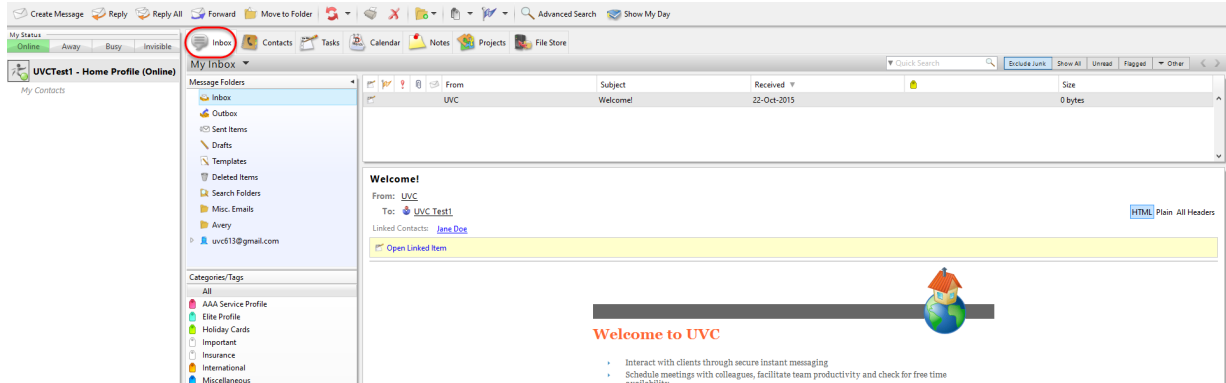


Inbox Module

INTRODUCTION

To access the **Inbox Module** simply click on the Inbox tab or the large Inbox button on the left (if you are in the Special view).



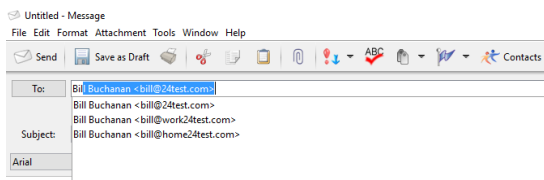
To Create a New Message

To create a new message use the following steps:

1. Click on the **Create Message** button located on the upper left corner of the screen.



2. Use the **To** field to add the e-mail address of the contact.
Notice that when you start typing the first letters of the contacts e-mail, UVC will find any e-mail address currently matching your contacts list and any shared contact list you may have access too. Simply select the correct e-mail address to add it to the **To** field. This process can be repeated for the **Cc** field and **Bcc** field.



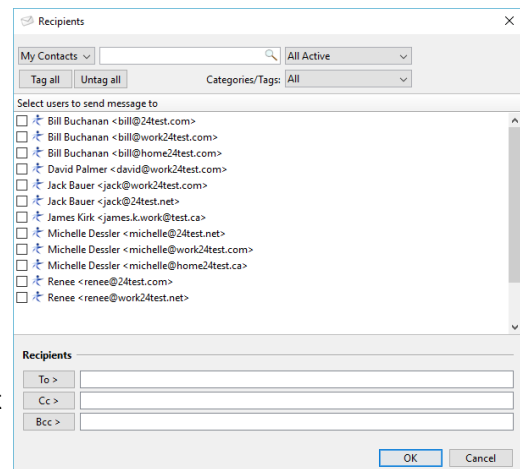
3. As an alternative click on either the **To** or **Cc** or **Bcc** field to add your contact.

A lists of all your contacts will be displayed.

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.

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. The ability to search by Categories/Tags and by groups is there too.

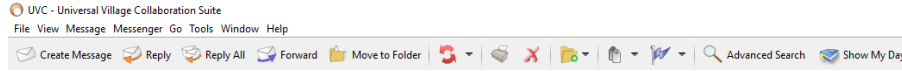


- Once you have moved the contacts to the appropriate recipient boxes that you would like to send your e-mail to simply click on **OK** button. You will be brought back to the **Create Message** window where you will be able to write and send an e-mail.

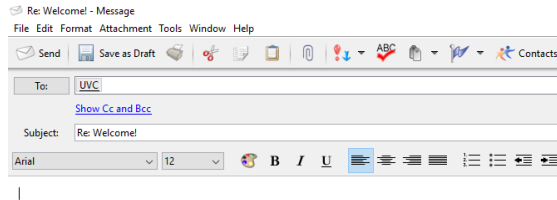
To Reply to an E-mail Message

To reply to an e-mail message use the following steps:

- Click on the **Reply** button located on the upper left corner of the screen.



- The **To** field will be pre-filled with the originator's e-mail address



- Click on either the **To** or **Cc** or **Bcc** field to add another contact.

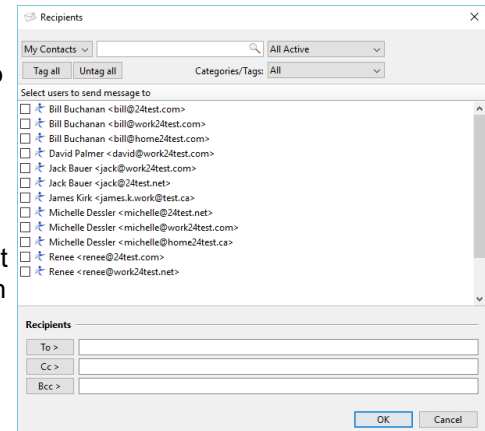
A lists of all your contacts will be displayed.

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.

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. The ability to search by Categories/Tags and by groups is there too.

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



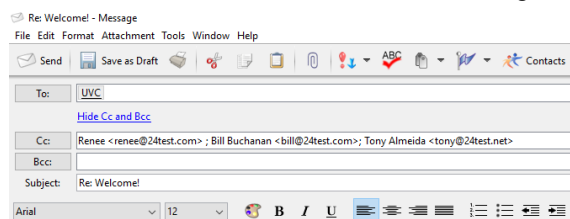
To Reply All to an E-mail Message

To reply all to an e-mail message use the following steps:

- Click on the **Reply All** button located on the upper left corner of the screen.



- The **To** field will be pre-filled with the originator's e-mail address and the **Cc** field will have all contacts e-mail addresses that were included in the original received e-mail.



- Click on either the To or Cc or Bcc field to add another contact.

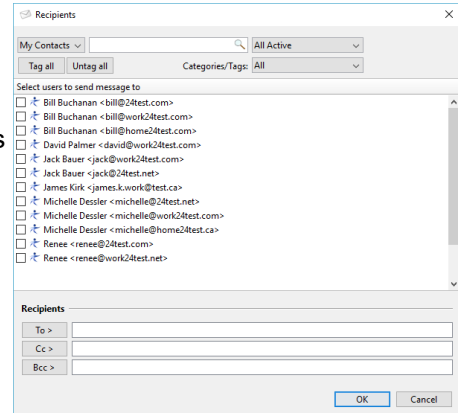
A lists of all your contacts with be displayed.

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.

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. The ability to search by Categories/Tags and by groups is there too.

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



To Forward an E-mail Message

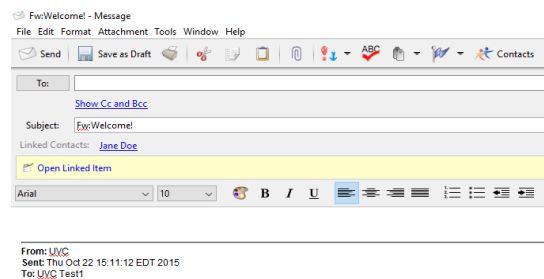
To forward an e-mail message use the following steps:

- Click on the **Foward** button located on the upper left corner of the screen.



- Use the **To** field to add the e-mail address of the contact.

You will notice that when you start typing the first letters of the contact's e-mail, UVC will find any e-mail address currently matching your contacts list and any shared contact list you may have access too. You can simply select the correct e-mail address to add it to the **To** field. This process can be repeated for the **Cc** field and **Bcc** field.

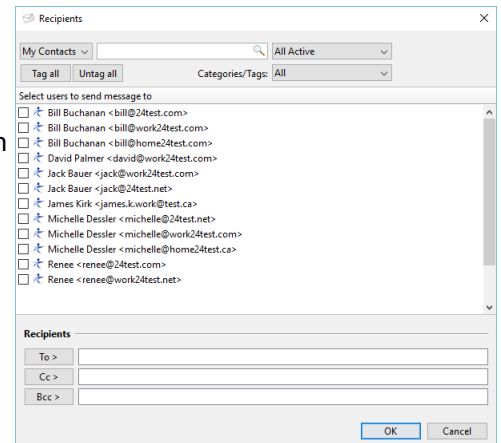


- Click on either the To or Cc or Bcc field to add another contact.

A lists of all your contacts with be displayed.

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. 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. The ability to search by Categories/Tags and by groups is there too.



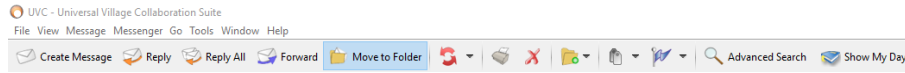
- Once you have moved the contacts to the appropriate recipient boxes that you would like to reply your e-mail to simply click on **OK** button. You will be brought back to the **reply all message** window where you will be able to write and send your e-mail.

How to move an e-mail to a folder

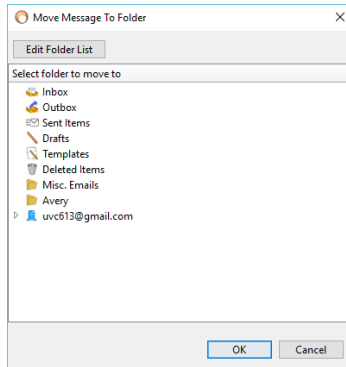
The Move to Folder button allows to move a selected e-mail to a folder of your choice.

To move an e-mail to a folder use the following steps:

1. Select the e-mail.
2. Click on the **Move to Folder** button.



3. Select the folder where the e-mail will be moved.



4. Click on the **OK** button.

The Send and Receive All option

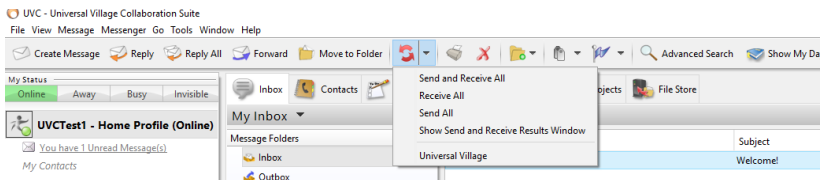
The **Send and Receive All** option allows to send any e-mail waiting in queue and receive any incoming e-mail. This action is not mandatory but the ability to refresh the outgoing and/or incoming e-mails manually is available.

To refresh the send and received e-mails use the following steps:

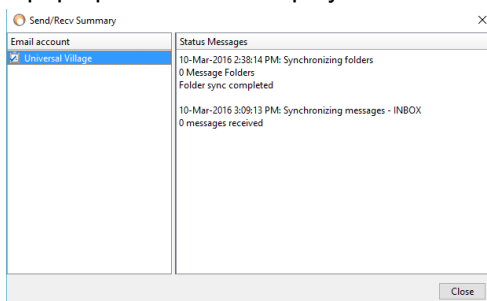
1. To refresh the incoming and outgoing e-mails simply click on the red circled arrows icon button.



2. Refresh the incoming or outgoing e-mails only by clicking on arrow pointing downwards, next to the red circled arrows icon, and select to either refresh the **Received All** e-mails or the **Send All** e-mails.



3. **Show the send and receive results** window by selecting that option. A pop-up window will display all send/receive results.

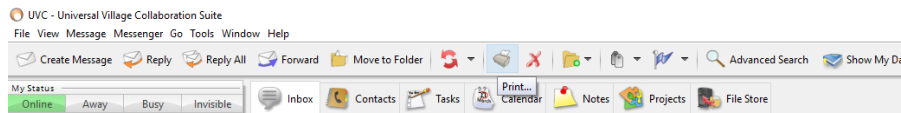


Print

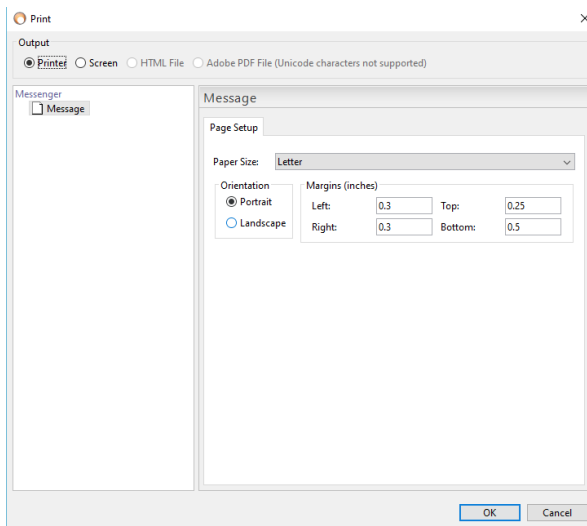
The print option will print the current selected e-mail to the printer configured on your computer.

To print an e-mail use the following steps:

1. Select the e-mail to be printed from any folder located in your Inbox Module.
2. Click on the **Print** button located on the top.



3. Select the printing parameters available on the below screen.



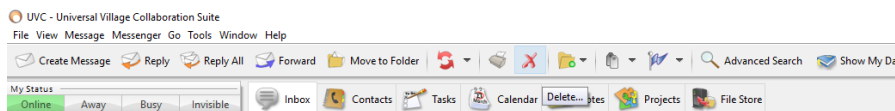
4. Click on the **OK** button to open your current default printer dialogue box and print.

Deleting an e-mail

At anytime an e-mail can be deleted from any folder (except the Outbox folder) located in the Inbox Module.

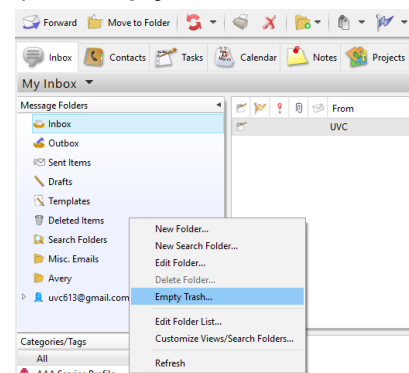
To delete an e-mail use the following steps:

1. Open the desired folder located in your **Inbox Module** and select the e-mail you want to delete.
2. Click on the **red X** delete button located on the top to delete the e-mail.



This action will move the deleted e-mail to the **Deleted Items** folder. Clean-up the e-mails in the **Deleted Items** folder by simply right clicking on that folder and selecting the option **Empty Trash**.

Note: Once you have emptied your trash or have deleted an e-mail from the Deleted items folder this action can no longer be undone.

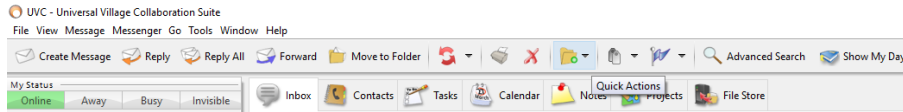


Using and creating a Quick Action

A **Quick Action** is an option that lets you create and assign an action on an e-mail once it's been sent successfully. It can mark e-mails as read or flag them so you can follow up on them at a later date/time. You can even move e-mails to a folder using the **Quick Action**. These **Quick Actions** are important if an action is constantly being repeated in the **Inbox Module**. The task can now be simplifying by selecting a **Quick Action** from the drop down box. There are 11 **Quick Actions** available at your disposal.

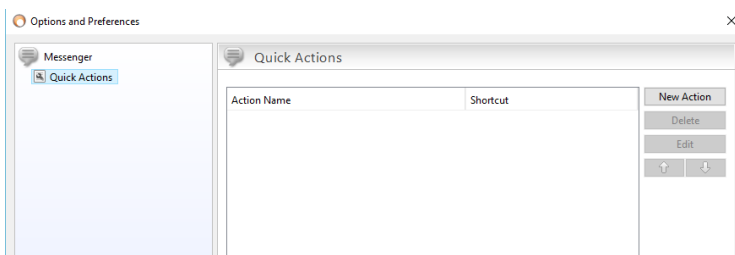
To create a **Quick Action** use the following steps:

1. Click on the **Quick Actions** button located on the top.

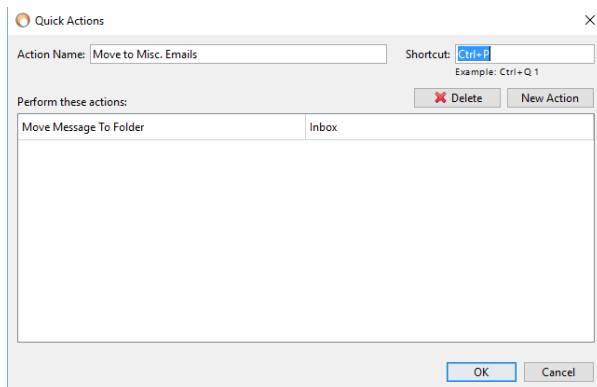


Select the option **Edit Quick Actions**.

2. Click on **New Action** button to create the new quick action.

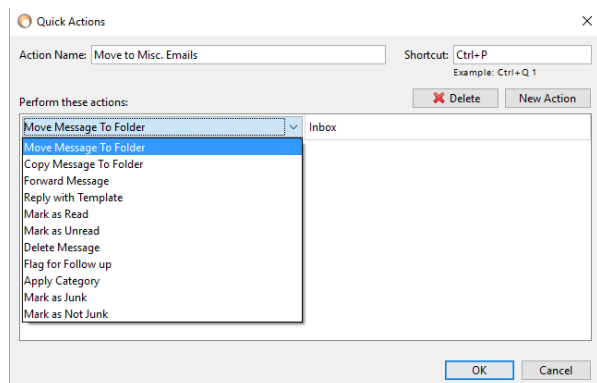


3. Enter an **Action Name**.

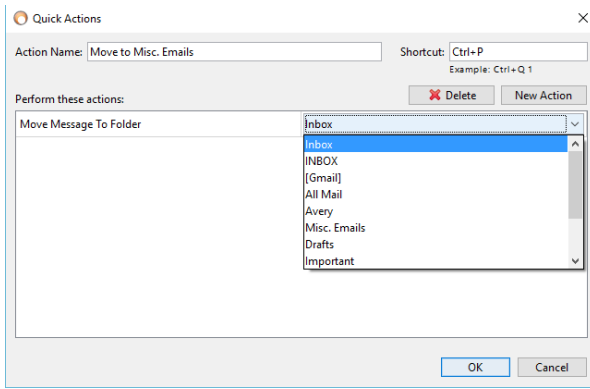


You can even add a **Shortcut** (not mandatory) for this new quick action.

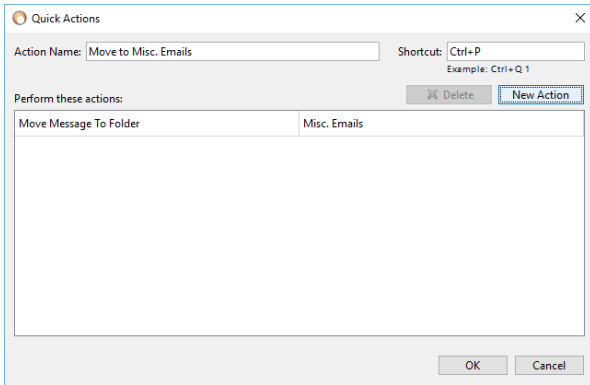
4. Under the **Perform these actions** column select any of the available actions from this drop down menu.



- On the right side select the folder for which this quick action will be applied.



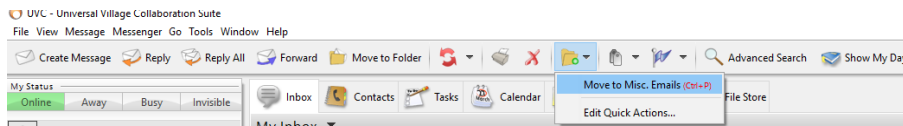
- Add a single or as many actions as you want to a single **Quick Action**. Simply click on the **New Action** button to add a second, third etc ... new action.



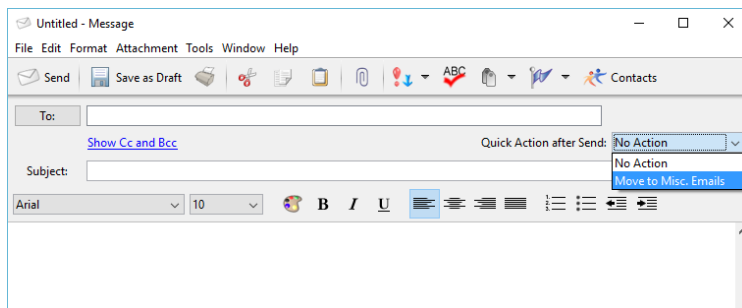
Note: Click on the **Delete** button to remove a Quick Action.

- Click on the **OK** button to save the **Quick Action**.

You will now have the ability to choose this newly created **Quick Actions** by clicking on the **Quick Actions** button and selecting it.



The option **Quick Action after Send** will be available when creating a new e-mail or reply or forward an e-mail. The quick action will be applied automatically.

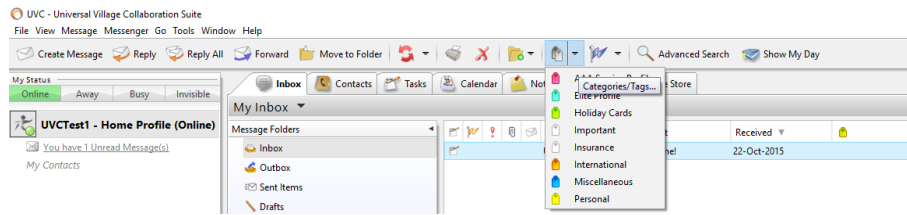


Applying Categories/Tags to your E-mails

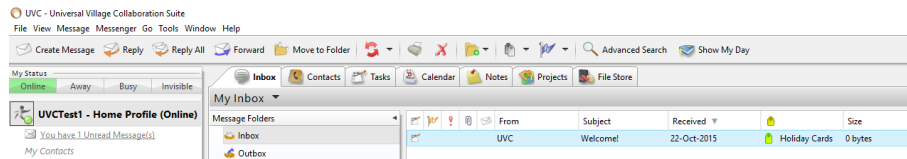
UVC provides the ability to apply custom categories/tags to any e-mail. This is particular useful if you prefer to categorize the e-mails according to a specific priority for example.

There are 2 different ways of applying **Categories/Tags** to an e-mail. To apply a category/tag to your e-mail use the following steps:

1. Select any e-mail located in any folder located in your **Inbox Module**.
2. Click on the arrow pointing downwards next to the **Categories/Tags** button located on the top of UVC.

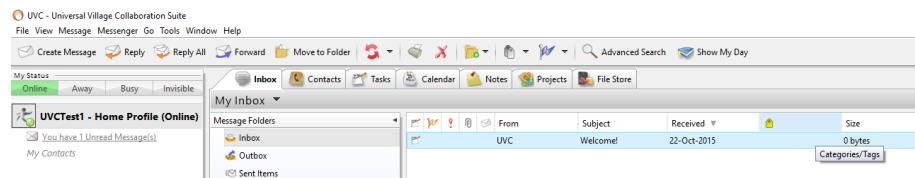


3. Select the **Categories/Tags** from the list provided to apply it to your selected e-mail.

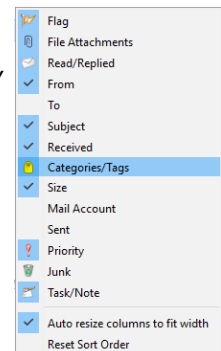


You can apply as many **Categories/Tags** as you want to a single e-mail.

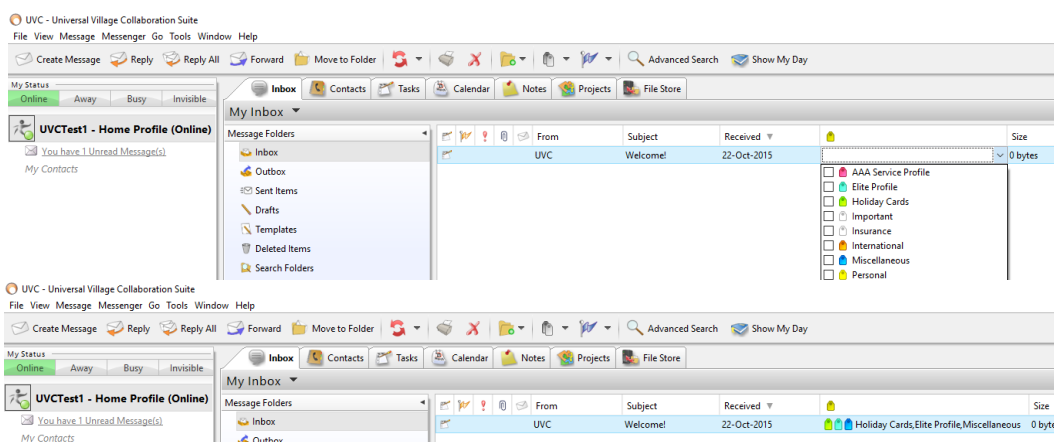
1. Your second method of applying a **Category/Tag** to an e-mail is to select an e-mail from any folder located in your **Inbox Module**.
2. Click on the empty **Categories/Tags** cell column of your selected e-mail.



Note: if you do have the column header categories/Tags simply right click on any current header and add your Categories/Tags header to your group of visible headers in your Inbox Module.



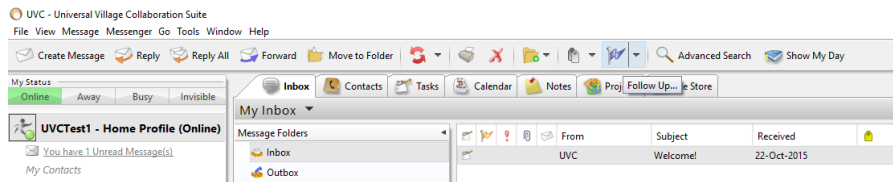
3. Select any **Categories/Tags** that needs to be applied to the selected e-mail.



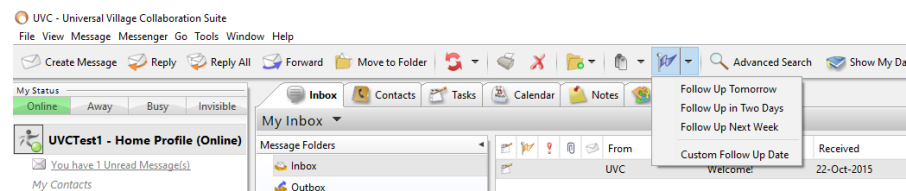
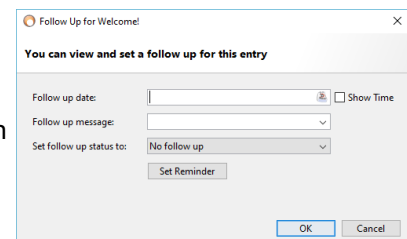
Follow Up

The option to flag an e-mail for follow up and set a reminder is available in the Inbox Module. To flag an e-mail for follow up please use the following steps:

1. Find and select the e-mail in which a follow-up tag should be added.
2. Click on the **Follow Up** blue flag located on the top on the Inbox Module and select the **Follow Up** option from the menu.



3. Enter the **Follow up date** for the follow up.
4. Select what type of follow up it is to be 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. Set a reminder by clicking 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 checkmark beside the appropriate option.
 - d) If you have selected e-mail or mobile phone, enter your address or phone number.
 - e) Click on the **OK** button.
7. The ability to create a follow up Tomorrow, in Two Days or Next Week is also available. These options are available when you click on the arrow pointing downwards next to the **Follow Up** blue flag.



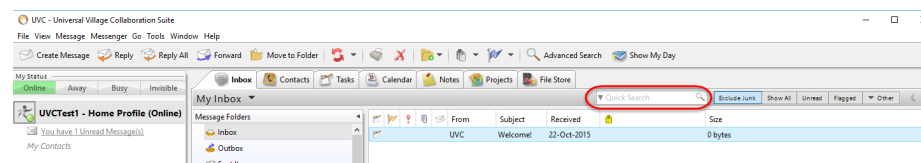
Note: on the due date of the follow up the e-mail will show up on the top of your e-mails in your Inbox folder. They will also be shown in the My Day panel.

Quick and Advance Search options

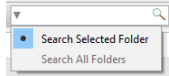
The Inbox Module allows you to perform a **Quick Search** on all your folders or only one selected folder or perform in your Inbox Module. The ability to do an **Advance Search** for a more precise search on your e-mails is also available.

To perform a **Quick Search** please use the following steps:

1. Click on the arrow pointing downwards next to the **Quick Search** field.



- You will have the ability to do a **Quick Search** for a selected folder or all folders.

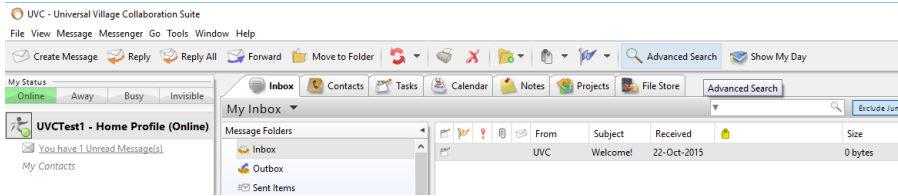


- Type the key word in the **Quick Search** field. Automatically the **Quick Search** feature will start searching all e-mails (subject, e-mail message body, the To, Cc and Bcc field etc ...) for that key word. Once it finished searching UVC will show you the results.

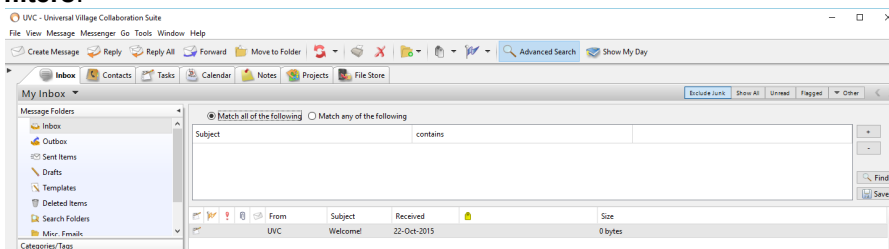
Note: The Quick Search will only display e-mails that have your keyword inside the e-mail. If the word is followed by another word without a "space" that e-mail will not be part of the searched results.

To perform an **Advance Search** please use the following steps:

- Click on the Advance Search button located on the top on your Inbox Module.



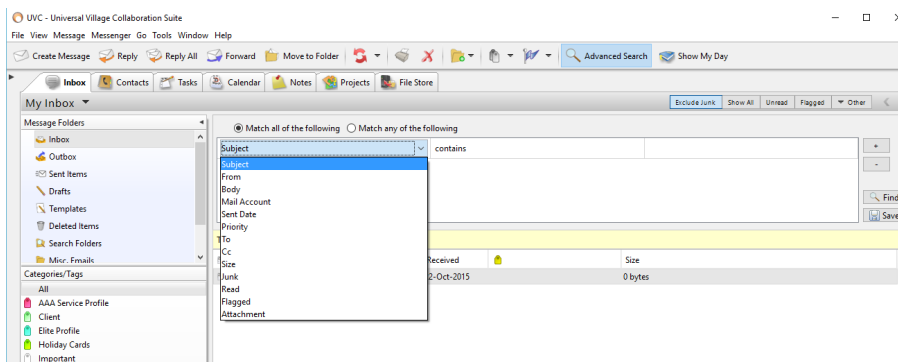
- This option will display the advance search filters available in your Inbox Module. First select if you want to **Match all of the following** search filters or **Match any of the following filters**.



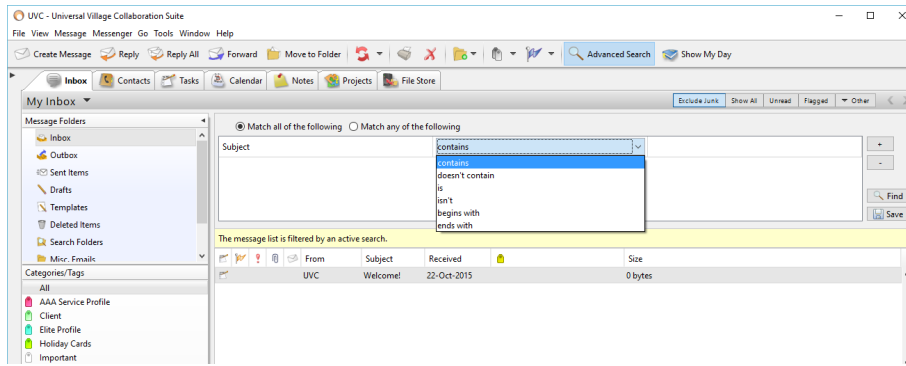
The option **Match all of the following** will use all of your filters to search for the e-mail(s). Only the e-mails matching exactly all of your search filters will display on the search results. If none of the e-mails matches all the search filters then no results will be displayed.

The option **Match any of the following** will use all of your filters to search for the e-mail(s). Only the e-mails matching any of the search filters will display on the search results. If none of the e-mails matches any the search filters then no results will be displayed.

- Click on the first column to display your first filter options. Options ranging from Subject to Attachments are available to pick from.

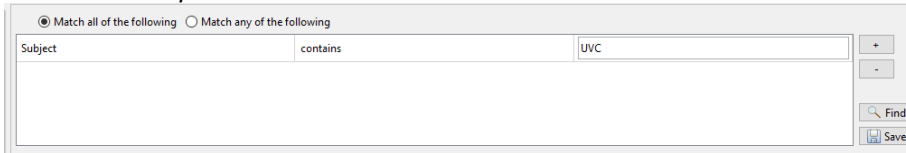


- Next click on the second column to see the available options for the filter.



- Depending on the second column selection the third and final column might be editable to type in (to specify a key word) or it might have different options to select from using a drop down menu or it might not even be editable at all.

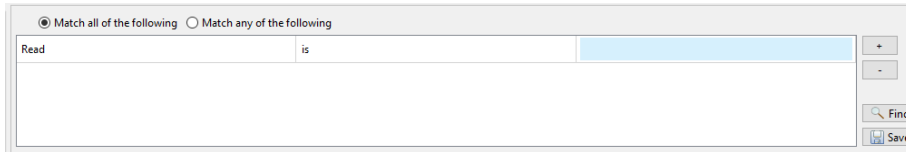
Editable third option.



Options available from drop down menu.



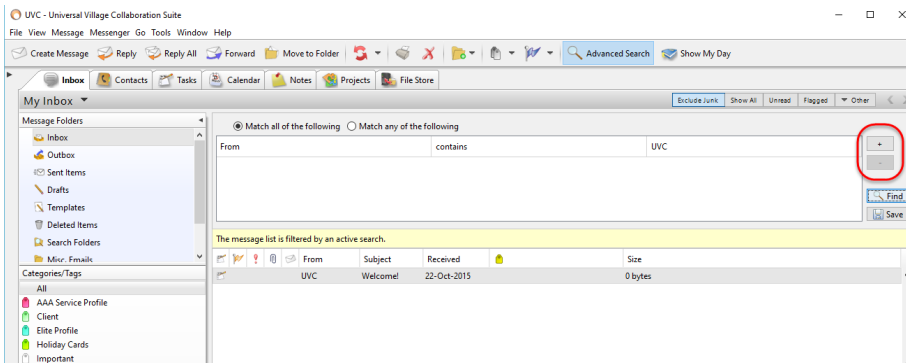
Not editable third option (blank not editable).



- Once you have created your first filter you have the ability to add a second, third, fourth etc ... filter to this **Advance Search**. It is not mandatory but the option is there to narrow down the search results.

Click on the **+ symbol** button to add a new filter.

Click on the **- symbol** button to delete any or all your filters.



- Once you have added all the filters click on the **Find** button to start your search. You will see the message below when your search is completed.

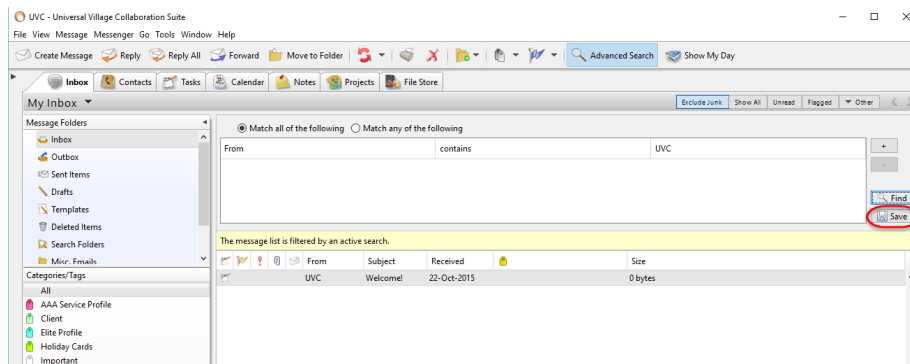
The message list is filtered by an active search.

Save an Advance Search

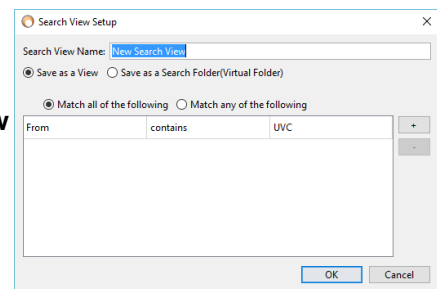
If on a daily/weekly/monthly basis you are searching for the same information UVC has the ability to save your Advance Searches.

To save your Advance Searches please use the following steps:

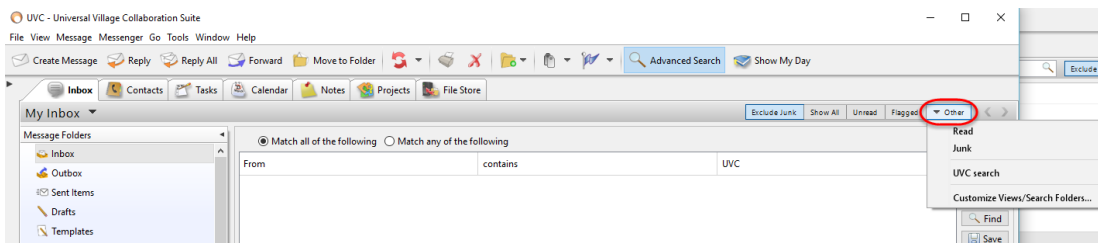
1. Once filter(s) have been added to an Advance Search click on the **Save** button located on the right.



2. In this Search View Setup pop-up window add a new **Search View Name** which will appear as the search name. Click on the **OK** button to save and add the new Advance Search filter in your UVC.

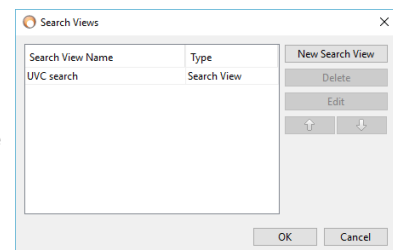


3. The available saved Advance Search options will be located under the **Other** drop down menu.



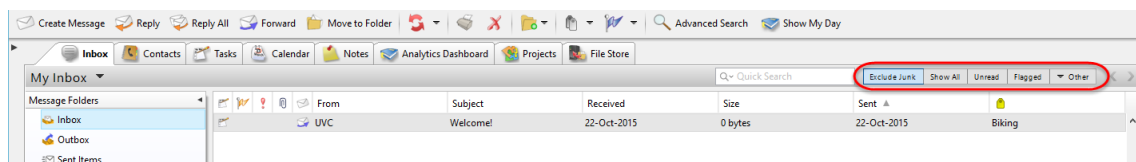
4. From this **Other** menu you can also customize and view your saved advance searches.

You can **Delete** a selected search that is no longer needed or if you can add a new filter to a saved search by selecting the save Advance Search of your choice and clicking on the **Edit** button. Take note that you can also create a new Advance Search from this window by clicking on the **New Search View** button.



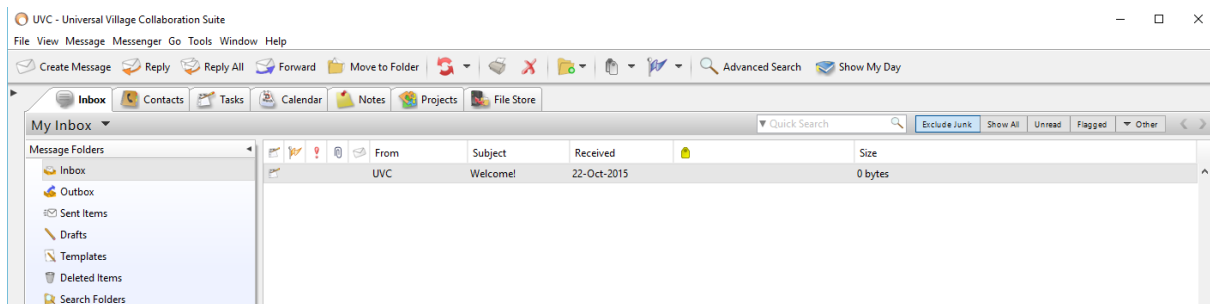
Different e-mail Viewing Options

Located on the upper right side of the Inbox Module you can select if you want to **Exclude Junk** e-mails, **Show All** e-mails, show only **Unread** e-mails or show e-mails that are **Flagged**. The **Other** options will have filters to show **Read** or **Junk** e-mails and any of your current Advance Search filters that have been saved.



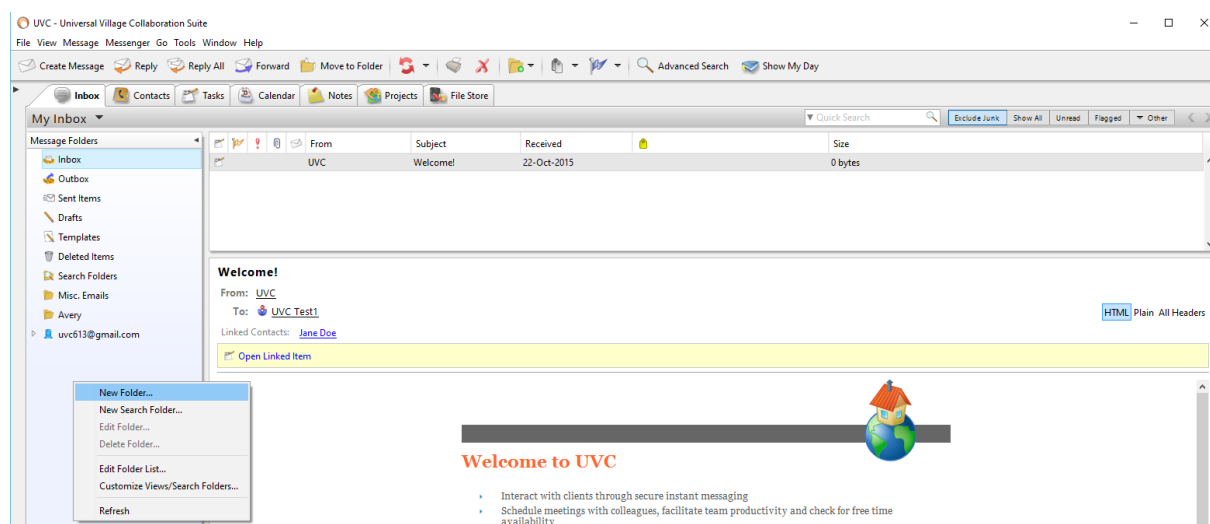
Message Folders

All e-mail message folders will be listed under the **Message Folders** header. As default you will be able to see your Inbox, Outbox, Sent Items, Drafts, Templates, Deleted Items folder and your Search Folders.

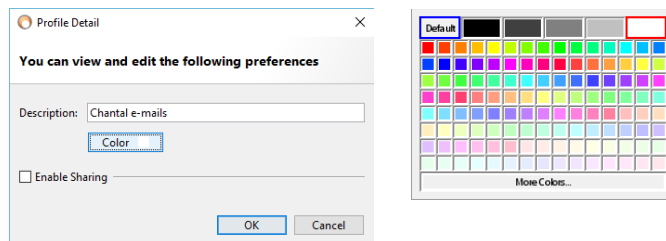


You can create a new e-mail folder and assign a color to it if needed. To create a new e-mail folder please use the following steps:

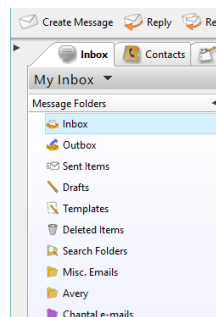
1. Right click anywhere in the blue area and select the option **New Folder**.



2. Enter a **Description** and select a color for the folder if needed.



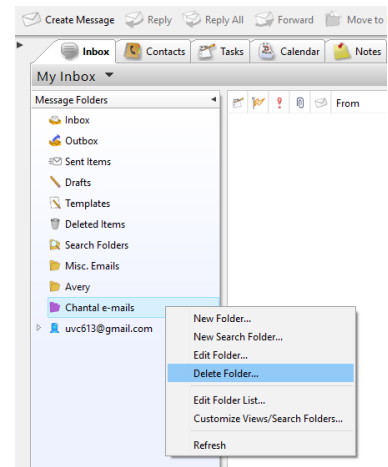
3. Click on the **OK** button to save the new e-mail folder. It will appear under your **Message Folders** with the selected color if specified in **Step #2**.



To **delete** an e-mail folder please use the following steps:

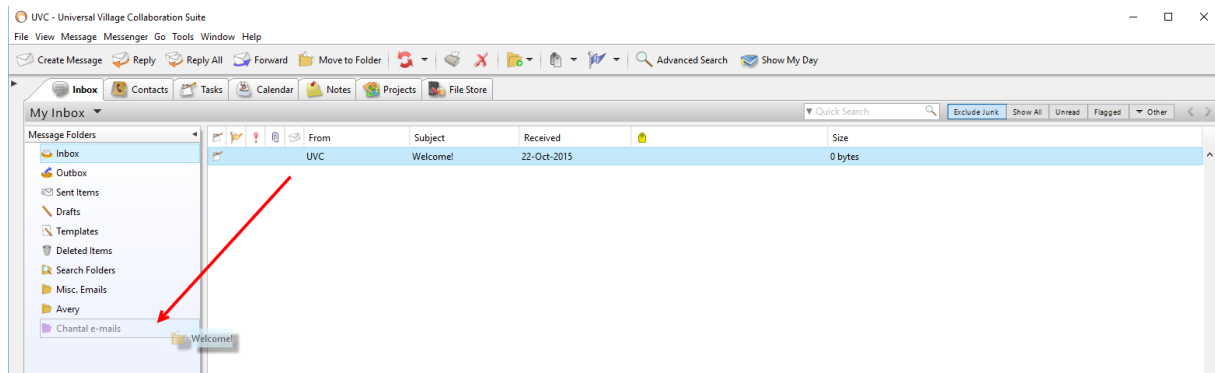
1. Right click on the e-mail folder of your choice.
2. Select the option **Delete Folder** from the options seen.

Note: This action cannot be undone. If you delete the folder it will delete all e-mails within that folder. If any e-mails were linked directly to a contact under your Contact Module all these e-mails will not longer appear under the Journal Activity of those contacts.



Moving e-mails from one e-mail folder to another

Under the Inbox Module you can move the e-mails from one folder to a different e-mail folder by simply selecting the e-mail(s) of your choice and dragging them to the different folder.

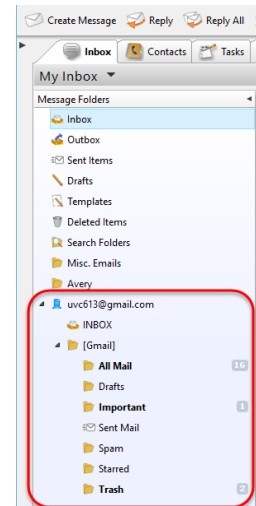


Viewing your 3rd Party e-mail Accounts Folders

UVC allows you to add any POP3 or IMAP e-mail account like Gmail, Outlook or Hotmail.

You will see all e-mail folders affiliated to these e-mail accounts under the **Message Folders** section. They will be clearly identified under the appropriate e-mail account that was configured in UVC.

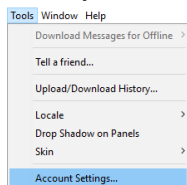
Click on any e-mail folder to see its contents.



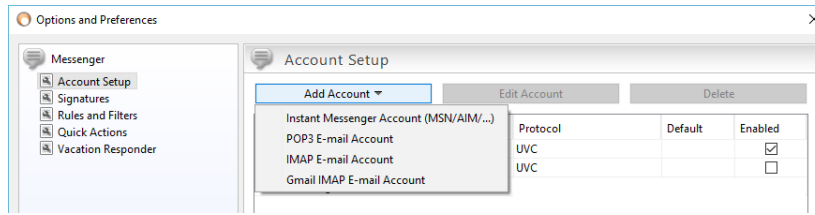
Adding a 3rd party E-mail Account

As explained above you can add any **IMAP** and/or **POP3** e-mail account in UVC. To add a new 3rd party **IMAP** and/or **POP3** e-mail account please use the following steps:

1. Under you Inbox Module click on **Tools -> Account Settings**.



2. On the left side click on the **Account Setup** option.
3. On this window you will be able to **Add an Account, Edit** or **Delete** an existing e-mail account. To add a new e-mail account click on **Add Account** button and select



Under this pull down menu you will have 4 options to choose from:

Option 1 – Instant Messenger Account (MSN/AIM)

This option allows you to add your MSN or AIM account information. Enter all the required credentials to add your MSN/AIM account. Please note that you will need to install the AIM plugins if you want to add the AIM account.

Option 2 – POP3 E-mail Account

By using a Post Office Protocol 3 (POP3) e-mail account, your e-mail messages are downloaded to your computer and then usually deleted from the mail server. The main disadvantage of POP3 accounts is the difficulty to save and view your messages on multiple computers. Also, messages that you send from one computer are not copied to the **Sent Items** folder on the other computers. But there are some workarounds for these issues.

Option 3 – IMAP E-mail Account

With an Internet Message Access Protocol (IMAP) account, you have access to e-mail folders on the mail server, and you can save and process e-mail without downloading it to the computer that you are working on. Thus, you can use a different computer to read your messages wherever you are. Your mail is saved on the mail server, which is safer, and is usually backed up by your mail administrator or ISP.

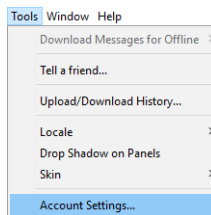
Option 4 – Gmail IMAP E-mail Account

The Gmail IMAP e-mail account option is the same as the IMAP e-mail account option mentioned above but the difference is that some of the internet E-mail Settings windows are prefilled with the necessary Gmail information needed to add your Gmail account in UVC.

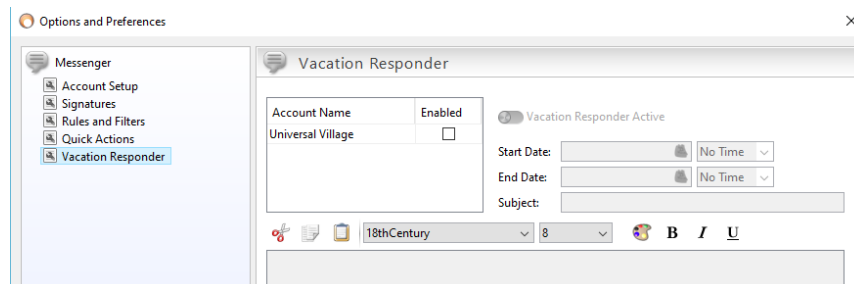
How to configure the Vacation Responder (Out of Office)

To configure the **Vacation Responder** please use the following steps:

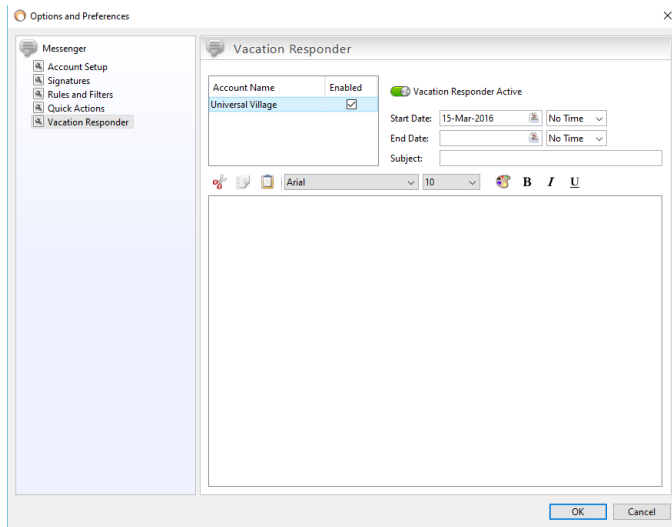
1. From the Inbox Module click on **Tools -> Account Settings**.



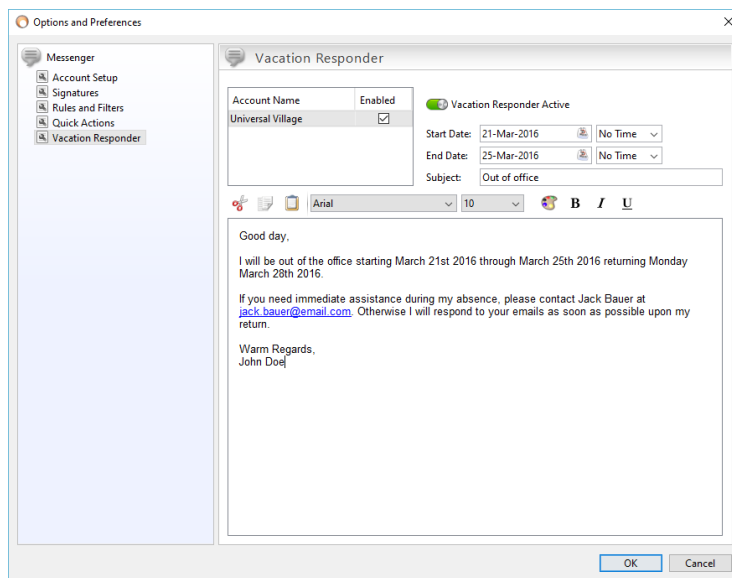
2. On the left side click on the **Vacation Responder** option.



- Select the e-mail account that you want to enable the “out of office” message. Make sure the option **Vacation Responder Active** is green (enabled). Enter the **Start Date** of when the Vacation Responder should begin. If needed you can add a time too. Enter the **End Date** of when the Vacation Responder should begin. If needed you can add a time too. Enter the **Subject** of the Vacation Responder e-mail your recipients will receive. Finally type the message for the “out of office” e-mail message.

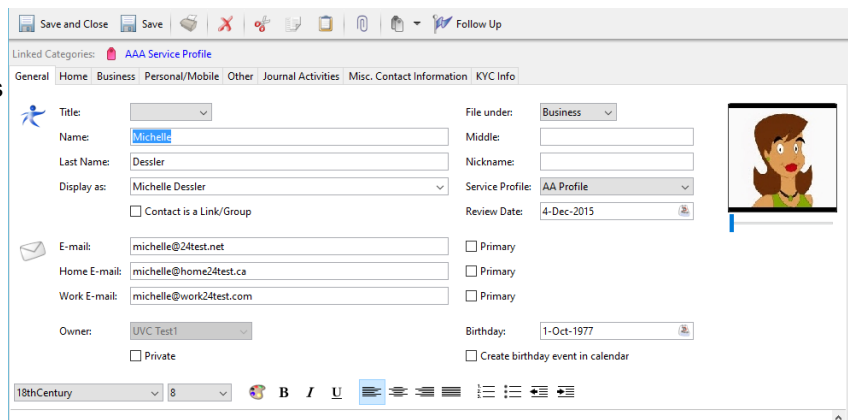


- Click on the **OK** button to save your changes.



Linking an E-mail to a contact

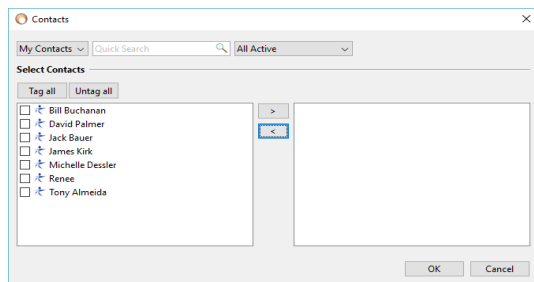
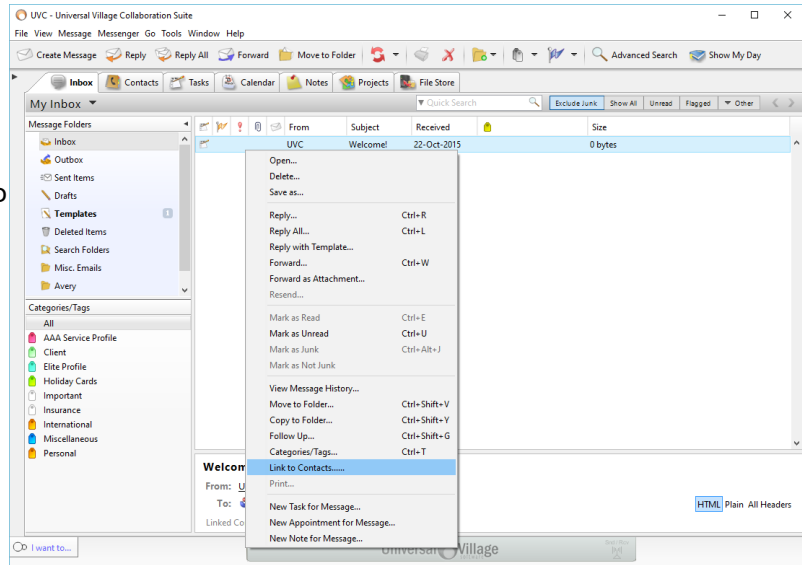
E-mails that appear under the **Journal Activity** are based on the client's e-mail address that is entered under the client's Contact details screen. As long as that e-mail address exist under either the E-mail or Home E-Mail or even the Work e-mail address field all e-mail messages will automatically be linked to the contact matching the e-mail address.



But there are some scenarios where an exchange of e-mails will not include the contacts e-mail address. For example if you e-mail directly a 3rd party provider with a question which impacts one of your contacts, that e-mail will not necessarily include the contacts e-mail address in the **To** or **Cc** field. In these type of cases you should link manually the e-mails to the contact. This will assure that all e-mails, including the ones not sent directly to the contact, will be seen under the **Journal Activity** tab.

To manually **link an e-mail to a contact** please use the following steps:

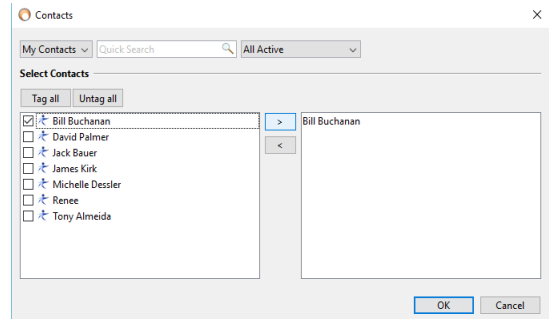
1. Select the e-mail you want to link to an existing contact.
2. Right click on that selected e-mail and on the options menu select **Link to Contacts**.
3. A lists of all your current contacts will be displayed.



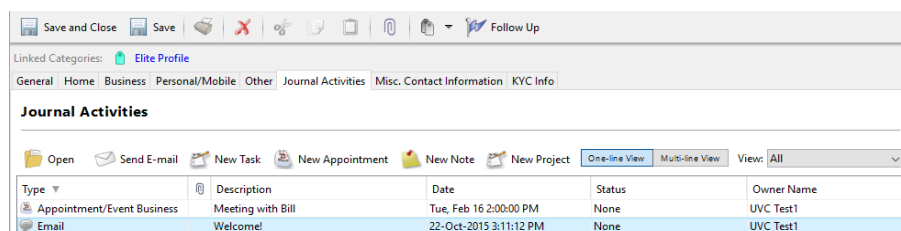
4. Move the contact(s) that you would like to link your e-mail to by placing a check mark in the box beside their name and clicking on the arrow > button to move the contacts to the box on the right.

If the contact list is too long use the Quick Search field to narrow down the search to one name if needed. This Quick Search field will search for any data that was entered on the contact information sheet such as name, address or phone number. The ability to search by Categories/Tags and by groups is there too.

Once the contact(s) is moved simply click on **OK** button.



You will be able to see the linked e-mail under the **Journal Activity** of the contact(s) selected in the steps above.



Navigating in the Inbox Module Screen

The following is an explanation of the buttons used to navigate your way through the Inbox Module:

A. This drop down menu is used to flip between your Inbox and the inbox of contacts you have full access to.

B. To flip between Exclude Junk, Show All, Unread, Flagged and Other e-mails you have in the selected e-mail folder.

C. This Quick Search field will search for any data that it matches on any e-mails with a selected folder or all folders in your inbox.

D. This area will show you all your current inbox folders.

E. This area will show you all default and custom Category/Tags that can be associated to your e-mails.

F. 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.

