

## How to add Attachments to Contacts

There are currently 2 methods of attaching a file or image to a contact in UVC.

## Method 1

- 1. Open an existing contact profile information window.
- 2. Use the **paper clip** icon to find and add your attachment to your current opened contact profile.



3. Once your attachment is successfully added click on the Save and Closed button to save your changes.

| eneral | Home Busine  | ss Personal/Mobile Other Journal A | Activities Client Holdings Misc | . Contact Information                |                     |      |   |            | 1 |
|--------|--------------|------------------------------------|---------------------------------|--------------------------------------|---------------------|------|---|------------|---|
| •      | Title        | · · · ·                            |                                 | File under                           | Business 🗸          |      | _ | _          | _ |
| C.     | Name:        | Tony                               |                                 | Middle:                              |                     |      |   | 3.         |   |
|        | Last Name:   | Almeida                            |                                 | Nickname                             |                     |      |   | 07         |   |
|        | Display as:  | Tony Almeida                       |                                 | <ul> <li>Service Profile:</li> </ul> |                     | ~    |   | <b>7</b> 2 | ł |
|        |              | Contact is a Link/Group            |                                 | Review Date:                         |                     | 2    |   | •          | Ń |
|        |              |                                    |                                 |                                      |                     |      |   |            |   |
| 5      | E-mail:      | tony@24test.net                    |                                 | Primary                              |                     |      |   |            |   |
|        | Home E-mail: |                                    |                                 | Primary                              |                     |      |   |            |   |
|        | Work E-mail: | tony@work24test.com                |                                 | Primary                              |                     |      |   |            |   |
|        | Owner:       | Alex Test1 🗸                       |                                 | Birthday:                            | 1-Dec-1979          | 6    |   |            |   |
|        |              | Private                            |                                 |                                      | Reset Birthday Link |      |   |            |   |
|        |              |                                    |                                 |                                      |                     |      |   |            |   |
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|        |              |                                    |                                 |                                      |                     |      |   |            |   |
| e Nam  | ie           | Description                        | File Stamp                      | Available on Server                  | Owner Name          | Size |   |            |   |
|        |              |                                    |                                 | _                                    |                     |      |   |            |   |

Failure to click on that button will not save the attachment on the selected client.

## Method 2

- 1. Open an existing contact profile information window.
- 2. Drag and drop the file or image to the contacts profile.

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | -                      |                                                                                  |                  |                     |     | _   |   |
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| NE E                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Tony Almeida - Con     | tact                                                                             |                  |                     | -   | - U | × |
| ClientSnap                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | File Edit Format Attac | chment Tools Window Help                                                         |                  |                     |     |     |   |
| N                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Save and Close         | 🔜 Save   🐳   🔏 😥 🔲 👖 🕅 🔻 🊧 Follow Up                                             |                  |                     |     |     |   |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | General Home Busine    | ess Personal/Mobile Other Journal Activities Client Holdings Misc. Contact Infor | nation           |                     |     |     |   |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | rtitle:                | v                                                                                | File under:      | Business ~          |     |     |   |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Name:                  | Tony                                                                             | Middle:          |                     |     | 100 |   |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Last Name:             | Almeida                                                                          | Nickname:        |                     |     | E.  |   |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Display as:            | Tony Almeida 🗸                                                                   | Service Profile: | ~                   |     | 1   |   |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | $\mathbf{N}$           | Contact is a Link/Group                                                          | Review Date:     | 2                   |     |     |   |
| 14-14-                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | E-mail:                | tonv@24test.net                                                                  | Primary          |                     | 1.1 |     |   |
| The second                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Home E-mail:           |                                                                                  | Primary          |                     |     |     |   |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Work E-mail:           | tony@work24test.com                                                              | Primary          |                     |     |     |   |
| a standard and a standard an |                        |                                                                                  |                  | 44.                 |     |     |   |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Owner                  | Alex Test1 V                                                                     | Birthday:        | 1-Dec-1979          |     |     |   |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | · _ \                  | Private Private                                                                  |                  | Reset Birthday Link |     |     |   |
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3. Once your attachment is successfully added click on the **Save and Closed** button to save your changes. Failure to click on that button will not save the attachment on the selected client.

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| neral   | Home Busine  | ess Personal/Mobile Other Journal | Activities Client Holdings Mi | sc. Contact li | nformation       |                     |            |        |   |
| ٢       | Title:       | ~                                 |                               |                | File under:      | Business v          |            |        |   |
|         | Name:        | Tony                              |                               |                | Middle:          |                     |            | 100    | 1 |
|         | Last Name:   | Almeida                           |                               |                | Nickname:        |                     |            | 2      |   |
|         | Display as:  | Tony Almeida                      |                               | $\sim$         | Service Profile: |                     | $\sim$     |        |   |
|         |              | Contact is a Link/Group           |                               |                | Review Date:     |                     | 2          |        |   |
| 7       | E-mail:      | tony@24test.net                   |                               |                | Primary          |                     |            | 1 de 1 |   |
|         | Home E-mail: |                                   |                               |                | Primary          |                     |            |        |   |
|         | Work E-mail: | tony@work24test.com               |                               |                | Primary          |                     |            |        |   |
|         | Owner:       | Alex Test1 🗸                      |                               |                | Birthday:        | 1-Dec-1979          | <u>66.</u> |        |   |
|         |              | Private                           |                               |                |                  | Reset Birthday Link |            |        |   |
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| Manne   |              | Description                       | File Stamp                    | Availa         | ible on Server   | Owner Name          | Size       |        |   |

If you ever want to delete a file or image attached to a contacts profile you simply have to open the contacts profile and select the file or image you want to delete and right click and select the option **Remove**.

Once your attachment is successfully deleted click on the **Save and Closed** button to save your changes. Failure to click on that button will not remove the file or image on the selected client.

