext 3000		Important
Renee	renee@2Rest.com	(514)799-9090	1-Nov-1978	(403)898-9090		Insurance
Jack Bauer	jack@2Rest.net	(613)777-6644	1-Sep-1976	(613)333-4444		Insurance, Personal
Tony Almeida	tony@2Rest.net	(514)799-9090	1-Dec-1979	(514)909-8787 Ext 2009		Miscellaneous

Contact Detail Card (Jack Bauer):

- Display Name:** Jack Bauer
- Birthdate:** 1-Sep-1976
- Age:** 39
- Created by:** UVC Test1
- Home Address:** Mailing Address, 33 Antares Drive, Suite 200, Ottawa, ON, CANADA K2E 8B1
- Business Address:** 1234 Spy Avenue, Ottawa, CANADA K3K6M8

Contact Notes:

The notes section is currently empty.