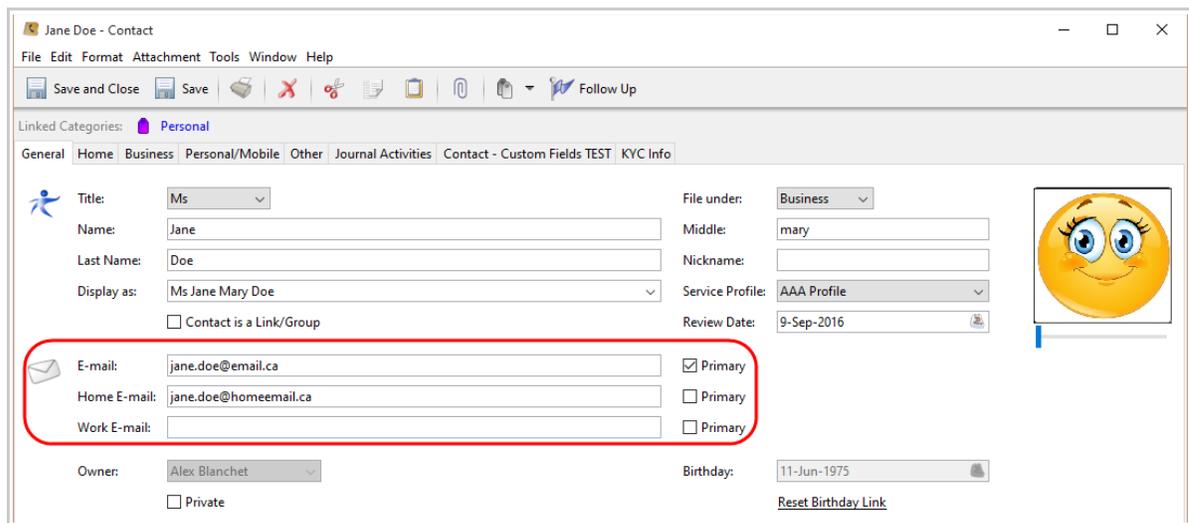


How to Link and E-mail to a Contact

The current UVC logic for e-mails to appear under the **Journal Activity** is based on the client's e-mail address that is entered under the client's **Contact** details. 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 their e-mails **will always** be "linked" to that contact.

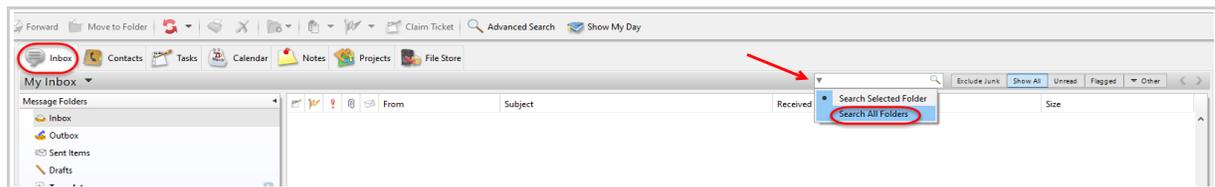
But there are cases where a contact will have a new e-mail address and their current e-mail address will need to be updated on either the E-mail or Home E-Mail or even the Work e-mail address field. If that is the case once the e-mail is removed and replaced for a new one all e-mails appearing under the **Journal Activity** will no longer display. **They will not be deleted** from UVC they simply will no longer show under Journal Activity.



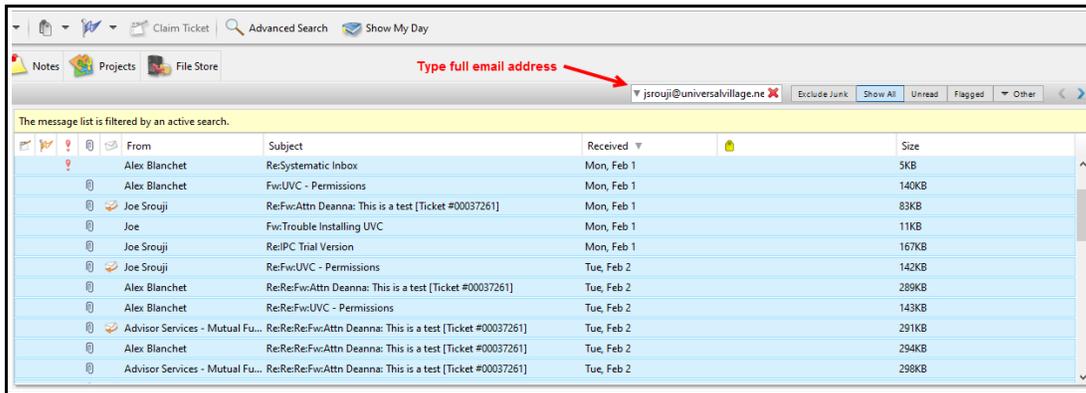
To avoid this problem your **first option** is add the "new" e-mail address under any of the three fields mentioned above. Keeping the "old" e-mail address and adding the "new" e-mail address in one of the blank e-mail address fields will keep all e-mails linked to the contact intact and available to view under **Journal Activities**.

But if all e-mail fields are taken with an active e-mail or you simply no longer want to keep the older e-mail address in your records your **second option** is to link all previous e-mails (linked to the old e-mail address) to the contact. Below we will explain how to find all e-mails linked to the e-mail address that needs to be updated and/or deleted and then link those e-mails to the contact.

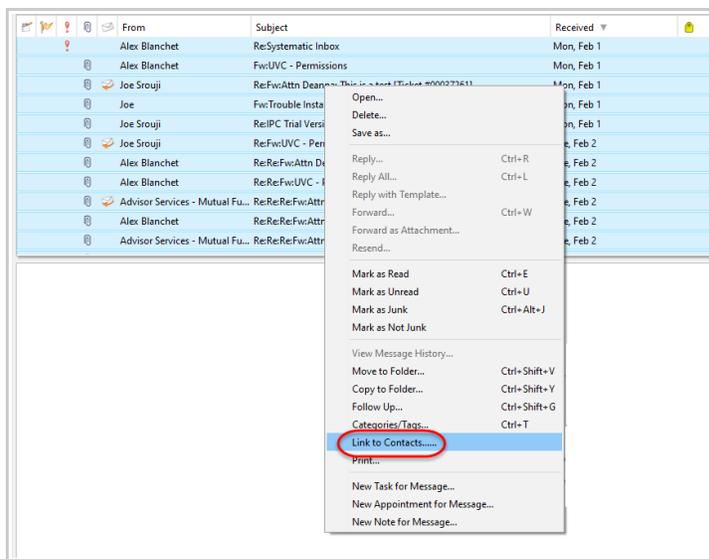
1. Access your **Inbox Module**.
2. Click on the down arrow to display the drop-down menu. Select the option **Search All Folders**. This option will search all folders. You have the ability to search one single folder if you wish. Just remember to select the folder of your choice and select the option **Search Selected Folder**.



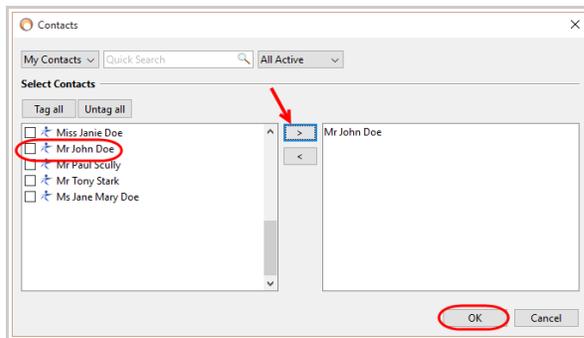
- In the **search window** type the e-mail address (that needs to be updated/deleted) exactly how it shows up under the Contact Detail information window of the client.
Press the **Enter** key.
All e-mails linked to that e-mail address will be displayed. Those are all the e-mails from **All Folders** (option selected in Step#2).
Press the **CTRL + A** key on your keyboard to select all e-mails.



- Right click on any e-mail. On this pop up menu select the option **Link to Contacts ...**



- A contacts pop up window will open up.
You will be able to select the contact where these e-mails should be “linked” too.
Once you have selected the contact click on the **-> right arrow** to add them to the right side of the list.
Click **OK** to save your changes.



- Once that is done all e-mails you have selected in step#3 will now be linked directly to that contact rather than it's e-mail address.

Now you can go under that contact and edit the old e-mail address and updated it with the new e-mail address. Save your changes.