universal village software

What's New - UVC Version 7.96

Enhancements version 7.96

1. The clients email addresses from IPC backoffice are automatically integrated into the UVC email module.

2. A new client holdings panel is added to the contact screen that will show the client's holding if UVC detects the contact to be a client. (See *Figure 1*)
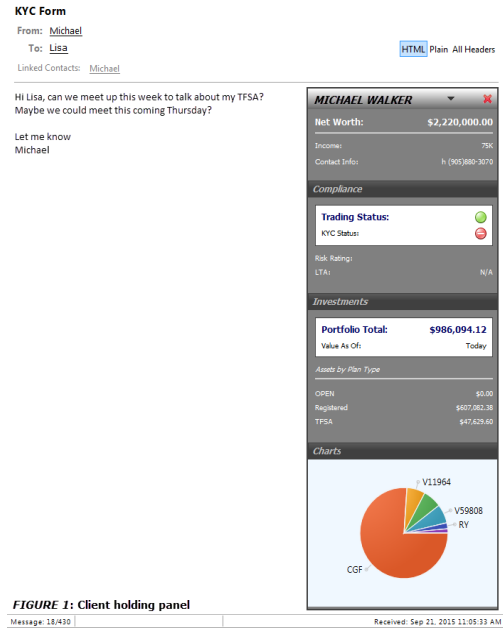

FIGURE 1: Client holding panel

3. Clients tab is added that lists clients available in MFDA and IIROC back office systems. (See *Figure 2*)

Figure 2: MFDA and IIROC Client tab

4. A new detailed client window will show all information about a client including investments. (See *Figure 3*)
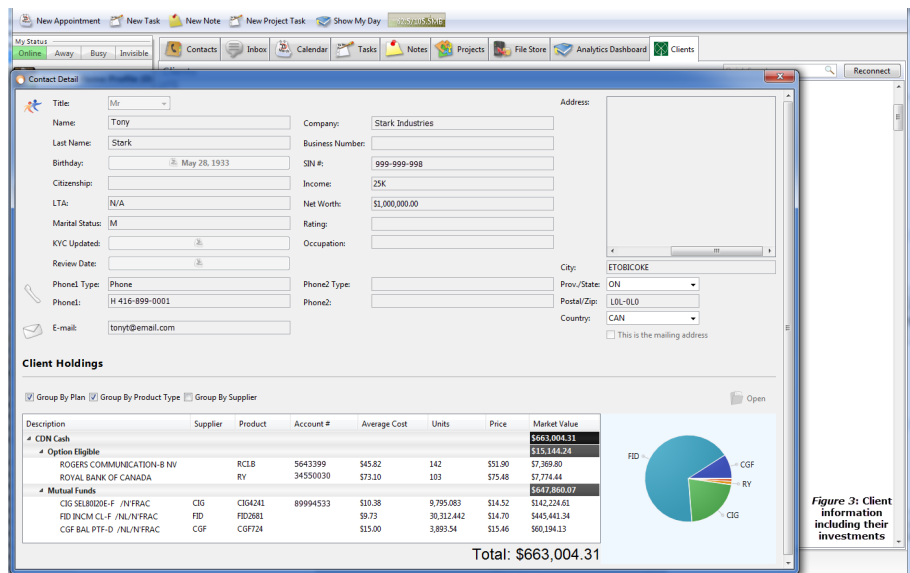

Figure 3: Client information including their investments

5. Performance improvements when working with shared mailbox folders.

6. You will have the ability to link tasks, appointments and notes to back office clients directly without the need to add that client to your contacts list.

Defect Corrections

1. Group parent is now also added to client list when filtering by Group.

2. Quick actions and filter actions didn't always save changes made to the setup screen.

3. Not able to add additional users to default shared calendar.

4. Forwarding emails not including attachments when image signature is used.