

What's New – UVC Version 8.00

Enhancements version 8.00

1. Added New Categories/Tags header to Journal Activities and ability to filter by Tags.

S Jack Bauer - Contact				-	- 🗆 X				
File Edit Format Attachment To	Sols Window Help	🕕 🔹 🚧 Follow Up				One-line View Mu	Iti-line View Type	: Appointmen View: All	~
	ervice Profile,Important,Silver Clients Journal Activities Misc. Contact Info	mation VVC late founds doub	A deces (ether)				Status	All Appointment/Event	
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🌔 Open 🔗 💅 兽	🔔 🌌 🔍 Quick Search	One-line View	Multi-line View Type: All	View: All	~			Invoice Email	
Type Ef Task ▲ Appointment/Event Birthday	Description Quaterly calls Birthday for. Jack Bauer	Categories/Tags	Date A V Type V Description V Date V Status Owner Name File Attachments V Categories/Tags V Auto resize column Reset Sort Order	Status pleted				AA Service Profile AAA Service Profile Client Gold Clients Gold Clients Holday Cards Important Insurance Inscriptional Miscellaneous Personal Silver Clients	
					Categories/Tag	gs: All ill File Attachments		/iew: All Active ~	Share
Complete rea	design of Con	tact Detail p	anel on the	right of		Develop 1	dish alla		

2. Complete redesign of Contact Detail panel on the right of the contact list to make it easier to see all relevant information about the client.

	Manager of Oper	Corp. ations	
Personal Contact De	etails	Phone Numbers	
Birthday:	1-Oct-1977	Home Phone:	<u>(613)888-7766</u>
Age:	38	Business Phone:	(613)787-4545 Ext
service Profile:	AA Profile	Fax Numbers	
Review Date:	4-Dec-2015	Business Fax:	(613)222-3434
Display Name:	Michelle Dessler	Emails	<u></u>
inked Categories:			
Created by:	UVC Test1	Email: Home E-mail:	michelle@24test.net
Home Address		Home E-mail: Bus Email:	michelle@home24test.ca michelle@work24test.com
Mailing Address			michelle@work24test.com
35 Antares Drive, Su	iite 200	Custom Fields	
Ottawa, ON		Number of depen	idants: 0,4
CANADA K2E 8B1			
Show on Map			
Business Address			
1234 Spy Avenue			
Ottawa, CANADA K	3K6M8		
Show on Map			

- 3. Number of new messages on shared folders are now tracked in real-time.
- 4. System automatically opens parent ticket task on email replies when clicking on New Task for Email menu or icon on the left.

5. Redesign of Contact Edit window by moving many of the fields to the main tab. Also removed Personal/Mobile tab and merged the information to the General tab.

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File Edit		nt Tools Window Help					
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Linked Ca	ategories: 🧴 🗛	Service Profile					
General	Home Business C	Other Journal Activities Misc. Contact Information KYC Info favorite d	rink Adress (oth	er)			
t	Title:	· · ·	File under:	Business v			
	Name:	Michelle	Middle:				10
	Last Name:	Dessler	Nickname:				
	Display as:	Michelle Dessler 🗸	Service Profile:	AA Profile			
	Company:		Review Date:	4-Dec-2015	6		
	Occupation:		Birthday:	1-Oct-1977	(3	6	
		Contact is a Link/Group	Create birth	day event in caler	ndar	Display -	
	E-mail: 🔻	michelle@24test.net	Primary	□ Inactive		_	Information
2	Home E-mail: 💌	michelle@home24test.ca	Primary	□ Inactive			ss Information
	Work E-mail: 💌	michelle@work24test.com	Primary	□ Inactive		Other 🗹	Detail
		Additional Email					
			Country Code:				
	Owner:	UVC Test1 V	Mobile Phone: Direct:				
		Private	Direct:	Change Phone 1	Femplate		
18thCen	tury	✓ 8 ✓ € B I U = = = = = 1	= == •= •				
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		~					

6. Added the ability to hide the Business or Home tabs for a contact as well as the ability to default the option for newly created contacts.

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Linked Ca	itegories: 📋 🗛	Service Profile								
General	Home Business C	ther Journal Activiti	es Misc. Contact Information	KYC Info favorite	e drink Adress (o	ther)				
K	Title:	~			File under:	Business v	Г			Î
	Name:	Michelle			Middle:				<u>.</u>	
	Last Name:	Dessler			Nickname:			5		
	Display as:	Michelle Dessler		~	Service Profile:	AA Profile	\sim		<u>, </u>	
	Company:				Review Date:	4-Dec-2015	6.			
	Occupation:				Birthday:	1-Oct-1977	æ			
		Contact is a Link/	Group		Create birth	day event in calendar		isplay —)
	E-mail: 💌	michelle@24test.net			Primary	Inactive		Home Info		
	Home E-mail: 💌	michelle@home24te	ist.ca		Primary	Inactive		Other Deta		
	Work E-mail: 💌	michelle@work24te	st.com		Primary	Inactive				
		Additional Email			Country Code:					
	Owner:	UVC Test1	~		Mobile Phone:					
					Direct:					
		Private				Change Phone Template				
🔿 Opt	tions and Preference	es								×
×.	General		Contact Opt	ions						
9	Messenger		Options							_
2	Media		Font size:	Small					~	. I
0	Contact								~	
4	Contact Options		Default type:	Personal					~	1
	Custom Fields		Grid style:	Both				~		
	Contact Sharing Task		Default Contact Add	ress Types						
(22)			Home Busi							
100 C	Calendar									
-	Note		Detailed View backgro	und color:						
🤹 F	Project		Default address book:	None					~	
1 Rus F	File Store									
-										

7. You can now add up to 6 emails to a contact and track email history on them.

/ Mich	nelle Dessler - Contac	t				-		×
File Edit	Format Attachme	nt Tools Window Help						
Sav	ve and Close 🛛 📊 Si	ave 🗳 🕺 📌 🗊 🗋 🕅 🏚 🕶 🊧 Fol	low Up					
Linked Ca	ategories: 🧂 🗛	Service Profile						
General	Home Business C	Other Journal Activities Misc. Contact Information KYC Info favorite	e drink Adress (o	ther)				
*	Title:	~	File under:	Business ~	ſ			٦Î
	Name:	Michelle	Middle:				~	
	Last Name:	Dessler	Nickname:			. X.		
	Display as:	Michelle Dessler ~	Service Profile:	AA Profile	\sim			
	Company:		Review Date:	4-Dec-2015	<u>66</u>			- 1
	Occupation:		Birthday:	1-Oct-1977	2			
		Contact is a Link/Group	Create birth	day event in calendar		Display		- 1
Ø	E-mail: 🔻	michelle@24test.net	Primary	Inactive		Home Info		
	Home E-mail: 💌	michelle@home24test.ca	Primary	Inactive	1	✓ Other Deta	nil	
	Work E-mail: 💌	michelle@work24test.com	Primary	Inactive				
	\rightarrow	Additional Email	Country Code:					
	Owner:	UVC Test1 V	Mobile Phone:					
		Private	Direct:	Change Phone Template				

8. Redesigned the Journal Activities panel to include the ability to search and to filter by type.



9. Ability to specify a Default Task List and Default Note List to use when creating new tasks from the journal activities.

General	Task Options	
Messenger	Options	
💁 Media	Font size: Small V Grid style: None	~
Contact	Default Status: In Progress V	
🝸 Task	Default new task to: None	
 Task Options Task Folders Custom Fields 	Background color: Overdue background color: Overdue tex	t color:
Calendar	Enable alert and default to 0 🗣 Minutes before event due time	
🔦 Note	Default to 'No due date' for new tasks	
Project	Assigned Tasks	
lie Store	Send status update when task is completed Send status update when task is modified Send status update when task assigned notification message'	
	Deduit to serie a new task assigned notification message Allow assignee to modify all fields including due date	
	Allow assignee to modify all fields including due date	
Options and Preferences	Allow assignee to modify all fields including due date	
General Messenger	Allow assignee to modify all fields including due date Note Options Options	
General Messenger Media	Allow assignee to modify all fields including due date Note Options Font size: Small Grid style: None	~
General Messenger Media Contact	Allow assignee to modify all fields including due date Note Options Options	v .
General Messenger Media Contact Task	Allow assignee to modify all fields including due date Note Options Font size: Small Grid style: None	~
General Messenger Media Contact	Allow assignee to modify all fields including due date Note Options Font size: Default Status: None Default Note color: White	v .
General Messenger Contact Task Calendar Note	Allow assignee to modify all fields including due date	
General Messenger Media Contact Task Calendar Note	Allow assignee to modify all fields including due date Note Options Font size: Default Status: None Default note color: White Background color: Note Type Description	v New Note Type
General Messenger Contact Task Calendar Note Note Gustom Fields	Allow assignee to modify all fields including due date Note Options Font size: Small Offault status: None Default Status: None Background color: Note Type Description Client Notes	
General Messenger Media Contact Task Calendar Note	Allow assignee to modify all fields including due date Note Options Font size: Default Status: None Default note color: White Background color: Note Type Description	New Note Type

10. Ability to default new notes to a specific Status.

Options and Preferences					
General	🔔 Note Optio	ons			
Messenger	Options				
🧕 Media	Font size:	Small ~	Grid style:	None	~
Contact	Default Status:	None	Default note color:	White	
Task Task	Default note list:	None Pending			
Calendar Note	Background color:	Partially Done Completed			
Note Options	Note Type Description	On Hold Cancelled			New Note Type
Custom Fields	Client Notes				Delete
Note Sharing	Websites				Rename
🔮 Project	Follow Up				Kename
💑 File Store	Reference				

12. Option to disable automatic "reading" of emails, there is currently only an option to increase time.

Options and Preferences		×
Seneral	Dessage Options	
Messenger	Message Options	-
Privacy	Message body font size: Small	~
Account Setup Messenger Options	→ Mark message as read after 5 🖶 sec	
Message Options	Automatic email completion shared address book: None	~
Message Folders Chat Window	Request a read receipt for messages sent	
 Signatures Rules and Filters 	Ask to add new recipient to contact list when sending message	
 Emoticon Themes Vacation Responder 	Compose Message	-
Safe Senders	Rich Text O Normal Text Font: Arial 12 Text Color	
Quick Actions		

13. Added option to enable/disable Change tracking on file attachments on the Contact, Task and Note modules.

🔚 Sar	ve and Close 🔚	Save 🤿 🔏 📌 🗊 🔲 🛛	(h =)	💅 Follow Up					
Linked C	ategories: 💧 🗛	A Service Profile							Quick Sea
General	Home Business	Other Journal Activities Misc. Contact Information	KYC Info	favorite drink A	dress (other))ate
*	Title:	~		File under:	Business	~		^	7
	Name:	Michelle		Middle:			de		5
	Last Name:	Dessler		Nickname:			S.		8
	Display as:	Michelle Dessler	\sim	Service Profile:	AA Profile	\sim			5
	Company:			Review Date:	4-Dec-2015	6			5
	Occupation:			Birthday:	1-Oct-1977	۸			9
		Contact is a Link/Group		Create birth	day event in ca	ilendar	Display		
	E-mail: 💌	michelle@24test.net		Primary	Inactive		Home Information		
	Home E-mail: 🔻	michelle@home24test.ca		Primary	Inactive		Business Information Other Detail		
	Work E-mail: 🔻	michelle@work24test.com		Primary	Inactive		U Other Detail		
		Additional Email							
		1010 7 14		Country Code:					
	Owner:	UVC Test1 V		Mobile Phone: Direct:					
		Private		Direct	Change Phon	e Template	1		
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									Size
							\longrightarrow	~	Track Changes
								~	Auto resize columns to fit width
									Reset Sort Order

- 14. Service profile module now uses subject of profile on recurrence events.
- 15. Added "Days Outstanding" and "Days Overdue" to task module list.

My Tasks 🔻											Quick Search	
Current View	☑ ① Subject	Priority	Due Date 🔺	Task Recipie	% Complete	•	Status	Days Overdue	Days Out	standing		
Active tasks	Click here to create a quick task										Completed Subject	
All tasks	4 Overdue tasks										 Priority 	
Active + On hold	Cuaterly calls	Normal	Mon, Apr 25		0%	1	In Progress	14	14		Start Date	
Next 7 days					<u> </u>			1			Due Date	
Overdue tasks	📂 No repeat	Normal	Tue, Mar 8		0%	No repeat pr.	In Progress	48	48		Categories/	
Completed tasks	Task - for AG-8900 needs to be signed by	Normal	Mon, Feb 1		0%		In Progress	74	74		Linked Con	
Туре	🖀 Task test	Normal	Tue, Jan 12		0%		In Progress	88	88		 Task Recipie 	ents
Short term Long term	💕 Review website	Normal	21-Dec-2015	AlexTest1	0%	1	In Progress	104	129		 Status % Complet 	
Assigned tasks (Owner)	💕 Please call Ron	Normal	6-Nov-2015	AlexTest1	25%	Ĩ	In Progress	135	135		Completed	
Categories/Tags:	💕 Review Jack's TFSA	Normal	4-Nov-2015	AlexTest1	0%	า้	In Progress	137	137		Last Modifi	
All ~	No due date							<u> </u>			Alert	
	V No due date										File Attachr	nents
											Total Work	
											Actual Wor	
Multi-Select										(Days Overd 	
Show Live Tasks for											Days Outsta	inding
🖌 🔯 My Tasks											 Auto resize 	columns to
🖌 🔯 Assigned Tasks											Manual Sor	ting
🖌 🔯 Task Folder 🖌 🔯 Personal Tasks											Add Custor	n Field
Personal Tasks											Remove Cu	
Ontion to "coll:	anse" all or "expand"	' all i	n the	VCard VCard Print	Contacts		Calendar	🔔 Notes 🔮 P		Show My Day		
Option to "colla	apse" all or "expand"	' all i	n the	lnbor	Contacts			•			oices Company	•
	apse" all or "expand"			My Contacts	Contacts T	Tasks	Calendar	🔔 Notes 🔮 P		File Store		
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What's New - UVC Version 8

17. Appointment tag applies background color to cell in calendar.

Options and Preferences	
Seneral	🚵 Calendar Options
Messenger	Active Day
Media	Start time: 07 🗣 : 00 🗣 End time: 20 🗣 : 00 🌩 🗹 Auto-fit active day to window
Contact	Calendar Work Week
Task	Sun 🗹 Mon 🗹 Tue 🕼 Wed 🖓 Thu 🖓 Fri 🗌 Sat
Calendar Options	Options
Calendar List & Defaults Time Zones	Time division: 30 V First week of year: None (Hide Week Numbers) V
Calendar Subscriptions	Week starts on: Sunday V Border type: Single V
Note	Gradient type: Gradient Style 1 v Available time grid style: Both v
🧐 Project	Font size: Small v Search list grid style: None v
No. File Store	
	Span multi day appointments 🗹 Show times in AM/PM format 🗌 Show current time in Day/Week view
	Cell Options
	Minimize overlaying appointments in Day/Week view
	Show owner of appointment in Day/Week view
	Show owner of appointment for All Day events when multiple calendars selected
	Bold font for description
	→ Apply tag color to cell background
	Always show start time in Day/Week view Always show stop time in Day/Week view
	OK Cancel



18. Added export to excel option for journal activities list.

📧 Bill Buchanan - Contact				- 0	×
File Edit Format Attachment To	ols Window Help				
Save and Close 📓 Save	I 😽 🖉 🖬	🕅 👘 👻 🕅 Follow Up			
inked Categories: 📋 📋 Elite Profil	e,Gold Clients				
General Home Business Other	Journal Activities Misc. Contact Info	ormation KYC Info favorite drink Adre	ss (other)		
Journal Activities					
📔 Open 📨 🎢 🚇	📫 🎢 🔍 Quick Search	One-line View Multi-lin	e View Type: All	 View: All 	
Type	Description	Date 🛦	Status	Owner Name	
iype		16-Feb-2017	In Progress	UVC Test1	
🗈 Task	Annual meeting with client Quaterly calls	Sun, May 15	In Progress	UVC Test1	
Appointment/Event Business	Meeting with Bill	Tue, Feb 16 2:00:00 PM	None	UVC Test1	
Email	test3	Mon. Jan 18 12:56:12 PM	None	AlexUVC	
Task	test44	Tue, Jan 5 1:39:33 PM	V Completed	UVC Test1	
Task	test22	Tue, Jan 5 1:39:25 PM	V Completed	UVC Test1	
Task	Service call 2	Tue, Jan 5 1:39:15 PM	V Completed	UVC Test1	
Task	Service call 1	Tue, Jan 5 1:39:09 PM	V Completed	UVC Test1	
🗂 Task	test33	9-Dec-2015	V Completed	UVC Test1	
🗂 Task	Service call - 4 months	4-Nov-2015 3:58:50 PM	V Completed	UVC Test1	
🗭 Email	Welcome!		None	UVC Test1	
		Open			
		Export to Excel (csv)			
		Refresh			
		New Task for Contact			
		New Appointment for Contact			
		New Note for Contact			

- 19. Message Folders now apply color applied by owner for shared mailbox folders.
- 20. Improved speed when selecting an e-mail message with multiple attachments.
- 21. Major performance improvement on the Journal Activities tabs, especially when there is access to multiple large shared mailboxes.

22. Option to automatically approve file transfers in chat.

General	🗇 Chat Window		
Messenger Public Profile Privacy Account Setup Message Options Message Folders Account Setup Account Account Setup Account Account Setup Account	Handle Text Font: Dialog 14 Text Color Background Color Chat Text Font: Dialog 14 Text Color Background Color Preview		
Signatures Rules and Filters Emoticon Themes Vacation Responder Safe Senders	11:18 UVCTest1: Test Message		
Quick Actions	Other Chat Options		
Contact	Show timestamp Show emoticons		
🌱 Task	Scale emoticon to text size Override font size from other contacts		
🖄 Calendar	⊡ Enable automatic spell check ⊡ Enable tabbed chat windows Merge message lines when possible		
Project	Play sound on new messages even when window is in focus		
File Store	File Transfer Put files you receive from your Contacts in this folder: C:\UerrVohnAppData\Roaming\UVC\ Select Directory Automatically approve file transfers		

- 23. Improved custom fields/forms functionality:
 - a. Custom forms can now be designed through the User Management application.

General Sharing Permissions Templates General Permissions Templates	Module Type: Address Boo	k Module 🗸		
User Groups Categories/Tags	Description	Module Type	Workgroup	New Custom Form
Custom Fields Contact Automation				Delete Edit
Ticketing				ean 🕹

- b. Create Custom Fields/Forms that apply to the whole company or to specific workgroups. This is in addition to the existing functionality of creating custom forms for shared contacts, tasks, notes and appointments.
- c. Ability to specify custom form fields to be added on main tab of the General contact detail screen or as separate tabs.



d. Added new title header custom field type.

A		Misc. Contact Information
Seneral	Custom Fields	
Messenger	Name Field ID Add to Main Panel	New Tab Language:
Contact Contact Options Custom Fields Contact Sharing	New Custom Field X Description: Spousal Information	Veen rinu Does not want to receive emails Delete SiN: Edit SiN: Preview Number of dependants
Task	Field Width:	Image: constraint of the state of
Note	Layout Field in Next Column	Dependant #1 Name: Dependant #2 Name: Dependant #2 DOB: Dependant #2 DOB:
퉳 File Store	Uo not include nela on printouis	Dependant #4 Name: Dependant #5 Name:
	Field ID 72514-37 OK Cancel	Dependant #4 DOB: Bependant #5 DOB: Dependant #5 Dependant #5 DoB: Dependant #5 DOB: Dependant #5 DOB: Dependant #5 DOB:
	Spousal SIN 72914-21 Spousal Occupation 72914-19 Spousal Email Address 72914-28 Spousal Address 72914-22	Spousal First Name: Spousal Last Name: Spousal Lost Name: Spousal DOB:
		OK Cancel Spousal SIN:

e. Create multiple templates that can be grouped and applied to workgroups.

General	🔌 Custom Fields			
 Sharing Permissions Templates General Permissions Templates User Groups 	Module Type: Address Boo	ok Module $ \sim $	Ļ	
Categories/Tags	Description	Module Type	Workgroup	New Custom Form
Contact Automation				Delete
Ticketing				÷
Invoicing				Francisco -

24. Option to add a URL to image.

🥩 My new signature with banner - Message					
File Edit Format Attachment Tools Window Help					
🗇 Send 🔚 Save as Draft 🐗 🛷 🧊 📋 🕅 💱	🕶 🍄 🆿 🕶 🊧 👻 🤾 Contacts				
To:					
Show Cc and Bcc					
Subject: My new signature with banner					
Attachments: UVCbanner.jpg (19KB) Arial V 10 V 😵 B I U	■■ Ξ Ξ Ξ				
Universal Village Software	Toll Free: 1(877)385-3660 35 Antares Drive, Suite 200 Ottawa, ON, K2E 8B1				
	Hyperlink				

My name				
Name of Company				
Email address				
Phone Number				
Fax Number				
Address of Company				

- 25. Removed blue border from images that are linked with URL's.
- 26. Added Appointment Status to Detail Printout as well as to invitation message.

Meeting with Jane Doe - Appointmen File Edit Format Attachment Tools W			_		\times	ursday ay 2016
🔚 Save and Close 🔚 Save 🐳	🔏 😽 😥 🗋 🕅 🐟 🕶 🕅 👻 🥀 Contacts					
Priority: High						1
General Details 🔩 Alert 📿 Repeat	Attendees Available Time Calendar Fields Test					
Description: Meeting with Jane Doe	L	Location:				
Start Time: 24-May-2016 @ Stop Time: 24-May-2016 @				Show Tir	nezone	E
Calendar: Alex Blanchet V	dar v	Status:	Confirmed	I	~	
18thCentury v 8						
Jane wants to inquire about opening a	new RRSP with us.				^	-
A UVC Print Preview				-		×
Prev Page 🔰 N	ext Page Close			131%		
Description: Status: Owner: Start Date: Time Zone: Priority: Type: Created By: Notes:	/ith Jane Doe Meeting with Jane Doe Confirmed Alex Blanchet Tuesday, May 24, 2016 3:30:00 PM T (May May 24, 2016 3:30:00 PM (GMT 200) Eastein Time (US & Canada) High Business Alex Blanchet					^

27. Added the functionality to create mail merge template forms within UVC. Simply create your desired mail merge template with the available 31 fields and save it.



When a message is tailored to the reader, it has more resonance because it means something. The option to send the template message by e-mail (single or bulk) or to print it is available. Change the font and add some color if you wish.

🔿 Mail Merge	×	
This wizard allows you to export data for mail	merge or other purposes.	
Mail Merge Type	application	
Select clients to export O Apply active search litter	🥩 Birthday template - Inbox - Message	
	🥪 Reply 🧐 Reply All 😏 Forward 🧠 🔏 🔧 🔻 🕅	▼ M ▼ Contacts 🤍 Find
	Birthday template	
	From: To:	
	Linked Contacts:	
	Hi <i>John Doe</i> ,	
	Congratulations! All of us at Universal Village wish you a ve We send you our sincerest wishes.	ery happy birthday on this 28th of October and another year filled with success.
	The Universal Village Team.	

Defect Corrections

- 1. Marking a note private from journal activities makes it only visible to you unless you have given Private access to user(s) in note shares.
- 2. Fixed issue where default font gets overridden when replying to some emails.
- 3. Plain text emails are not applying zooming in email message on high dpi screens.
- 4. In some cases, users can't modify contact notes even though they should have access.
- 5. Improved performance on shared email boxes.
- 6. Can't send Read receipts on shared mailboxes.
- 7. Task recipient can modify all fields for service profile task instead of just Status and notes.
- 8. Remove alert on task once task is completed.
- 9. Automatically save email in draft when shutting down computer.
- 10. Resolve issue with tasks created from email won't save due to attachment.
- 11. If task notes are plain when adding quick note, it removes the carriage return from all the notes.
- 12. Fixed Next action and notes are reversed in Ticket tab.

×

Add

Close