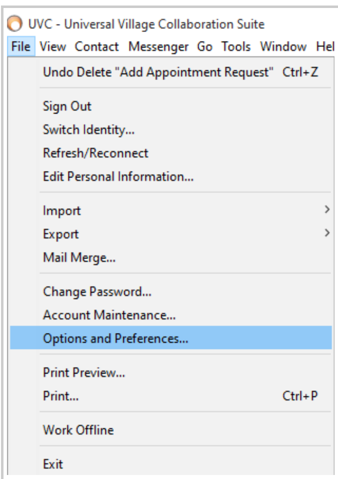
How to create the Misc. Contact Information custom tab/fields

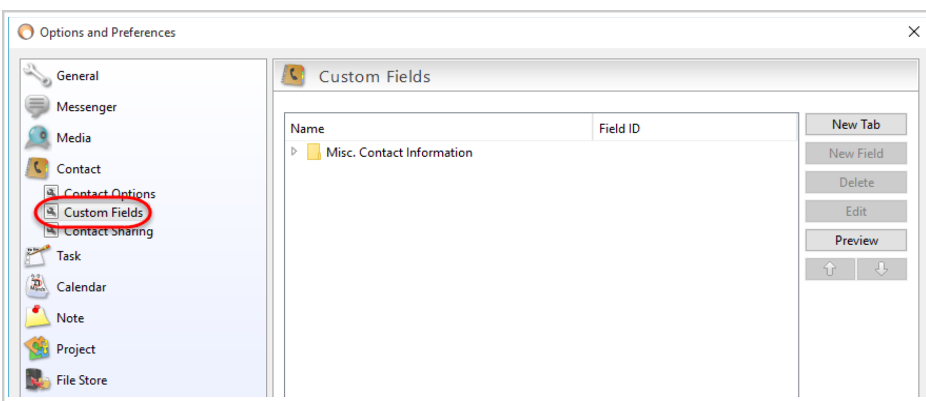
In the **example** below we will explain how to create the **Misc. Contact Information** custom tab template. The following template contains the most common elements based on what we have seen financial advisors implement. Understanding how to create this template can let you explore one of the best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

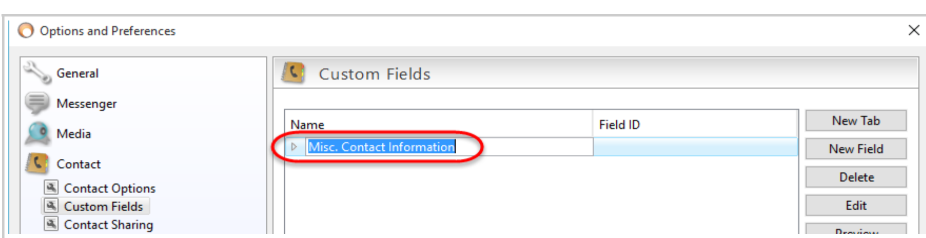
Please note that the tabs\fields you create under your own contact list will be seen by the other users that you are currently sharing your list with. These custom tabs\fields are **user defined** and can only be seen within your contact list. If a different user wants to see the same tabs\fields for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

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



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





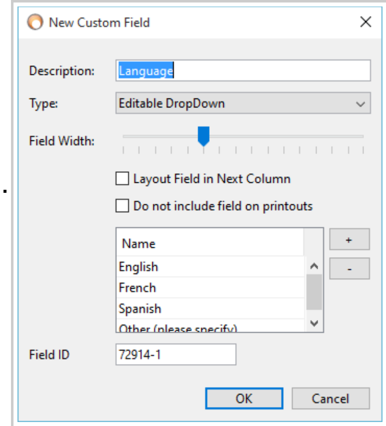
Click on the **Enter** key on your keyboard to save your new tab.

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

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

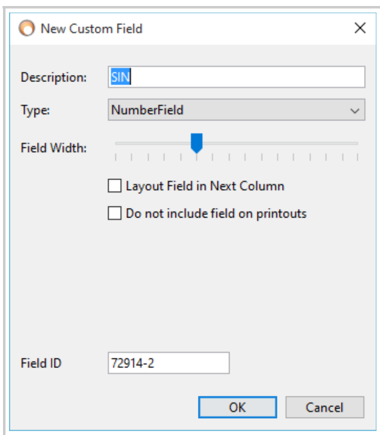
   You will notice that the bottom part where the header Name is shown will be available to edit.
   Click on the **+ symbol** to add a new options to your drop down menu.

   The options you will add are:
   English
   French
   Spanish
   Other (please specify)



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

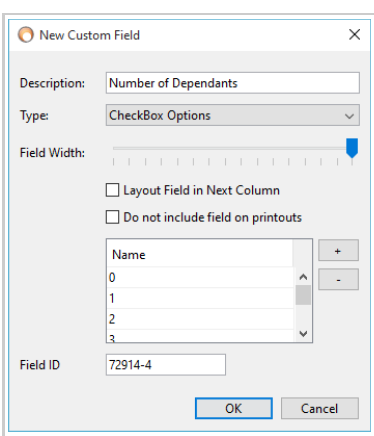
4. Click on the **New Field** button again to add your second field.
   The **Description** will be *SIN*.
   The **Type** will be a *NumberField*.



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

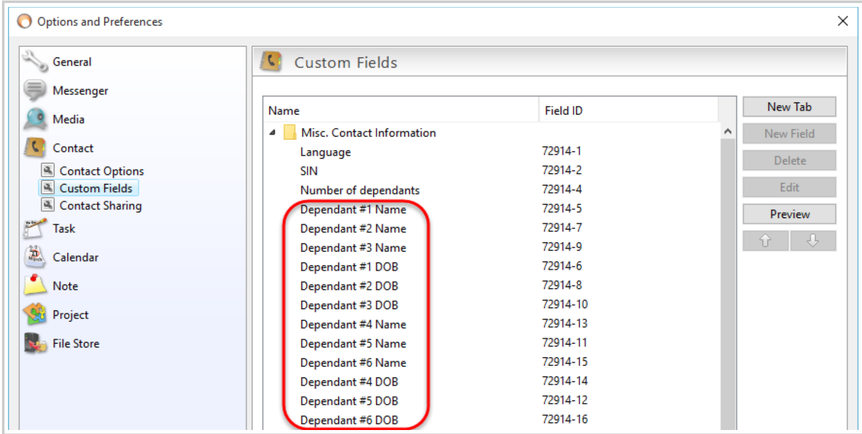
5. Click on the **New Field** button to add your next field.
   The **Description** will be *Number of Dependants*.
   The **Type** will be *CheckBox Options*.

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

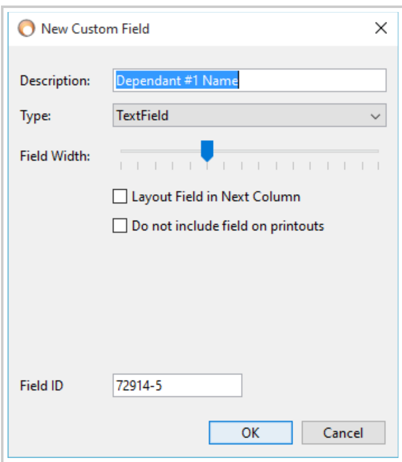


   Click on the **OK** button to save your field.

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



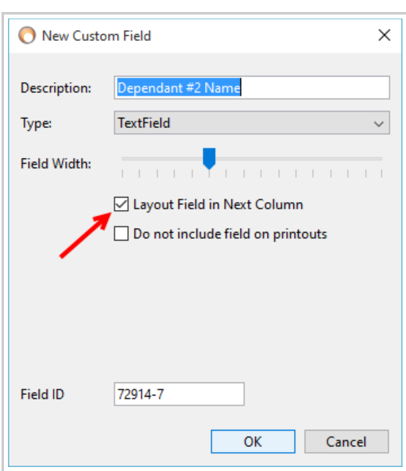
Click on the **New Field** button to add your first dependant name field.
The **Description** will be *Dependant #1 Name*.
The **Type** will be *TextField*.



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

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

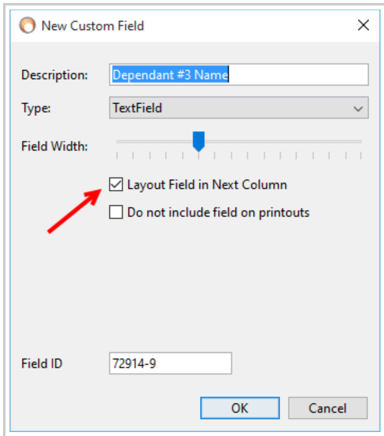
Select the option **Layout Filed in Next Column**. This option will move the field *Dependant #2 Name* to the right of *Dependant #1 Name*.



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

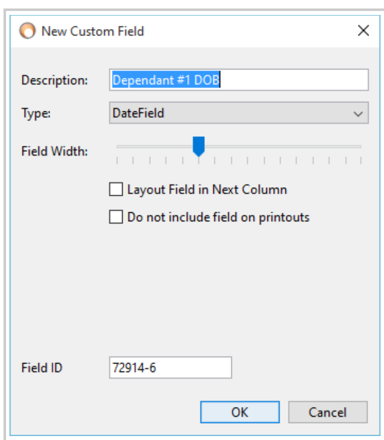
8. Click on the **New Field** button to add your third dependant name field.
The **Description** will be *Dependant #3 Name*.
The **Type** will be *TextField*.

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



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

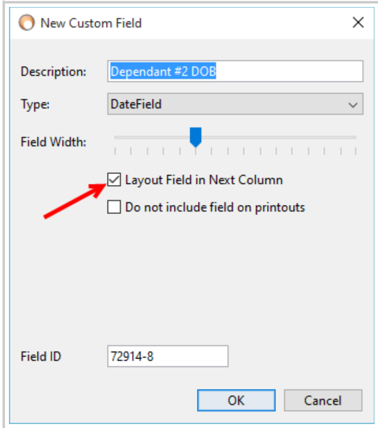
9. Click on the **New Field** button to add your first dependant date of birth field.
The **Description** will be *Dependant #1 DOB*.
The **Type** will be *DateField*.



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

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

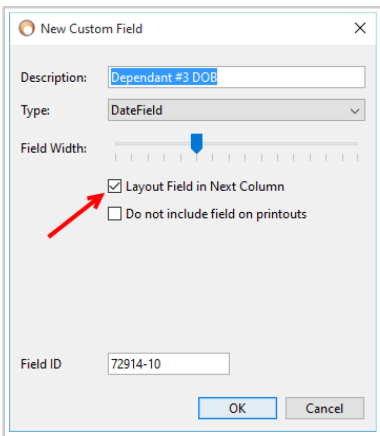
Select the option **Layout Filed in Next Column**. This option will move the field *Dependant #2 DOB* to the right of *Dependant #1 DOB*.



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

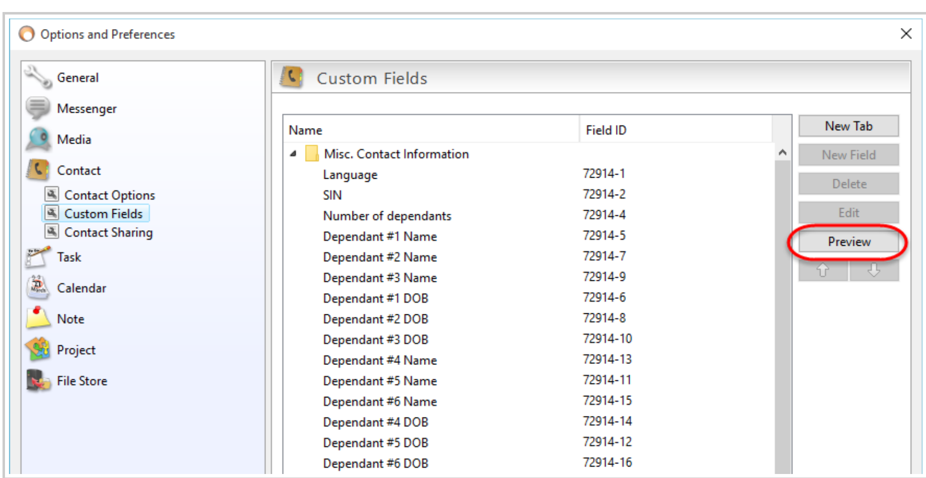
11. Click on the **New Field** button to add your third dependant date of birth field.
 The **Description** will be *Dependant #3 DOB*.
 The **Type** will be *DateField*.

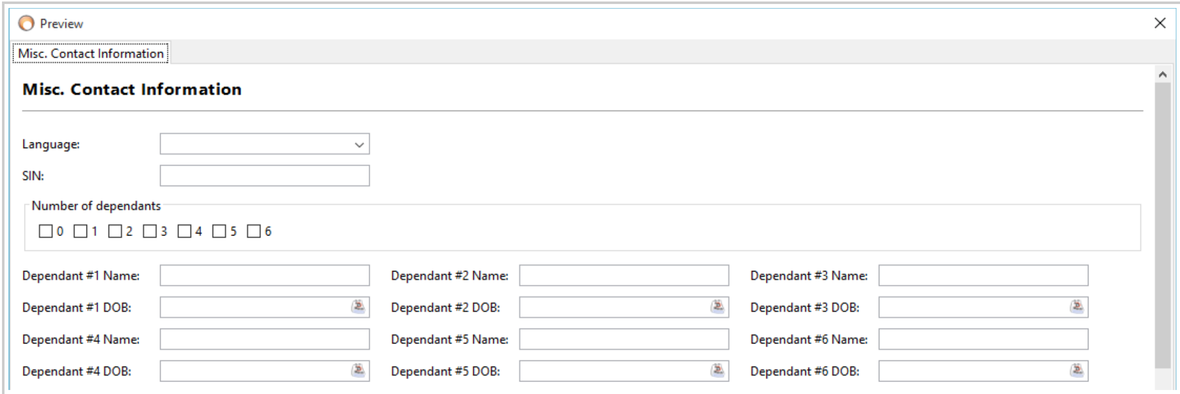
 Select the option **Layout Filed in Next Column**. This option will move the field *Dependant #3 DOB* to the right of *Dependant #2 DOB*.



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

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

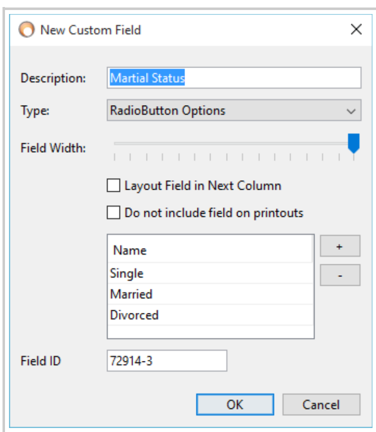




13. Once you have created all your dependants fields you are now ready to add the spousal information.

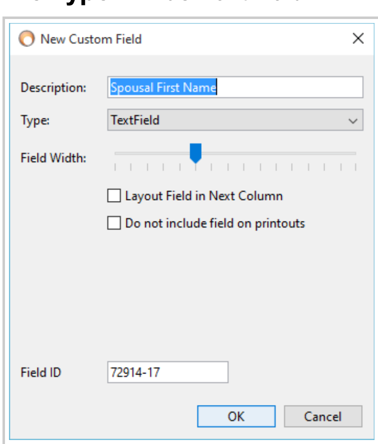
    Click on the **New Field** button to add a new field.
    The **Description** will be *Martial Status*.
    The **Type** will be *RadioButton Options*.

    Again you will notice that the bottom part where the header Name is shown will be available to edit.
    Click on the **+ symbol** to add a new choice to your radio button choices.
    The options you will add are:
    Single
    Married
    Divorced



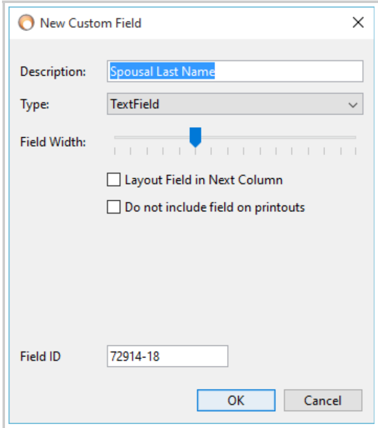
Click on the **OK** button to save your field.

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



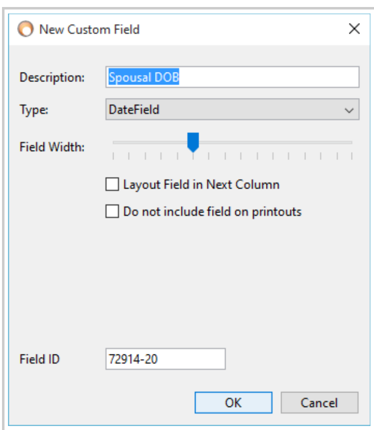
Click on the **OK** button to save your field.

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



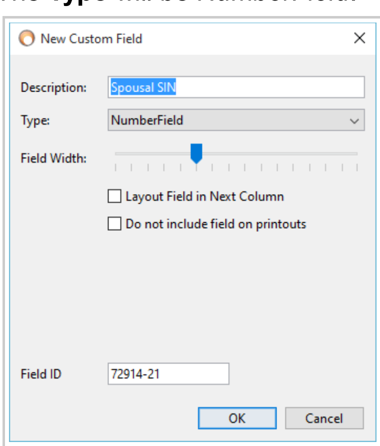
Click on the **OK** button to save your field.

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



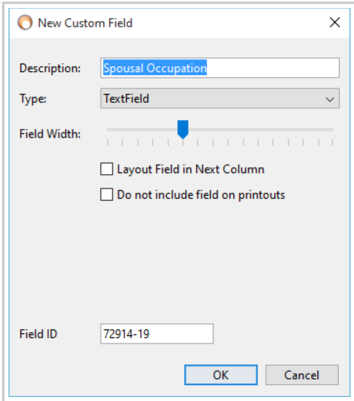
Click on the **OK** button to save your field.

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



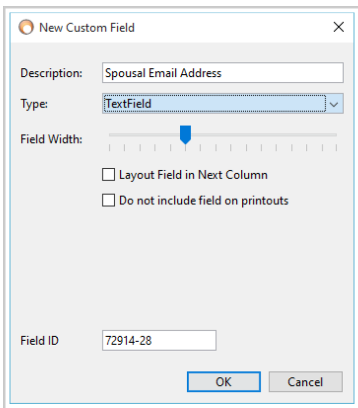
Click on the **OK** button to save your field.

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



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

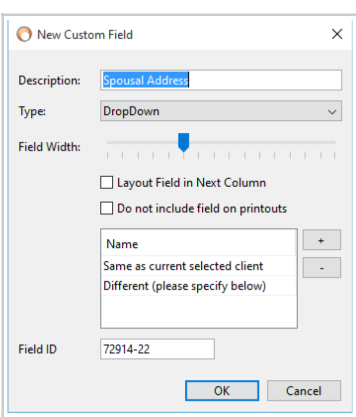
19. Click on the **New Field** button to add a new field.
The **Description** will be *Spousal Email Address*.
The **Type** will be *TextField*.



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

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

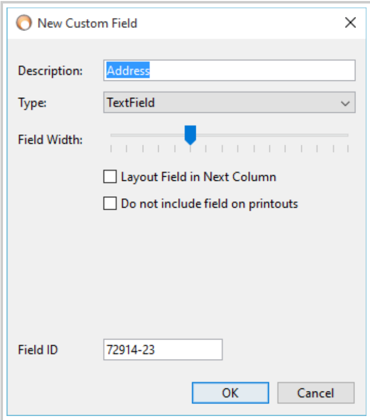
Again you will notice that the bottom part where the header Name is shown will be available to edit.
Click on the **+ symbol** to add a new options to your drop down menu.
The options you will add are:
Same as current selected client
Different (please specify below)

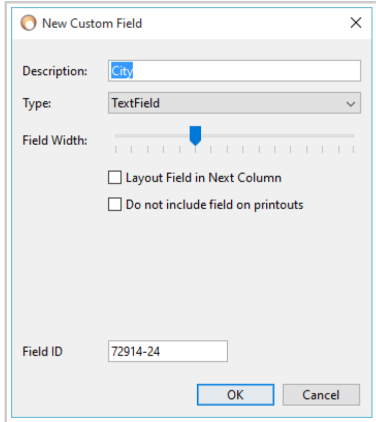


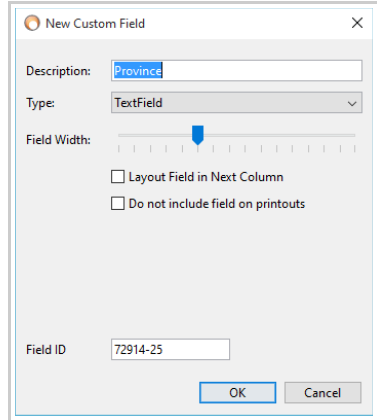
Click on the **OK** button to save your field.

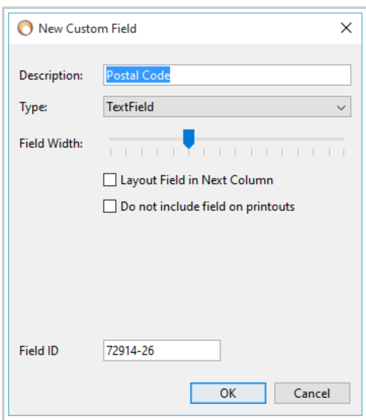
21. Click on the **New Field** button to add a the following 5 fields in this following order: Address, City, Province, Postal Code and Country.

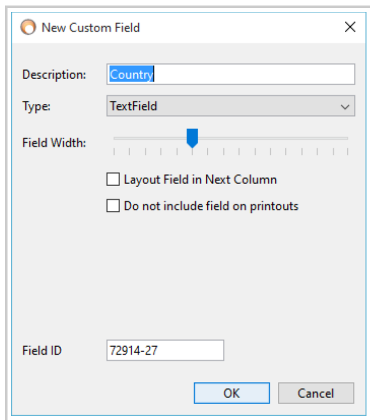
    Please note the **Description** and the **Type** for each of them. The same procedure is applied when creating these new fields.



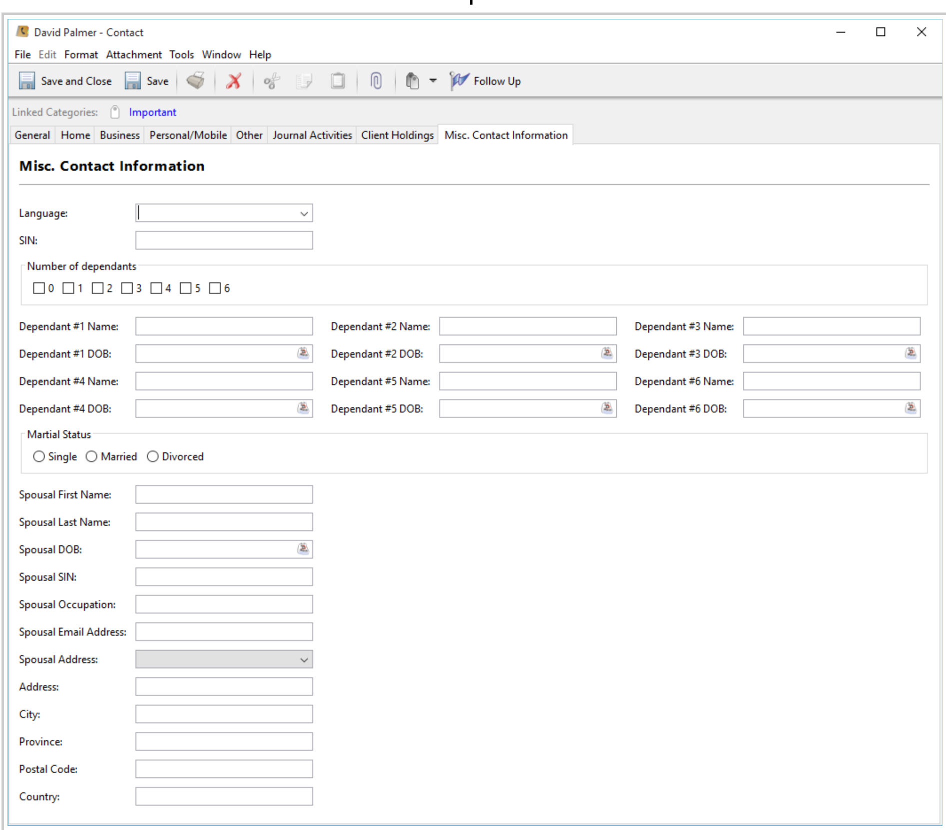








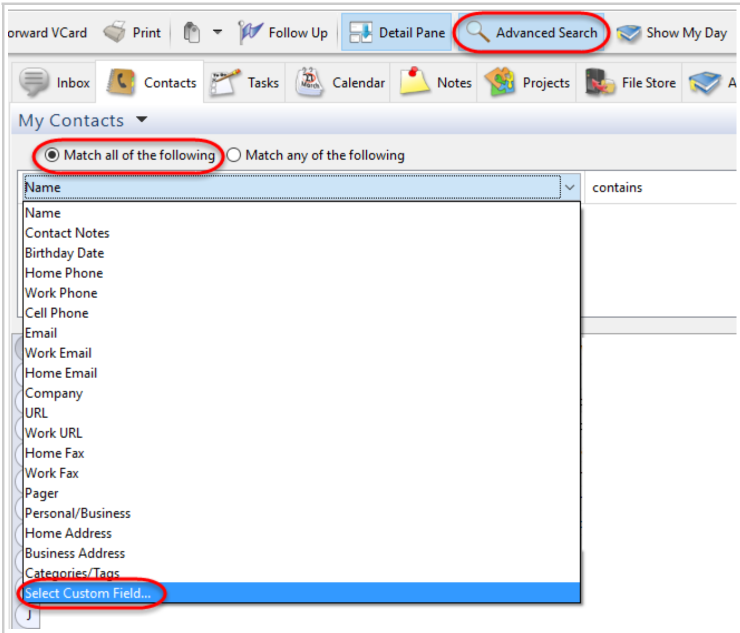
22. Your final *Misc. Contact Information* template should look like this:



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

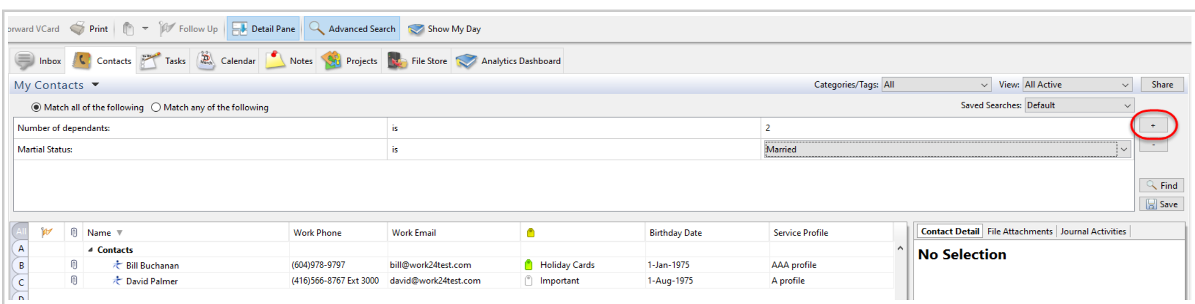
For example I want to search for all married contacts that have number of dependants of 2.

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



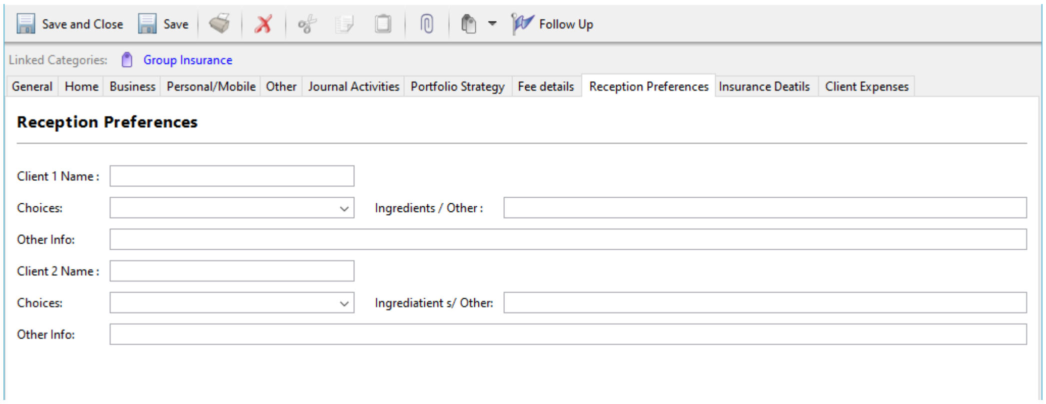
By adding the custom fields *Number of Dependants* **IS** 2 and *Martial Status* **IS** Married the system will search for all your contacts matching all these 2 criteria.

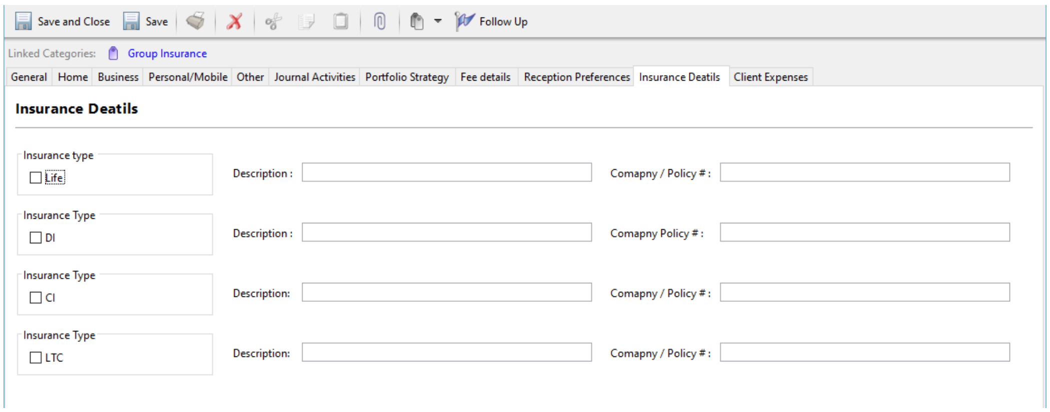
The add a new filter to your advance search click on the + symbol.

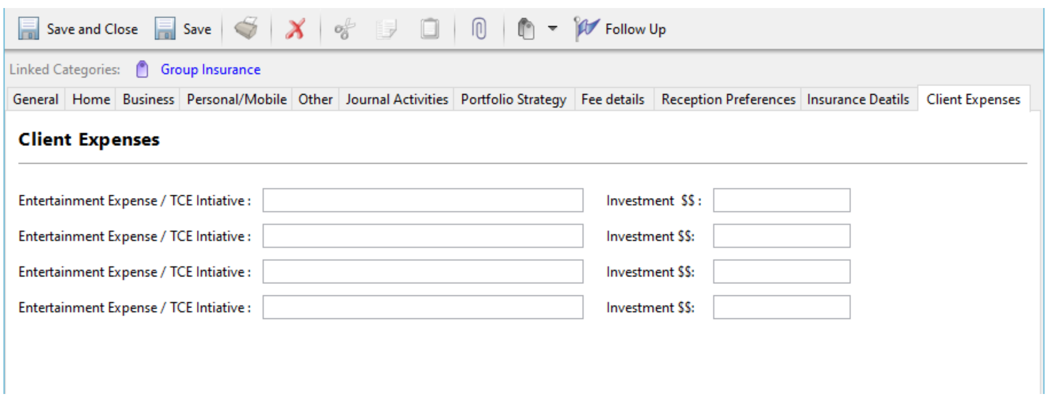


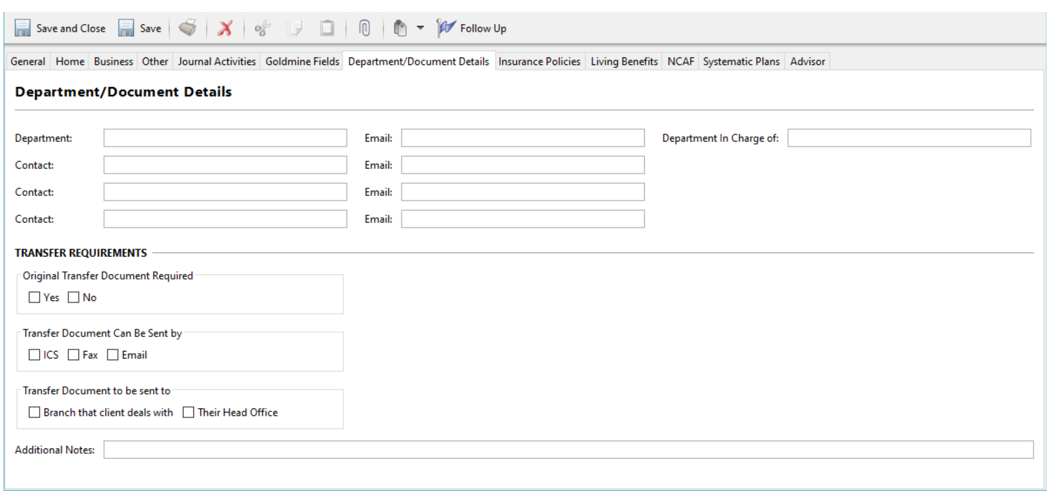
Any type of custom fields you add to your custom tab can be filtered under the respective window you created these fields (in this case we created the **Misc. Contact Information** tab and fields under Contacts).

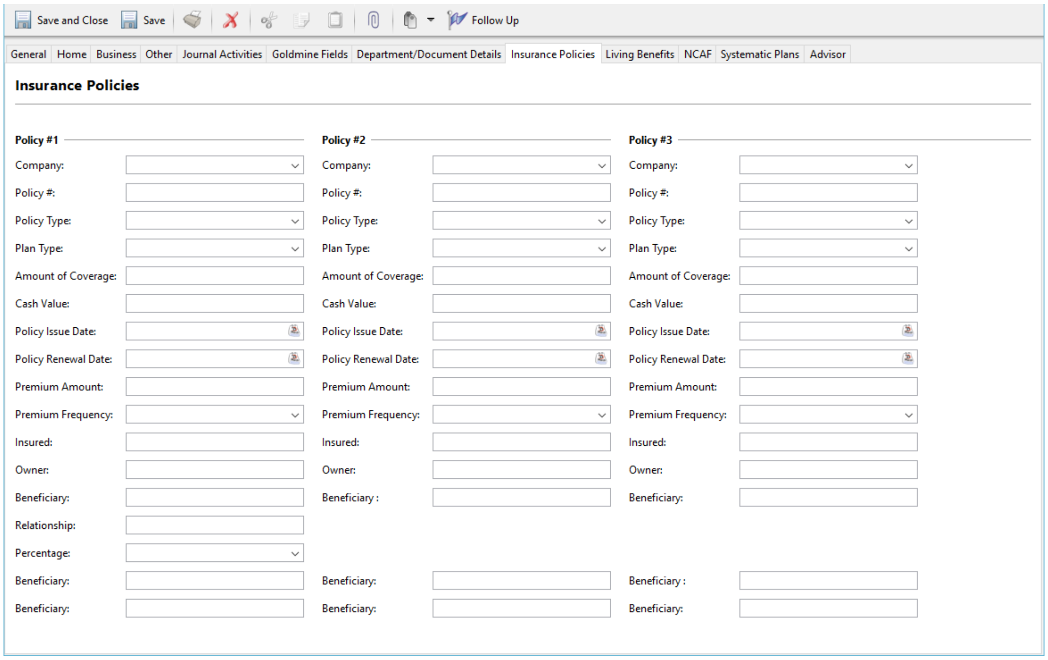
Examples of custom tabs/fields you can create










Save and Close
Save
Follow Up
General
Home
Business
Other
Journal Activities
Goldmine Fields
Department/Document Details
Insurance Policies
Living Benefits
NCAF
Systematic Plans
Advisor
Insurance Policies
Policy #1
Company:
Policy #:
Policy Type:
Plan Type:
Amount of Coverage:
Cash Value:
Policy Issue Date:
Policy Renewal Date:
Premium Amount:
Premium Frequency:
Insured:
Owner:
Beneficiary:
Relationship:
Percentage:
Beneficiary:
Beneficiary:
Policy #2
Company:
Policy #:
Policy Type:
Plan Type:
Amount of Coverage:
Cash Value:
Policy Issue Date:
Policy Renewal Date:
Premium Amount:
Premium Frequency:
Insured:
Owner:
Beneficiary :
Beneficiary:
Beneficiary:
Policy #3
Company:
Policy #:
Policy Type:
Plan Type:
Amount of Coverage:
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Premium Frequency:
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Owner:
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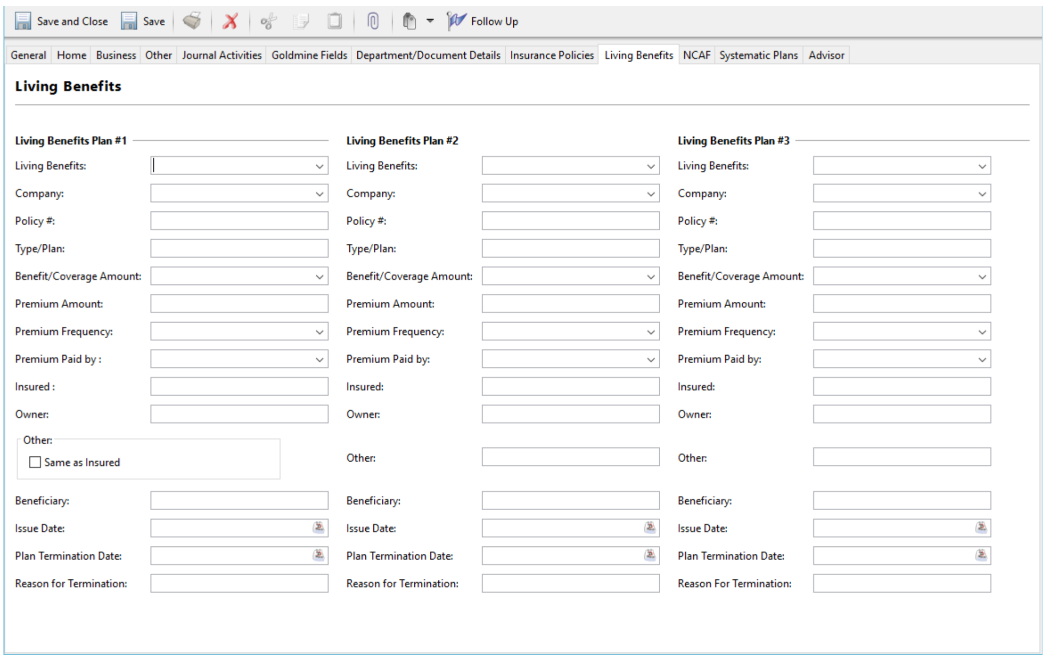
Beneficiary: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General
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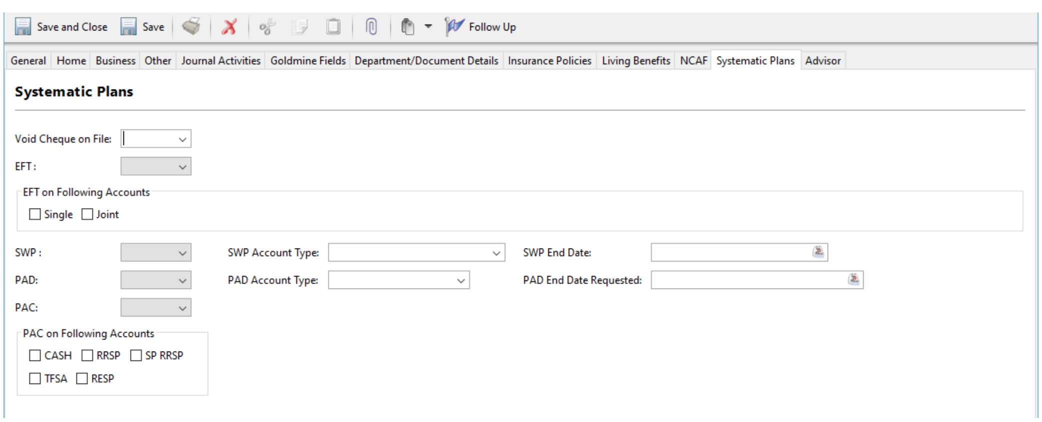
Business
Other
Journal Activities
Goldmine Fields
Department/Document Details
Insurance Policies
Living Benefits
NCAF
Systematic Plans
Advisor
Living Benefits
Living Benefits Plan #1
Living Benefits:
Company:
Policy #:
Type/Plan:
Benefit/Coverage Amount:
Premium Amount:
Premium Frequency:
Premium Paid by :
Insured :
Owner:
Other:
Same as Insured
Beneficiary:
Issue Date:
Plan Termination Date:
Reason for Termination:
Living Benefits Plan #2
Living Benefits:
Company:
Policy #:
Type/Plan:
Benefit/Coverage Amount:
Premium Amount:
Premium Frequency:
Premium Paid by:
Insured:
Owner:
Other:
Beneficiary:
Issue Date:
Plan Termination Date:
Reason for Termination:
Living Benefits Plan #3
Living Benefits:
Company:
Policy #:
Type/Plan:
Benefit/Coverage Amount:
Premium Amount:
Premium Frequency:
Premium Paid by:
Insured:
Owner:
Other:
Beneficiary:
Issue Date:
Plan Termination Date:
Reason For Termination:


Save and Close
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Follow Up
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Goldmine Fields
Department/Document Details
Insurance Policies
Living Benefits
NCAF
Systematic Plans
Advisor
Systematic Plans
Void Cheque on File:
EFT :
EFT on Following Accounts
Single
Joint
SWP :
SWP Account Type:
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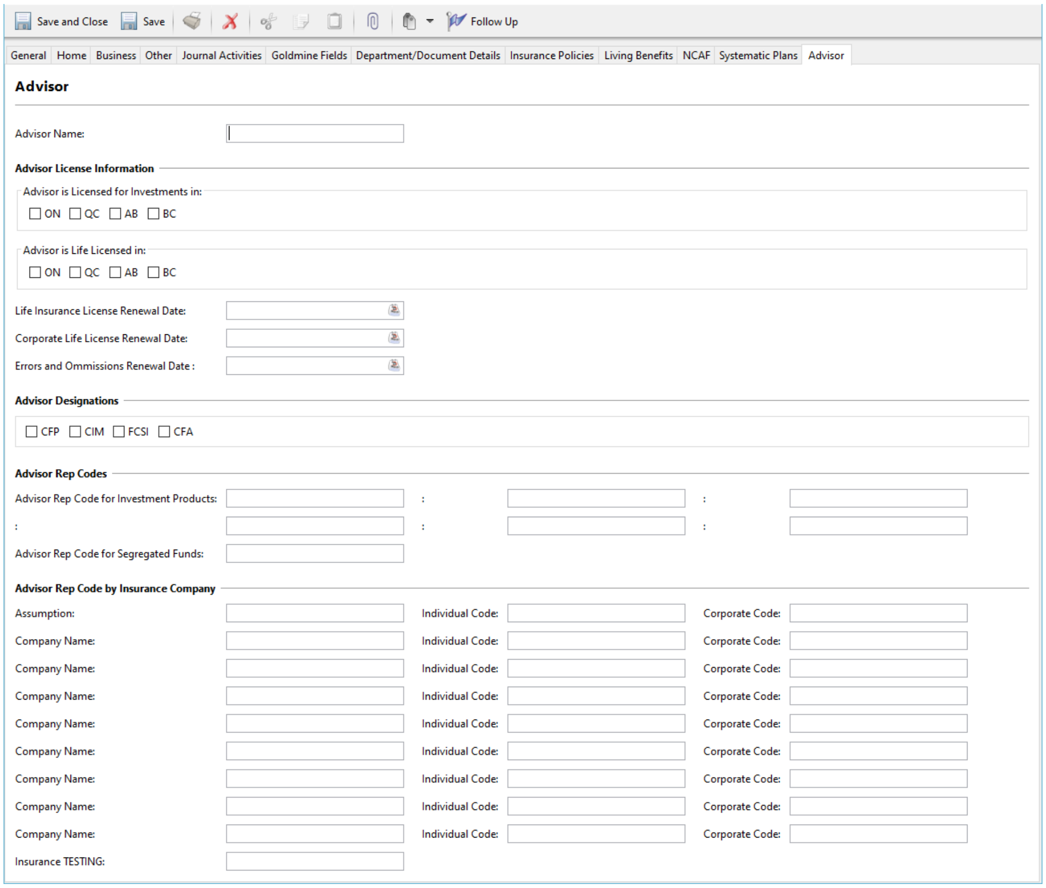
RRSP
SP RRSP
TFSA
RESP


Save and Close
Save
Follow Up
General
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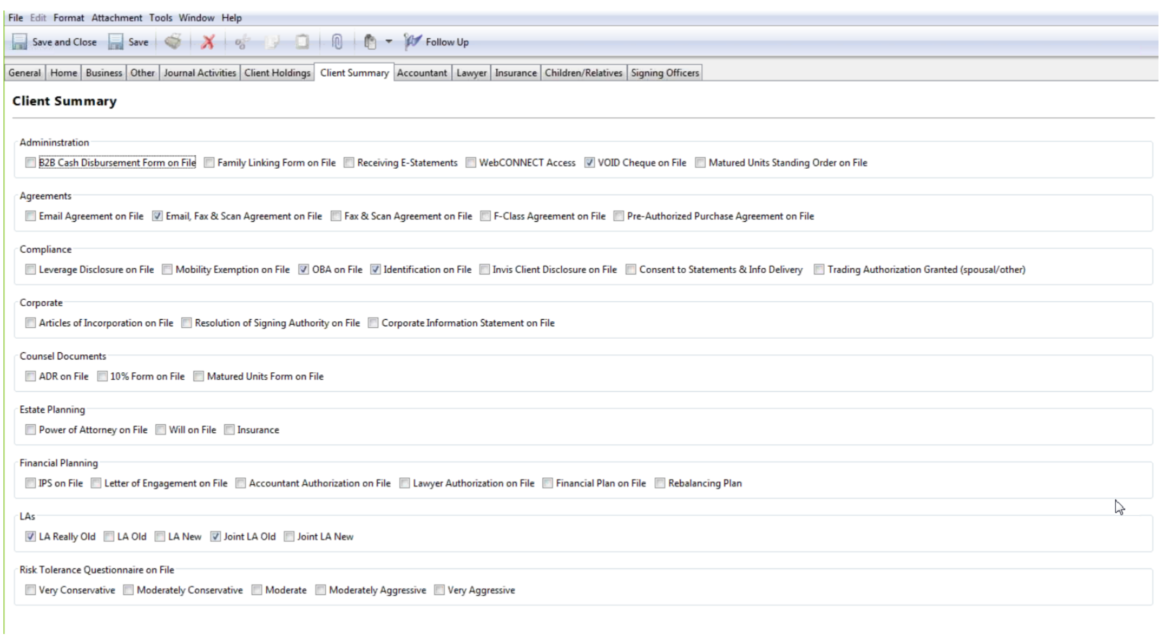
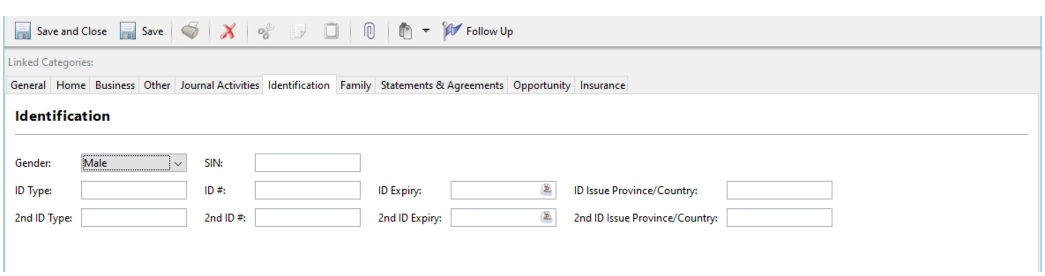
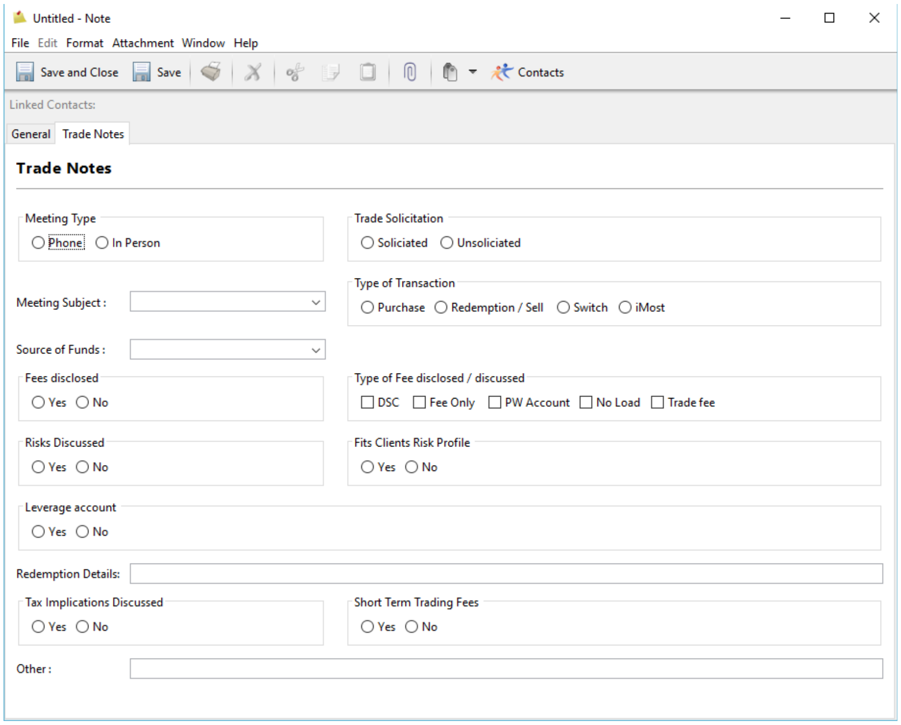
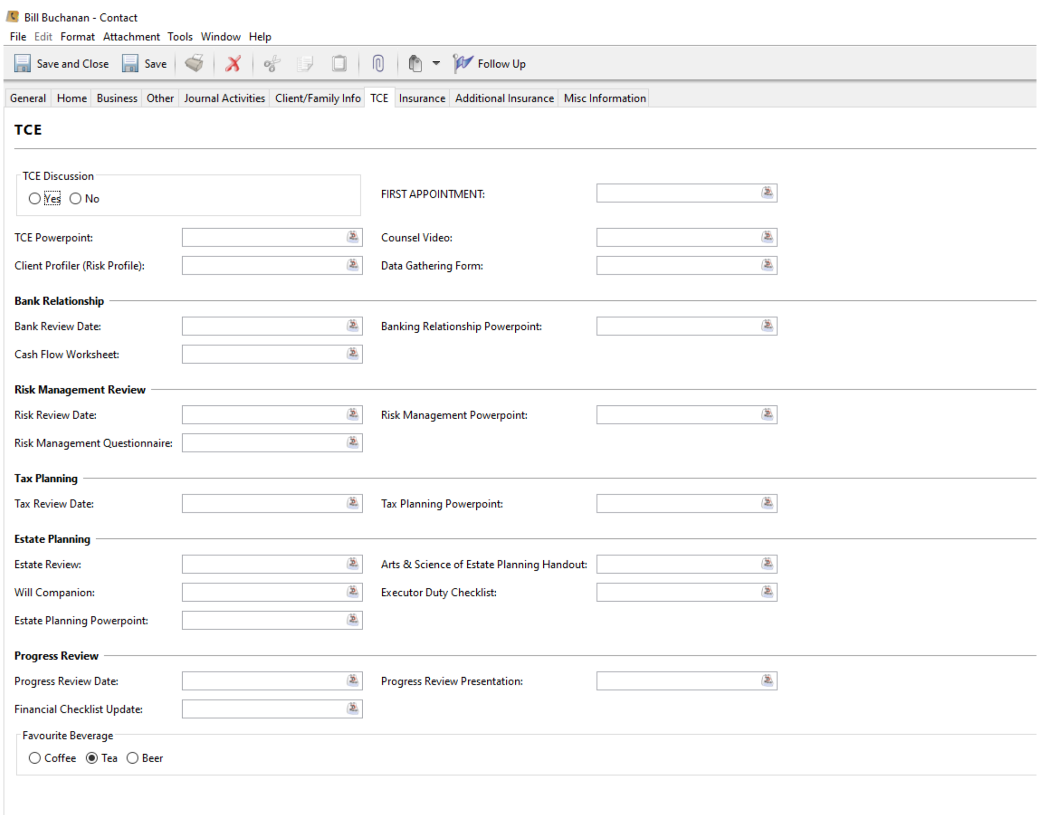
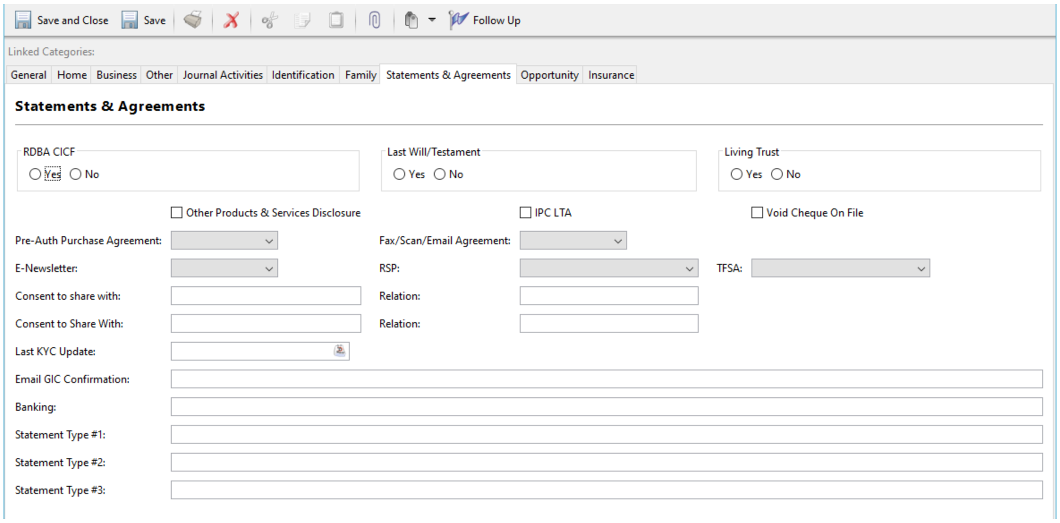
Business
Other
Journal Activities
Goldmine Fields
Department/Document Details
Insurance Policies
Living Benefits
NCAF
Systematic Plans
Advisor
Advisor
Advisor Name:
Advisor License Information
Advisor is Licensed for Investments in:
ON QC AB BC
Advisor is Life Licensed in:
ON QC AB BC
Life Insurance License Renewal Date:
Corporate Life License Renewal Date:
Errors and Ommissions Renewal Date :
Advisor Designations
CFP CIM FCSI CFA
Advisor Rep Codes
Advisor Rep Code for Investment Products:
Advisor Rep Code for Segregated Funds:
Advisor Rep Code by Insurance Company
Assumption:
Individual Code:
Corporate Code:
Company Name:
Insurance TESTING:

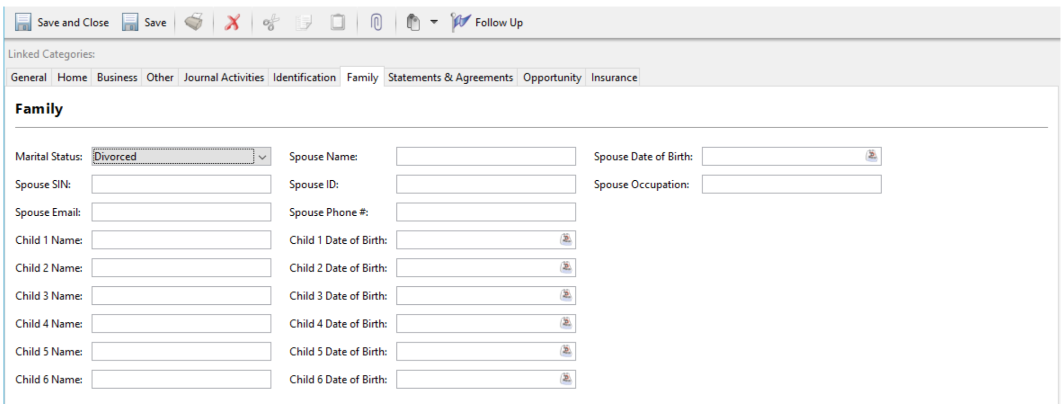

File Edit Format Attachment Tools Window Help
Save and Close
Save
Follow Up
General
Home
Business
Other
Journal Activities
Client Holdings
Client Summary
Accountant
Lawyer
Insurance
Children/Relatives
Signing Officers
Client Summary
Admininstration
B2B Cash Disbursement Form on File
Family Linking Form on File
Receiving E-Statements
WebCONNECT Access
VOID Cheque on File
Matured Units Standing Order on File
Agreements
Email Agreement on File
Email, Fax & Scan Agreement on File
Fax & Scan Agreement on File
F-Class Agreement on File
Pre-Authorized Purchase Agreement on File
Compliance
Leverage Disclosure on File
Mobility Exemption on File
OBA on File
Identification on File
Invis Client Disclosure on File
Consent to Statements & Info Delivery
Trading Authorization Granted (spousal/other)
Corporate
Articles of Incorporation on File
Resolution of Signing Authority on File
Corporate Information Statement on File
Counsel Documents
ADR on File
10% Form on File
Matured Units Form on File
Estate Planning
Power of Attorney on File
Will on File
Insurance
Financial Planning
IPS on File
Letter of Engagement on File
Accountant Authorization on File
Lawyer Authorization on File
Financial Plan on File
Rebalancing Plan
LAs
LA Really Old
LA Old
LA New
Joint LA Old
Joint LA New
Risk Tolerance Questionnaire on File
Very Conservative
Moderately Conservative
Moderate
Moderately Aggressive
Very Aggressive


Save and Close
Save
Follow Up
Linked Categories:
General
Home
Business
Other
Journal Activities
Identification
Family
Statements & Agreements
Opportunity
Insurance
Identification
Gender:
Male
SIN:
ID Type:
ID #:
ID Expiry:
ID Issue Province/Country:
2nd ID Type:
2nd ID #:
2nd ID Expiry:
2nd ID Issue Province/Country:


Untitled - Note
File Edit Format Attachment Window Help
Save and Close Save Contacts
Linked Contacts:
General Trade Notes
Trade Notes
Meeting Type
Phone In Person
Trade Solicitation
Soliciated Unsoliciated
Type of Transaction
Meeting Subject :
Purchase Redemption / Sell Switch iMost
Source of Funds :
Fees disclosed
Yes No
Type of Fee disclosed / discussed
DSC Fee Only PW Account No Load Trade fee
Risks Discussed
Yes No
Fits Clients Risk Profile
Yes No
Leverage account
Yes No
Redemption Details:
Tax Implications Discussed
Yes No
Short Term Trading Fees
Yes No
Other :


Bill Buchanan - Contact
File Edit Format Attachment Tools Window Help
Save and Close Save Follow Up
General Home Business Other Journal Activities Client/Family Info TCE Insurance Additional Insurance Misc Information
TCE
TCE Discussion
Yes No
FIRST APPOINTMENT:
TCE Powerpoint:
Counsel Video:
Client Profiler (Risk Profile):
Data Gathering Form:
Bank Relationship
Bank Review Date:
Banking Relationship Powerpoint:
Cash Flow Worksheet:
Risk Management Review
Risk Review Date:
Risk Management Powerpoint:
Risk Management Questionnaire:
Tax Planning
Tax Review Date:
Tax Planning Powerpoint:
Estate Planning
Estate Review:
Arts & Science of Estate Planning Handout:
Will Companion:
Executor Duty Checklist:
Estate Planning Powerpoint:
Progress Review
Progress Review Date:
Progress Review Presentation:
Financial Checklist Update:
Favourite Beverage
Coffee Tea Beer


Save and Close
Save
Follow Up
Linked Categories:
General
Home
Business
Other
Journal Activities
Identification
Family
Statements & Agreements
Opportunity
Insurance
Statements & Agreements
RDBA CICF
Yes
No
Last Will/Testament
Yes
No
Living Trust
Yes
No
Other Products & Services Disclosure
IPC LTA
Void Cheque On File
Pre-Auth Purchase Agreement:
Fax/Scan/Email Agreement:
E-Newsletter:
RSP:
TFSA:
Consent to share with:
Relation:
Consent to Share With:
Relation:
Last KYC Update:
Email GIC Confirmation:
Banking:
Statement Type #1:
Statement Type #2:
Statement Type #3:


Save and Close
Save
Follow Up
Linked Categories:
General
Home
Business
Other
Journal Activities
Identification
Family
Statements & Agreements
Opportunity
Insurance
Family
Marital Status:
Divorced
Spouse Name:
Spouse Date of Birth:
Spouse SIN:
Spouse ID:
Spouse Occupation:
Spouse Email:
Spouse Phone #:
Child 1 Name:
Child 1 Date of Birth:
Child 2 Name:
Child 2 Date of Birth:
Child 3 Name:
Child 3 Date of Birth:
Child 4 Name:
Child 4 Date of Birth:
Child 5 Name:
Child 5 Date of Birth:
Child 6 Name:
Child 6 Date of Birth: