

UVC's Best Practices

This guide will explain the six best practices that you should consider for you and your team:

- I Setup your calendar Default Time Zone
- II Share an email folder with a contact on your messenger team list.
- III Share a calendar with a contact on your messenger team list.
- IV Share your contact list with a contact on your messenger team list
- V How to create and use the Quick Action on a new email.
- VI How to use the Custom Fields.
- VII Configuring your tasks and how to assign a Task to a user.

I. Default Time Zone

When you initially login to UVC we recommend that you configure your calendar **Default Time Zone** as this will dictate the default "time" that will be indicated when creating task, appointments and/or meetings within UVC.

Click on File and then Options and Preferences:



Click on Calendar and then Time Zones.

On the right side of the screen you will be able to choose your **Default Time Zone** from the available drop down menu. Once you have made your selection click on the **OK** button to save your choice. Any future tasks and appointments you will create in your calendar will have a time stamp of your selected time zone.

Options and Preferences		×
General	🖄 Time Zones	
Messenger	Default Time Zone	
Contact	Label:	
Task	Time Zone: (GMT-05:00) Eastern Time (US & Canada)	
alendar Calendar	Show Additional Time Zone	
Calendar Options	Label:	
Time Zones	Time Zone: No Time Zone	~
Custom Fields		
Note		
🕺 Project 🌄 File Store		
The store		
		K Cancel

II. Share an email folder

In this second section we will **share an email folder** from *Alex's* Inbox with *AlexTest1* so that he can see Alex's emails under his own UVC application.

Sharing an email folder is useful because by default, for private and security reasons, UVC doesn't share your emails with other contacts (even if you share your contact list with them). If you do not want to share your main email Inbox our suggestion is creating a separate email folder where you will drag and drop emails that can be shared with other users. By sharing an email folder it will **also allow** other users to see the emails under the Journal Activity tab of the selected contact. The following procedure can be applied on any email folder you wish to share.

In this scenario we will enable the sharing option on the **UVC Shared Folder** located under *Alex's* inbox and add the user *AlexTest1* so that he can have the ability to see, edit and move any emails within that shared folder. There are **four steps** to enable the share option on an email folder.

(1) First right click on the email folder you want to share with this user. Then click on **Edit Folder**.

<u>Please take note</u> that in the screenshot below under the **UVC Shared Folder** there's a sub folder named **Shared Folder 22**. If you also want a new or existing contact to have access to a sub-folder then these **four steps** will need to be repeated again for that sub-folder.

O UVC - Universal Village Collaboration Suite				
File View Message Messenger Go Tools Windo	ow Help			
🗇 Create Message 🧳 Reply 🖾 Reply All	🥁 Forward 🍵 Move to Folder 🗆	🕽 = i 🌍 🔏 i р = i 🕅	👻 🚧 👻 🚰 Claim Ticket 🕴	🔍 Advanced Search 🛛 🤝
My Status Online Away Busy Invisible	🗐 Inbox 🧕 Contacts 🞢 T	asks 🚵 Calendar 볼 Notes 🔮	Projects 🛛 File Store	
Alex	My Inbox 🔻			
Alex	Message Folders	▲ 🚩 🊧 💡 🕡 🕬 Fr	om	Subject
	🗳 Inbox	Al	ex	Welcome message from
	💰 Outbox			
	≅⊠ Sent Items			
	► Drafts			
Right click on	📉 Templates			
the folder you want to "share"	🗑 Deleted Items			
want to share	Search Folders	Welcome messac	e from UVC	
	🖉 📄 UVC Shared Folder	New Folder	le nom ovc	
	🍺 Shared Folder 22	New Search Folder		
	🍺 Primus Business	Edit Folder)uvc.ca	
	Sharing folder with Joe	Delete Folder	re a must in today's changi	ng Wealth Management
	📄 TEST Email template folder	Edit Folder List	es and advisors as well as	leveraging the core featu
	🍺 Joe support emails	Customize Views/Search Folders		
	New Branches	Refresh		
	Stuff	L	1	

(2) Your second step is to make sure to check the option **Enable Sharing** and then click on the **Add User(s)** button.

🔿 Profile De	etail			×
You can vi	iew and edit the	following pr	references	
Description:	UVC Shared Folder			
	Color			
Enable Sh	aring			
Name		Access	Allow Private	Add User(s)
				Delete
			ОК	Cancel

(3) Your third step is to add a **check mark** next to the user that you want to share the email folder with and then select the **Access Level**.

Read Only access level will give the user a read only access. They will be able to read the emails and reply to them.

Full access level will give the user the ability to read, move, mark it as read or unread and delete the emails.

Again this is a matter or preference but usually **Full** access is preferred. Click on the OK button to apply your selection.

O User Permissions	×
You can specify the level of permissi	ons to give to this folder
Cccess Level: Read Only → Select Users Full ✓ ③ Alex Test1	
Ň	
	OK Cancel

(4) As seen below in this scenario I will be sharing the **UVC Shared Folder** with *AlexTest1*. Your fourth and final step is to click the **OK** button to confirm and save your changes.

🔿 Profile De	etail			×
You can vi	ew and edit the	following pref	erences	
Description:	UVC Shared Folder			
🗹 Enable Sh	aring			
Name		Access	Allow Private	Add User(s)
Alex Test1		Read Only		Delete
]
			ОК	Cancel

When *AlexTest1* logs in to UVC he will be able to see two different email **Inbox**. They will be accessible using the drop-down menu. One will be his own inbox (My Inbox) and the other is the one shared with *Alex*.

My Status Online Away Busy Invisible	🗐 Inbox 🧕 Contac	ts 🞢 Tasks 🖄 Calendar 🎽 Notes 🧐 Pr	ojects 🛛 🕵 File Store
	My Inbox 🔻		
AlexTest1 - Work Profile (Online)	My Inbox		
My Contacts	Alex	1970	
P My condicis		UVC	Welcome!
	🥌 Outbox		
	≓⊠ Sent Items		
	📏 Drafts		

When AlexTest1 selects the Alex inbox he will see the UVC shared Folder emails.

Inbox Contacts	🛫 Tasks 🗍 🛎 Calendar 🖌 🍊 Notes 🖌 🧐 Proj	ects 🛛 🌄 File Store				
Alex			¥	Quick Search	C Exclude Junk Show All Unread I	Flagged 🔻 Other 🔣 🔪
Message Folders 🔹	📂 🚩 📍 🕕 🏸 From	Subject	Received A	6	Size	
👸 UVC Shared Folder	Alex	Welcome message from UVC	Wed, Oct 21		651 bytes	^
	Welcome message from UVC					~
	From: Alex					
	To: alex@uvc.ca					HTML Plain All Headers
	Flexible solutions are a must in today's changing Wealth Management industry. Find out how PC uses our customizable and flexible solution to deliver the Collaborative CRM features across their branches and advisors as well as leveraging the core features needed for call center support and ticket management.					

As I explained above, under the UVC Shared Folder there's a sub folder entitled Shared Folder 22. If you also want a new or existing contact to have access to a sub folder then these 4 steps will need to be repeated again for that sub folder. Once you do, the user will be able to see the folder and any emails within that sub folder.

My Status Online Away Busy Invisible	Alex Contacts	🞢 Tasks 🛛 🛎 Calendar 📄 🏠 Notes 🖓 Projects 🕅	💺 File Store
AlexTest1 - Work Profile (Online)	Message Folders 🔹	🖭 🚧 💡 🕅 🧭 From	Subject
My Contacts	WVC Shared Folder Shared Folder 22	AlexUVC	UVC Alert: Birthday for: Janie Doe

III. Share a calendar

In section three we will explain how you can share your Calendar with a contact from your messenger list. This is a particularity important practice if another user books appointments for you with other clients or you simply want other users to see your available time so that they know when to book meetings with you.

The calendar sharing procedure needs to be configured under the **Calendar** view.

O UVC - Universal Village Collaboration Suite File View Calendar Messenger Go Tools Window Help 🛎 New Appointment 🕴 📄 Open 🚿 Delete 🗆 💬 Forward via e-mail 🚿 Print । 👘 🖛 I 🛛 Day 🛛 Week 🛛 Month 🖉 Day By User 🕴 📿 Find. 🥪 Show My Day ystatus Online Away Busy Invisible 🤤 Inbox 🔇 Contacts 🞢 Tasks 🎘 Calendar 🦄 Notes 🤹 Projects 💽 File Store My Calendar 🔻 👩 Alex 2015 🔹 🔪 🕇 Time 19 Monday October 2015 20 Tuesday October 2015 21 Wednesday October 2015 < October October 2015 All Day Sun Mon Tue Wed Thu Fri Sat 2 3 UT AN 4 5 6 7 8 9 10 11 12 13 14 15 16 17 08 🛲 18 19 20 **21** 22 **23** 24 25 26 27 28 29 30 31 09 AM November 2015 Sun Mon Tue Wed Thu Fri Sat 10 _{AM} Appointment with John Doe about TFSA 1 2 3 4 5 0 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 11 AM Categories/Tags: All Multi-Select Group By 🔻 12 PM Lunch meeting with Mary Show Live Calendars for 4 🔽 🏝 My Calendar 01 🖄 Calendar UVC Shared Calendar Tasks 02 _{PM} 🖻 🕑 🎓 Project Tasks Follow Ups 03 -

In this example we will be sharing the UVC Shared Calendar with AlexTest1.

0

There are four steps to follow to share your calendar with a contact from your list.

(1) First right click on the **Calendar** you want to share with this contact. Then click on **Edit Calendar**.



(2) Your second step is to make sure to check the **Enable Sharing** option and then click on the **Add User(s)** button.

🜔 Calendar	Detail			>
You can v	iew and edit th	e following pref	erences	
Description:	UVC Shared Cale	ndar		
	Enable Sync	🗹 Do not allow do	ouble-booking	
	Publish	Publish Detail		
	Background Co	olor Text	Color	
Enable Sh	aring			
Name		Access	Allow Private	Add User(s)
				Delete
			ОК	Cancel

(3) Your third step is to add a **check mark** next to the user that you want to share your calendar with and then select the **Access Level**.

Available Time level will only show the available time (busy or free) that you have under that calendar. No details will be shown on your busy time.

Read Only access level will just give them a read only access. They will be able to see the details of your appointments but no modification is permited.

Full access level will give the user the ability to read, modify and move the appointments and tasks to different locations.

Again this is a matter of preference but usually **Full** access is preferred. Click on the **OK** button to apply your selection.



(4) As seen below in this scenario I will be sharing the **UVC Shared Calendar** with *AlexTest1*. Your fourth and final step is to click the **OK** button to confirm and save your changes.



When AlexTest1 views their calendar they will also be able to see the Alex calendar once it's selected.

🖄 New Appointment 👘 Open 🚿 Delete	🛛 河 Forward via e-mail 🛛 🐳 Print 👔	Tay Week Month Day By User	🔍 Find 🛛 Show My Day	
My Status Online Away Busy Invisible	lnbox Contacts 20 AlexUVC ▼	Taskr 🛎 Calendar [Notes 🎡 Project:	s 💽 File Store	
AlexTest1 - Work Profile (Online)	Ctober 2015 € 2 Ctober 2015	Time 19 Monday October 2015	20 Tuesday October 2015	21 Wednesday October 2015
	<u>S M T W T F S</u> 1 2 3	All Day		
	4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	08		
	Categories/Tags:	09 _{AM}	•	
	Multi-Select Group By 🖛 Show Live Calendars for	10 AM		Appointment with John Doe about TFS#
	Weight My Calendar Weight Calendar Weight Calendar Tasks	11 ам		
	B Project Tasks Follow Ups	12 PM		Lunch meeting with Mary
	Alex	01 PM		

IV. Share your contact list

In this fourth section we will show you how to share your **Contact List** with another user that you currently have in your Messenger Contact list.

The contact sharing procedure needs to be configured under the Contact view.

In this example we will be sharing the Contact List from user AlexTest1 with IPC_testuser

There are four steps to follow to share your Contact list with a contact from your list.

(1) First click on **Share** button located on the upper right corner.

Con	acts	•						Categories/Tags: Al	I View: All Active V
pr	0	Name 🔻	Work Phone	Work Email	•	Birthday Date	Service Profile	Investment Knowledge	Contact Detail File Attachments Journal Activities
		Contacts						^	No Selection
	0	🕂 Bill Buchanan	(604)978-9797	bill@work24test.com	Holiday Cards	1-Jan-1975		Good	No Selection
	0	David Palmer	(416)566-8767 Ext 3000	david@work24test.com	Important	1-Aug-1975			
		nt Jack Bauer	(613)333-44444	jack@work24test.com	📋 📋 Insurance, Personal	1-Sep-1976			
		🖈 James Kirk							· · · · · · · · · · · · · · · · · · ·
	n	★ Michelle Dessler	(613)787-4545	michelle@work24test.com		1-Oct-1977			
		🛧 Renee Walker	(403)898-9090	renee@work24test.net		1-Nov-1978			
	n	★ Tony Almeida	(514)909-8787 Ext 2009	tony@work24test.com		1-Dec-1979			

(2) Click on the Add User(s) button to add the user of your choice.

Options and Preferences				×
Contact Contact Sharing	Contact Sharing			
	Name	Access	Allow Private	Add User(s) Delete

(3) Select the user by clicking the box next to their name. In this case I will select *IPC_testuser*. Then select an Access Level. We recommend FULL access. Click the OK button to save your changes.



(4) Review your configuration and click on the **OK** button again to confirm.

Contact	🦉 Contact Sharin	g		
Contact Sharing				
	Name	Access	Allow Private	Add User(s
	IPC Test User	Full		Delete

(5) The user that you are now sharing your contact list with will now have access to your contacts by clicking on the drop down menu next to My Contacts.

🔵 Inboy Conta	acts 🛛 🖄 Tasks 🛛 🖄 Calenda	r [🍐 Notes 🛛 😤 Projec	ts 🛛 😡 File Store				
My Contacts 🔻 🗲						Quick Search	Categories/Tag
All 🕕 Name	Service Profile	Birthday Date 🔻	Home Phone	Work Phone	Cell Phone	Email	•
A D Contacts							
BC							
	rrr	r r	Ϋ́́ο Ι				
🔵 Inboy 🖉 Contac	cts 🛛 🞢 Tasks 🛛 🖄 Calendar	r [💧 Notes 🧏 Projec	ts 🛛 😼 File Store				
Inbor 🦉 Contact Ny Contacts 🔻	cts 🚰 Tasks 🚢 Calenda	r 칠 Notes 🧏 Projec	ts 🛛 🕵 File Store			Quick Search	Categories/
Iy Contacts ▼ Iy Contacts	cts 🛛 🚰 Tasks 🛛 🐣 Calenda	r 🚵 Notes 🧏 Projec	ts 🛛 🗱 File Store			Quick Search	Categories/
1y Contacts 💌	cts 🔄 Tasks 🔌 Calenda	r 🎽 Notes 🧏 Projec	ts Store File Store				

(6) Once they select this contact list they will see all its co

exT	est1 🔻						Quick Search	Categories/Ti
0	Name	Service Profile	Birthday Date 🔻	Home Phone	Work Phone	Cell Phone	Email	•
	4 Contacts							
	ᄎ Kirk, James						test@test.com	
0	Buchanan, Bill		1-Jan-1975	(604)777-7777	(604)978-9797		bill@24test.com	Holiday Cards
n	Palmer, David		1-Aug-1975	(416)343-0909	(416)566-8767 Ext 3000			Important
	Bauer, Jack		1-Sep-1976	(613)777-6644	(613)333-44444			Insurance, Personal
0	🖈 Dessler, Michelle		1-Oct-1977	(613)888-7766	(613)787-4545			
	🕂 Walker, Renee		1-Nov-1978	(403)565-8888	(403)898-9090		renee@24test.com	
0	Almeida, Tony		1-Dec-1979	(514)799-9090	(514)909-8787 Ext 2009		tony@24test.net	

V. How to create a Quick Action

In this fifth section we will be explaining how the **Quick Action**, located on the **Create Message** window, is a particularly useful option which will let you move an email to a specific folder once it's been sent successfully. Instead of moving new emails form one folder to another the Quick action option will simply do it for you.

To create a new **Quick Action** please follow these steps: Go to **File** and **Options and Preferences**. Click on **Messenger** and then **Quick Actions**. On this window screen you can click on **New Action** to create your new quick action.

General	Quick Actions		
Messenger			\frown
Public Profile	Action Name	Shortcut	New Action
A Privacy			Delete
Account Setup			
Messenger Options			Edit
Message Options			A 5
Message Folders			
Chat Window			
Signatures			
Rules and Filters			
Emoticon Themes			
Kacation Responder			
Safe Senders			
Quick Actions			
Media			
Contact			
🕈 Task			
Calendar			
Note			
Project			
File Store			

You will be brought up to a screen where you will need to enter an Action Name.

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

You can select any of the available actions from the drop down menu under **Perform these actions**. On the right side you will need to select the folder for which this quick action will be applied.



Action Name: Move email to UVC Shared Folder	Shortcut: Example: Ctrl+Q 1
Perform these actions:	🗙 Delete New Action
Move Message To Folder Select folder to apply this quick action	UVC Shared Folder Inbot Inbot Inbot Incon
	OK Cancel

You can add as many actions as you want to a single **Quick Action**. Simply click on the **New Action** button to add a new action to your **Quick Action**.

Action Name: Move email to UVC Share	Folder Shortcut:	
	Example: Ctrl+Q 1	_
erform these actions:	💥 Delete 🛛 New A	ction
Move Message To Folder	UVC Shared Folder	
Flag for Follow up		

Click on the **OK** button to save your **Quick Action**. When you create an e-mail and select a **Quick Action after Send** it will be applied automatically.



Take note that **Quick Actions** are also available under your Email view screen. This is particularly important if you constantly repeat a task on that screen. The task can now be simplified by selecting a Quick Action from the drop down box seen below.

 O UVC - Universal Village Collaboration Suite File View Message Messenger Go Tools Window Help ✓ Create Message ✓ Reply ✓ Reply All ✓ Ferrit 	orward 🎬 Move to Folder 💁 👻 🍯 🚿 👖	😽 🔹 🕅 👻 🚰 Claim Ticket	Advanced Search 🛛 🐼 Show My Day
My Status Online Away Busy Invisible Alex My Cont	Inbox Contacts Tasks & C My Inbox Tasks & C Message Folders Outbox Outbox Sent Items Defets Templates Deleted Items Search Folders UCS Shared Folder	Move email to UVC Shared Folder Primus business folder Edit Quick Actions	

VI. How to use the custom fields

In this sixth section we will explain how the **Custom Fields** can benefit the way you work on a daily basis by capturing/inserting information you judge to be essential to your business.

Custom Fields can be created under the the Contact, Task, Calendar, Note or Project view.

General	Custom Fields		
Messenger			New Tab
Media	Name	Field ID	
	Contact - Custom Fields TEST		New Field
Contact 🔶	Text Field - test	72853-1	Delete
Contact Options	Number Field - test	72853-2	
Custom Fields	Email Field - test	72853-3	Edit
Contact Sharing	URL Field - test	72853-4	Preview
Task 🔶	Phone Field - test	72853-5	
Calendar 🔶	Date Field - test	72853-6	- ÷ - ÷
Calendar	Date Time Field - test	72853-7	
Note 🔶	Editable Drop Down - test	72853-8	
Project	Drop Down - test	72853-9	
Project	Check Box - test	72853-10	
File Store	Check Box Options - test	72853-11	
	Radio Button Options - test	72853-12	

The most common and useful place to add custom fields would be under the Contacts view. But as mentioned above you can also create these custom fields under the Task, Calendar, Note or Project view. Below we will explain how to create some custom fields under Contacts.

Under **Options and Preferences**, select **Contact** and make sure to click on **Custom Fields**. Then click on **New Tab** to create a tab which will be seen under all your contacts. In this example I will name it **KYC Info**.

General	Custom Fields		
Messenger			
💁 Media	Name	Field ID	New Tab
Contact	Contact - Custom Fields TES	T	New Field
Contact Options			Delete
Custom Fields			Edit
Contact Sharing	Create	and name	Preview
Task		"tab" in this	\ \
🔄 Calendar	se	ection	• •
Note			
Project			
File Store			

Once you have created your new tab you are ready to add a **New Field** within the highlighted tab. Make sure that you have selected your new tab and then click on the **New Field** button. You will see the **New Custom Field** window pop-up.

This is the window which will allow you to create endless possibilities of custom fields to your new or existing tab.



First you will need to enter the **Description** of your new field and the **Type**.

The **Type** drop down menu will let you choose between all sorts of input methods for your new field. Click on the **OK** button to save your new field.

🜔 New Custo	om Field	×
Description:	Income	
Туре:	TextField	~
\smile	TextField	
Field Width:	NumberField	
	EmailField	
	URLField	
	PhoneField	
	DateField	
	DateTimeField	
	Editable DropDown	
	DropDown	
	CheckBox	
	CheckBox Options	
	RadioButton Options	
Field ID	72853-13	
	ОК	Cancel

In my example I will create Income, Net Worth, Investment Knowledge, Investment Experience and Investment Objective fields.

For my Income field I will be selecting the **Type -> Radio Button Options**.

You will notice that for some field types you will have the possibility to add options (radio buttons, check mark or drop down menu).

To add more options click on the + symbol.

🚫 New Custo	om Field X
Description:	Income
Туре:	RadioButton Options 🗸
Field Width:	
	Layout Field in Next Column
	Do not include field on printouts
	Name +
	Under \$25,000 -
	\$25,000 to \$49,000
	New Field
Field ID	72853-13
	OK Cancel

You can also align your fields the way you want. If you want you can click on the **Layout Field in the Next Column** to move the field to the right.

🔿 New Cust	om Field X
Description:	Income
Туре:	RadioButton Options \sim
Field Width:	
	Layout Field in Next Column
	Do not include field on printouts
	Name + \$100,000 to \$124,000 - \$125,000 to \$199,999
	\$200,000 to \$999,999 \$1 million and over
Field ID	72853-13
	OK Cancel

You can also move the fields **Up** or **Down** to change the visual layout on the fields that will appear under the tab. In this scenario I will be moving the Investment Knowledge below Net Worth – Liquid Assets and make sure that it has the **Layout Field in the Next Column** checked so that it appears to the right of Net Worth – Fixed Assets.

General	🤇 Custom Fields			
Messenger				New Tab
Media	Name		Field ID	
Contact	Contact - Custom F	ields TEST		New Field
	A KYC Info		72052 42	Delete
Contact Options	Income		72853-13 72853-14	Edit
Contact Sharing	Net Worth - Liquid / Net Worth - Fixed A		72853-14	
Task	Net Worth - Fixed A Net Worth - Liabiliti		72853-16	Preview
	Net Worth - TOTAL	-	72853-17	🚺 🗘 🔸
Calendar	Investment Knowled	dge	72853-18	
Note	Investment Experier		72853-19	
Project	Investment Objectiv	/e	72853-20	
	New Custo		×	
File Store	O New Custo	om Field	×	
	Description:	Investment Knowledge		
	Type:	DropDown	~	
	Field Width:			
		Layout Field in Next C	olumn	
		Do not include field or	n printouts	
		Name	+	
		Sophisticated	^ -	
		Good		
		Fair	-	
		Novice	· · ·	
	Field ID	72853-18		OK Canc

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

Now when you create or edit a contact you will see your new tab. Under that new tab you will see the fields you have created.

8 Tony Stark - Contact		×
File Edit Format Attachment Tools Window Help		^
🔜 Save and Close 🔜 Save 🧳 🔀 🦪 🗊 🗊 👘 🕈 👘 Follow Up		
inked Categories: Personal		_
Seneral Home Business Personal/Mobile Other Journal Activities Contact - Custom Fields TEST (KYC Info		
KYC Info		
Income		
○ Under \$25,000 ○ \$25,000 to \$49,000 ○ \$50,000 to \$74,999 ○ \$75,000 to \$99,999 ○ \$100,000 to \$124,000 ○ \$125,000 to \$199,999 ○ \$200,000 to \$999,999 ○ \$1 million and	over	
Net Worth - Liquid Assets: Investment Knowledge		
Net Worth - Fixed Assets: Good		
Net Worth - Liabilities: Fair		
Novice		
Investment Experience		
Bonds Mortgages Stocks Mutual Funds Term Deposits Real Estate		
Investment Objective		
Safety Income Balanced Growth Speculation		

VII. Creating tasks

Our recommended best practice for **Tasks** is to create them if you want another user in your team to take ownership of them. **Tasks** are assigned to other users. Appointments on the other hand are created when they are time specific.

By default your **Tasks** are shown on your calendar 7 days before they are due.

If you wish you can remove this view from your Calendar Module.

To remove this option click on View and Task View Options.

On the option screen make sure the option Start Showing Tasks 7 Days Before Due is not checked.



Another best practice is the assignment of tasks to other users. This is particularity useful when you want another user to take ownership of a task you created.

You can assign a task to a user within your team from either the **Contact Module** or the **Task Module** screen. The preferred method is through the **Contact Module** screen as it will "link" the task directly to the contact.

In your **Contact Module** screen simply right click on your contact and select the option **New Task for Contact**.

11	Name 🔻	Work Email	Work Phone		¢
A	Contacts				
в	🕨 🥂 Business Clients				
с	At Clients				
D	4 🥂 My test clients				
E	🦟 Miss Janie Doe	janie.doe@workemail.com			
F	📌 Mr John Doe	john.doe@workemail.com	(613)222-4141 E	xt 1002	
G	🕂 Mr Tony Stark	New Contact	Ctrl+N		
H		New Group	Ctri+N	t 0011	
1		Open			
_		Delete			
J		Delete		t 1002	
к		Manage groups/relationships for	contact		
L		Show All Contacts		£0011	
м		Display and Sort Name by		>	
N		Group By			
0					
P		Write an e-mail		>	
Q		Call Contact		>	
R		Move to		>	
s		Copy to		>	
T		Categories/Tags	Ctrl+T		
_		Follow Up			
U					
v		Forward VCard			
N		Export to Excel (csv)			
x		Print			
Y		Journal Activities			
z		New Task for Contact			
		New Appointment for Contact			
		New Note for Contact		1	
		New Project Task for Contact		1	

Automatically you will see that this new **Task** will be "linked" to the client you selected.

🛃 Untitled - Task		-	\times
File Edit Format Attachment Tools Window Help			
📊 Save and Close 📊 Save 🐗 🚿 📌 🗊 📋 🔞 👳 👘 👻 🥀 Contacts			
Linked Contacts: Mr Tony Stark			
General Details 😪 Alert 📿 Repeat			
Subject:	Status:	In Progress	~
Start Date: 28-Oct-2015 🕘 No Time 🗸			
Due Date: No Time V No due date			
Folder Group: Alex Blanchet v Task Folder v	Priority:	Normal	\sim
18thCentury 🗸 8 🗸 🕄 B I U 📑 🕏 🗐 🗄 🗄 🗄			
			^

If you would rather create tasks under the **Tasks** screen just remember to "link" it to the client. Click on the **Contacts** button located on the top and select the contact which it should be linked to. Use the arrow to link the selected contact. Click the **OK** to save.

Dinbox Contacts	🍸 Tasks 🍓 Calendar 🚺 Notes 🇌 Pro	jects 💽 File Store	
My Tasks 🔻			
Current View	🗹 🕅 Subject	Priority	Due Date 🔮
Active tasks	🖉 Untitled - Task		
All tasks	File Edit Format Attachment Tools Window I	Help	
Active + On hold	📊 Save and Close 🔚 Save 🐗 🚿		X Contacts
Next 7 days	ave and close and save and close		Contacts
Overdue tasks	General Details < Alert 🔾 Repeat		
Completed tasks			
Туре	Subject:		Status:
Short term Long term			
Assigned tasks (Owner)	Start Date: 28-Oct-2015 🛎 No	lime 🗸	
Categories/Tags:	Due Date:	lime 🗸 🗹 No due date	
All ~			
	Folder Group: Alex Contacts		× Priority
	18thCentury My Contacts V Quick S	earch 🔍 All Active 🗸	
Multi-Select	Select Contacts		
Show Live Tasks for	Tag all Untag all		
🖉 🔯 My Tasks	Trony Stark	Mr Tony St	ark
🖌 🔯 Assigned Tasks			
Task Folder Task Folder TEST1			
Project Tasks			
Project Tasks			
		¥	
			OK Cancel

This "link" is important so that it can be historically kept under the contact's **Journal Activities** information tab.

Tony Stark - Contact				_	×
File Edit Format Attachment Tool	ls Window Help				
Save and Close Save	🐳 🔏 😥 🗊 🕅 👘 🕶 🊧 Fo	llow Up			
Linked Categories: 🌔 Personal					
General Home Business Personal	/Mobile Other Journal Activities Contact - Custom Fields T	EST KYC Info			
Journal Activities	🚰 New Task 🛞 New Appointment 🎽 New Note 😁		One-line View Multi-line View Vie	ew: All	
Open Send E-mail		New Project Task	One-line view Multi-line view Vie	ew: All	~
Туре	Description	Date 🔺	Status	Owner Name	
🚩 Task	Yearly meeting	27-Oct-2016	In Progress	Alex	
Task	Semi-annual phone call	27-Apr-2016	In Progress	Δlev	
🚩 Task	Update KYC	Today	In Progress	Alex	
Appointment/Event Birthday	Birthday for: Tony Stark	8-Aug-1975	None	Alex	
11					

To assign your task to a user on your team click on the **Details** tab within the task window. Select the user from the **Assign Task To The Following Users** section.

We recommend that you check the option **Send a new task assigned notification message** option. This option will automatically send an e-mail notification message to the selected user in their inbox.

We also recommend that you select the option **Allow assignee to modify all fields including due date** option. This option will enable the assigned user to edit/modify the task in its entirety. This is the preferred option.

If this specific option is not checked the assigned user will only be able to change the status and add notes to the task.

🛃 Update KYC - Task	-	×
File Edit Format Attachment Tools Window Help		
🔜 Save and Close 🔚 Save 🦃 💢 📌 😏 🗈 🕕 🕸 👻 🕅 👻 🤾 Contacts		
Linked Contacts: Mr Tony Stark		
General Details 📢 Alert 🔓 Repeat		
Details		
Date completed: Con Hold Until Date:		
Created Date: 28-Oct-2015 11:58:10 AM Modified Date: 28-Oct-2015 11:58:10 AM		
Created By: Alex Blanchet		
Total Work: 0 minutes		
Actual Work: 0 minutes		
% Complete: 0 🔹 %		
Send a new task assigned notification message		
Assign Task To The Following Users		
D My Tasks ∀ ≜ AlexTest1		
M W Alex rest		
A did up out a) for my dide. Up to		
Add user(s) from this list.		
File under: Short Term Long Term		

Once the assigned UVC user receives the e-mail notification message they have the ability to **Open** the task.

Forward 🍵 Move to Folder	S, = 🧇 🔏 🏊 = 🕅 = 🎉	Claim Ticket	rch 🛛 😴 Show My Day					
🗐 Inbox / Contacts	🞢 Tasks	ojects 🛛 🔩 File Store						
My Inbox 💌					VQuick Search	C Exclude Junk Show All Unread	Flagged 👻 Other	< ک
Message Folders 🔹	📂 🚩 📍 🖲 Þ From	Subject		Received v	•	Size		
🛶 Inbox 🚺	UVC	Welcome!		Thu, Oct 22		0 bytes		^
💰 Outbox	AlexUVC	New Task Notification		Today 12:48:25 PM		166 bytes		
i Sent Items								
▶ Drafts								~
📉 Templates								-
Deleted Items	New Task Notification							
Rearch Folders	From: 🔹 AlexUVC							
	To: 🕹 <u>Alex Test1</u>						HTML Plain All Hea	ders
								-
	You have been assigned a new task from Ale							
	Update KYC (Mr Tony Stark) - Please go to yo	ur task module to get additional details.						
	Open							
			,					

The owner of the task will be able to view their assigned task in their own **Task** view tab under the **Assigned Tasks** folder.

rard via e-mail 🛛 🗳 Print 👘 👻	🛃 Detail Pane 🔍 Advanced Search	🤝 Show My Day		
🗐 Inbox / 🖉 Contact	🎢 Tasks 🛎 Calendar 🍐 Notes 🧃	😤 Projects 🛛 🕵 File Store		
My Tasks 🔻				
Current View	🗹 🕅 Subject	Priority	Due Date	
Active tasks	🗹 Click here to create a quick t	ask		
All tasks Active + On hold	▲ No due date			
Next 7 days	📂 Update KYC	Normal		
Overdue tasks				
Completed tasks				
Туре				
Short term Long term				
Assigned tasks (Owner)				
Categories/Tags:				
741				
Multi-Select				
Show Live Tasks for				
✓ My Tasks ✓ My Assigned Tasks				
Task Folder				
🗌 🧐 Project Tasks				

In your **Calendar Module** when you select the **Task** folder under the **Show Live Calendars for** section you will be able to see your assigned tasks on the top of the specific Start Date or Due Date.

Please note that by default the two rules for task showing on your **Calendar Module** are:

- Tasks with a Start Date and but <u>no</u> Due Date will appear on the Start Date.
- Tasks with a Start Date and a Due Date will appear only on the Due Date.

🗐 Inbox 🚺 Contacts 🚮	lask 🛎 G	alendar 🛛 🔔 Notes 🛛 🧐 Proje	cts File Store			/
Ay Calendar 🔻						Show Hidden Days Sha
	Time I	26 Monday October 2015	27 Tuesday October 2015	e 28 Wednesday October 2015	29 Thursday October 2015	30 Friday October 2015
October 2015 s m T w T F s 1 2 3	All Day			Oct 30 Mr Tony Stark - Call client to con Mr Tony Stark - Update KitC	nfirm as	Mr Tony Stark - Call client to confirm assets
4 5 6 7 8 9 10 1 12 13 14 15 16 17	06 _{AM}					
8 19 20 21 22 23 24 5 26 27 28 29 30 31	07 🛲					
ategories/Tags: III v	08 _{AM}					
Multi-Select Group By Tow Live Calendars for My Calendar	09 _{AM}					
Calendar	10 AM					

But these task view default options can be configurable under **View** and **Task View Options**. It's a matter of preference and what best works for you.



Take note that once you have assigned a task to another user if you want to make changes to that task make sure to search and edit the task under your own **Task Folder** and have the **Assigned Task** (owner) option selected. If you do not select this option any assigned task will not show up on your **Task Folder**.

🔋 Inbox Contacts 🚩	Tasks 🏼 🏝	Calendar 🔔 Notes 🇌 Projects 🌆	File Store						
/ Tasks 💌								Search 🔍	Sh
rent View	e	Subject	Priority	Due Date	•	Status	Linked Contacts V	Task Recipients	
ve tasks		Click here to create a quick task							
sks		October 2015							
e + On hold		Overdue tasks							
7 days		4 This Week							
lue tasks		C							
oleted tasks		Call client to confirm assets	Normal	Fri, Oct 30		In Progress	Mr Tony Stark	AlexTest1	
Short term Long term		Later Than Next Week							
		A No due date							
isigned tasks (Owner)	V	📂 test6	Normal			Completed			
gories/Tags:	- V	T test task 1	Normal			Completed	Alex Blanchet		
	~	New tats 2	Normal			Completed	Alexandre Blanchet		
		mew task 5	Normal			Completed	Jean-Anne		
	- (🖻 Input KYC form	Normal			Cancelled	Mr Tony Stark	AlexTest1	
Multi-Select		📂 Update KYC	Normal			In Progress	Mr Tony Stark	AlexTest1	
Live Tasks for	- V	📂 This is a new task 8 - test	Normal			Completed	Tony Stark		
My Tasks									
V D Task Folder									
Shared Task Folder									

We recommend that you also add the header **Task Recipients** to the Task view (as seen below) so that it's easier for you to know who the assigned user is for each task.

Simply right click on an existing header to see the sub-menu and select the option Task Recipients.

lnbox 🧕 Contact	🞢 Tasks 🖄 Calendar [🍐 Notes 🎡 Proje	cts 🛛 🛃 File Store					
My Tasks 🔻						Quick Search	Share
Current View	🕑 🖲 Subject	Drineite	Due Date	•	Status 🔺	Task Recipients	
Active tasks All tasks Active + On hold Next 7 døys Overdue tasks	Click here to create a quick task Overdue tasks Task test Task - for AG-8900 needs to be sign	Completed Subject Priority Start Date Due Date Categories/Tags	Tue, Jan 12 Mon, Feb 1		in Progress in Progress		_
Completed tasks Type Short term Long term Assigned tasks (Owner)	E" Please call Ron E" Review website E" Review Jack's TFSA 4 No due date	Categories rags Linked Control Task Recipients Status % Complete Complete	6-Nov-2015 21-Dec-2015 4-Nov-2015		In Progress In Progress In Progress	AlexTest1 AlexTest1 AlexTest1	
Categories/Tags: All	 Welcome! RE: UVC - training today at 2PM Test 44 	Last Modified Alert File Attachments Total Work Actual Work			In Progress In Progress In Progress	AlexUVC AlexTest1 UVCTest1	
Multi-Select Show Live Tasks for My Tasks M Tasks Gr Task Folder Task Folder Presonal Tasks Project Tasks		Days Overdue Auto resize columns to fit width Manual Sorting Add Custom Field Remove Custom Field >					