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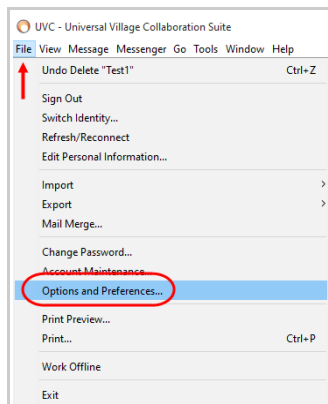
Click on **Calendar** and then **Time Zones**.
On the right side of the screen you will be able to choose your **Default Time Zone** from the available drop down menu. Once you have made your selection click on the **OK** button to save your choice. Any future tasks and appointments you will create in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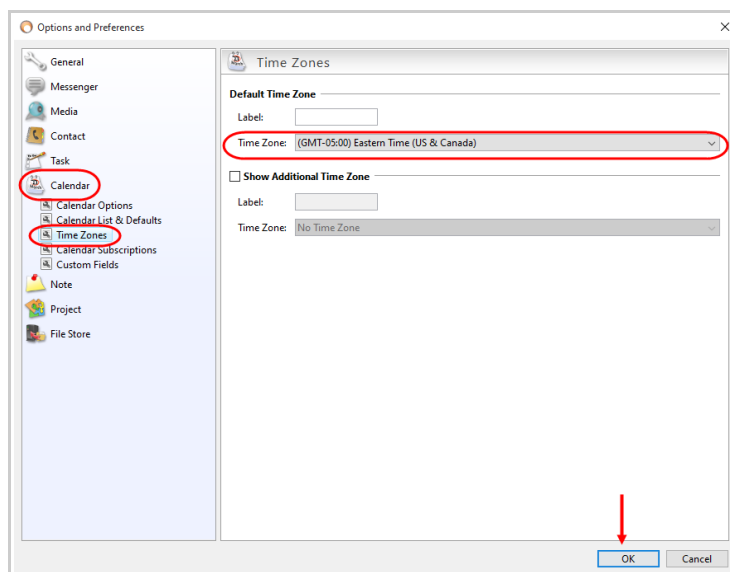
II. **Share an email folder**

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**.

Please take note 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.
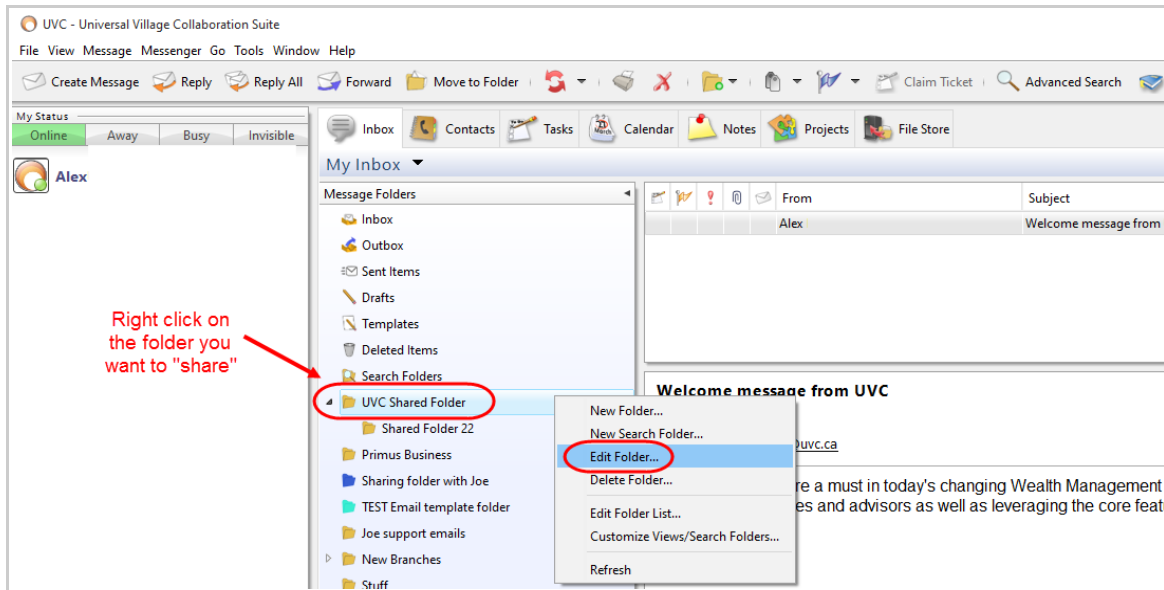
(2) Your second step is to make sure to check the option **Enable Sharing** and then click on the **Add User(s)** button.
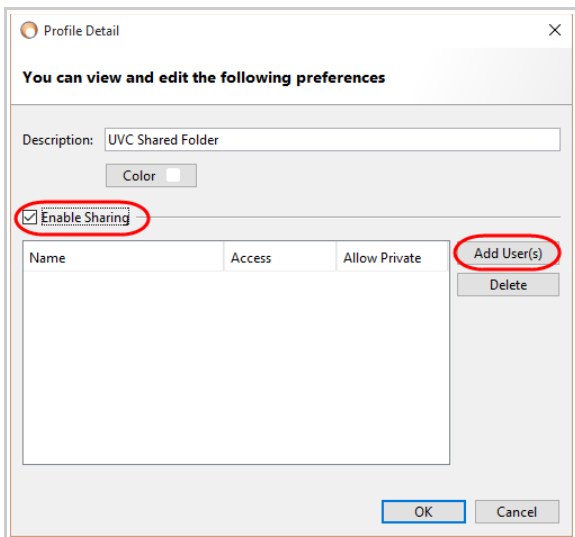
(3) Your third step is to add a **check mark** next to the user that you want to share the email folder with and then select the **Access Level**.

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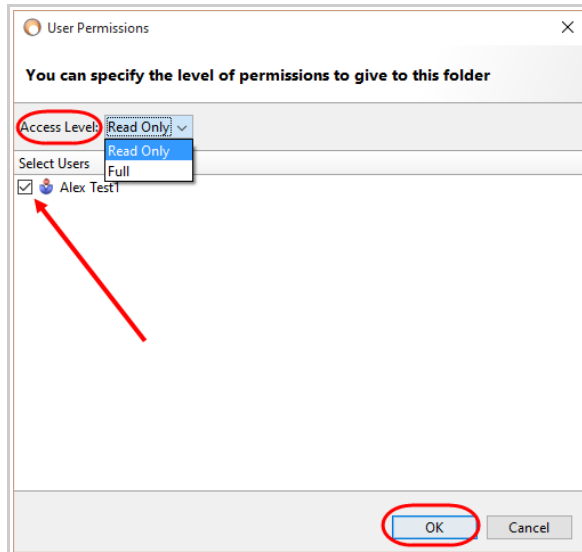
(4) As seen below in this scenario I will be sharing the **UVC Shared Folder** with *AlexTest1*.
   Your fourth and final step is to click the **OK** button to confirm and save your changes.
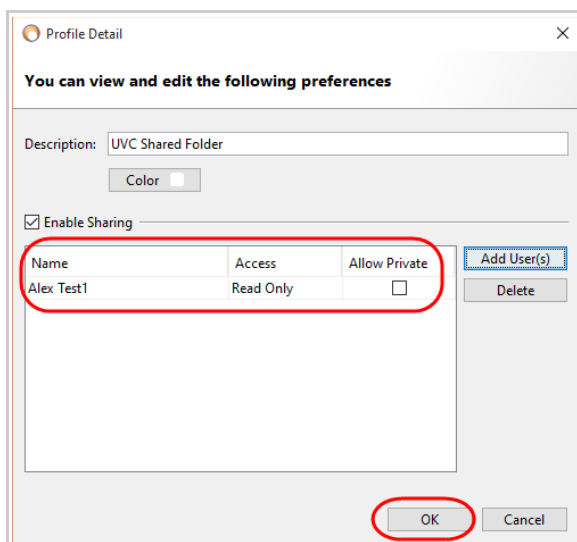

When *AlexTest1* logs in to UVC he will be able to see two different email **Inbox**. They will be accessible using the drop-down menu. One will be his own inbox (My Inbox) and the other is the one shared with *Alex*.
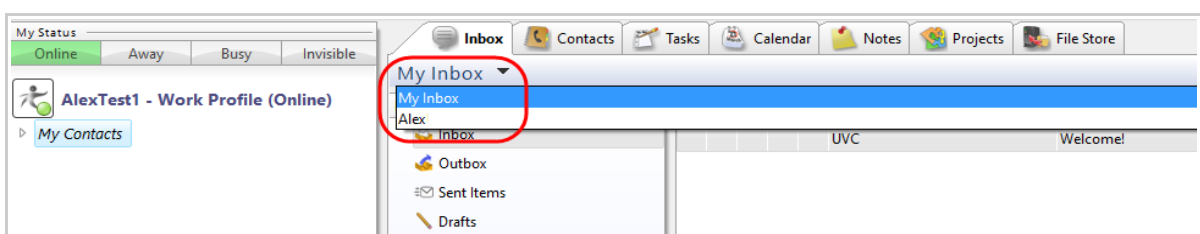
When *AlexTest1* selects the *Alex* inbox he will see the UVC shared Folder emails.
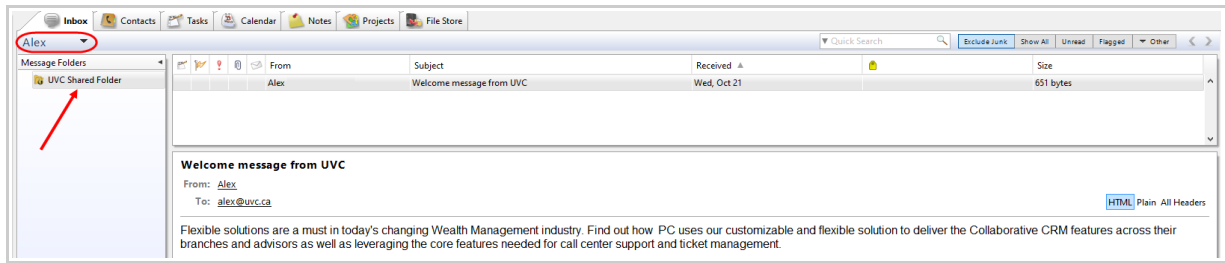
As I explained above, under the **UVC Shared Folder** there's a sub folder entitled **Shared Folder 22**. If you also want a new or existing contact to have access to a sub folder then these **4 steps** will need to be repeated again for that sub folder. Once you do, the user will be able to see the folder and any emails within that sub folder.
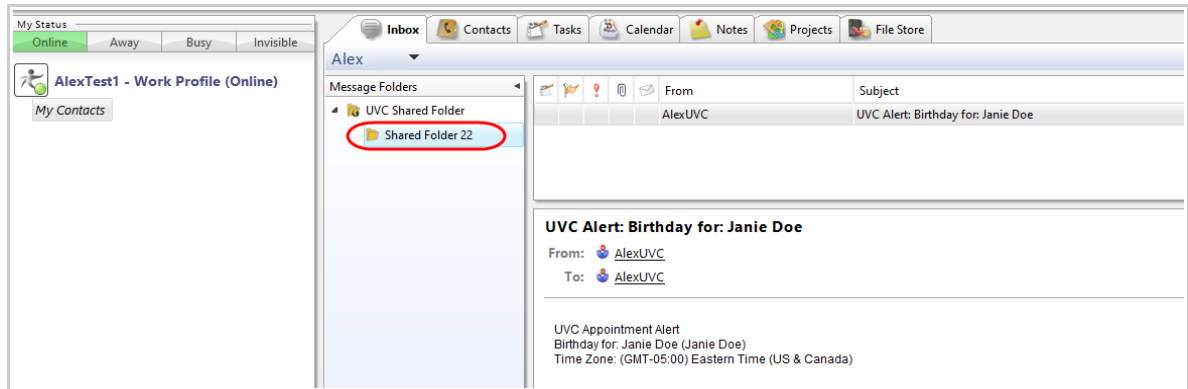

III. Share a calendar

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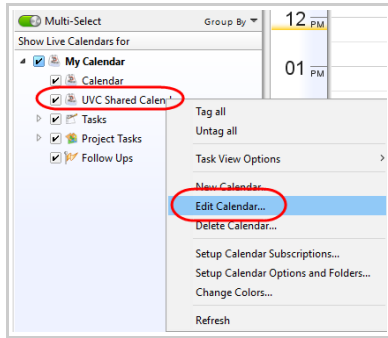
The calendar sharing procedure needs to be configured under the **Calendar** view.

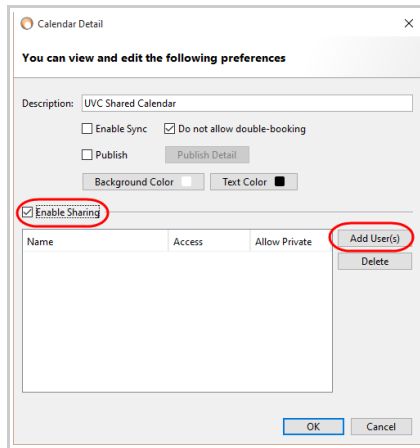In this example we will be sharing the **UVC Shared Calendar** with AlexTest1.
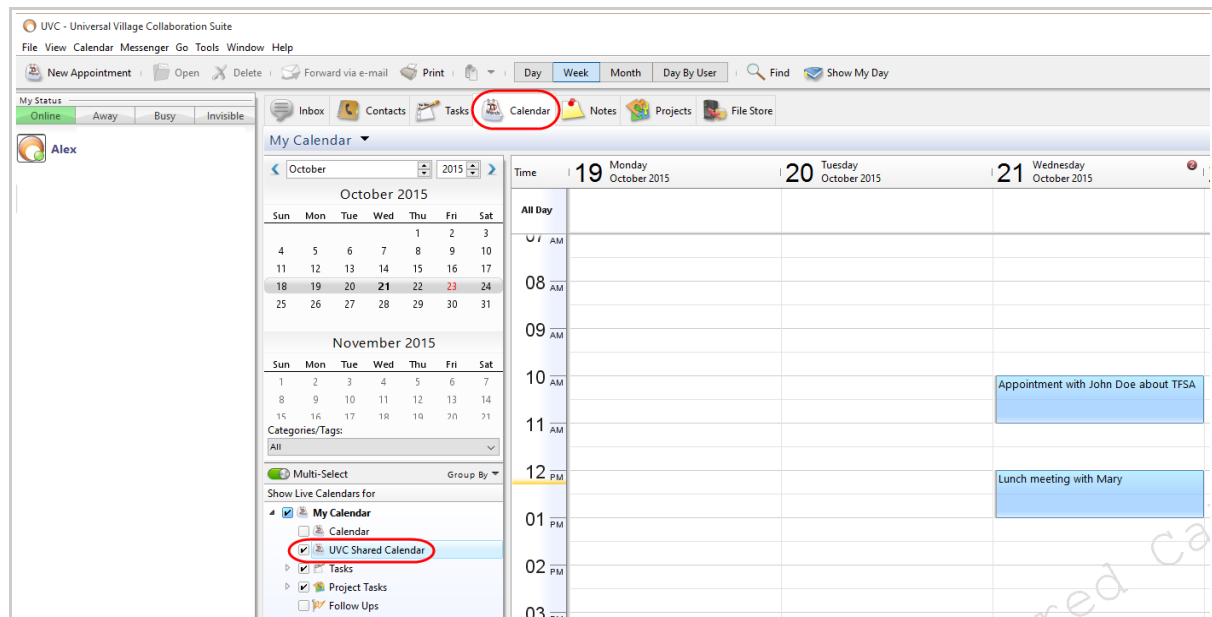
There are **four steps** to follow to share your calendar with a contact from your list.

(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.

(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.
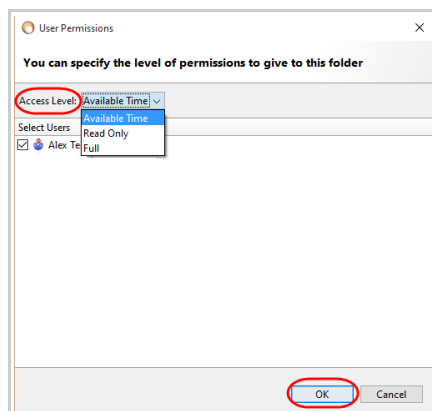
(4) As seen below in this scenario I will be sharing the **UVC Shared Calendar** with *AlexTest1*. Your fourth and final step is to click the **OK** button to confirm and save your changes.
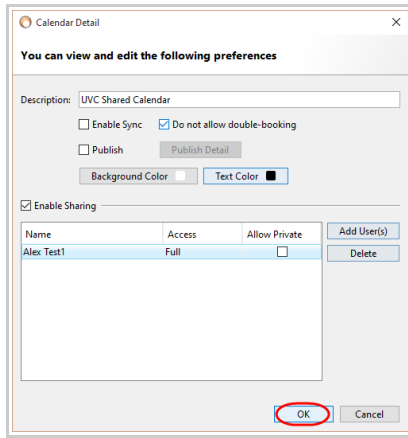
When *AlexTest1* views their calendar they will also be able to see the *Alex* calendar once it's selected.
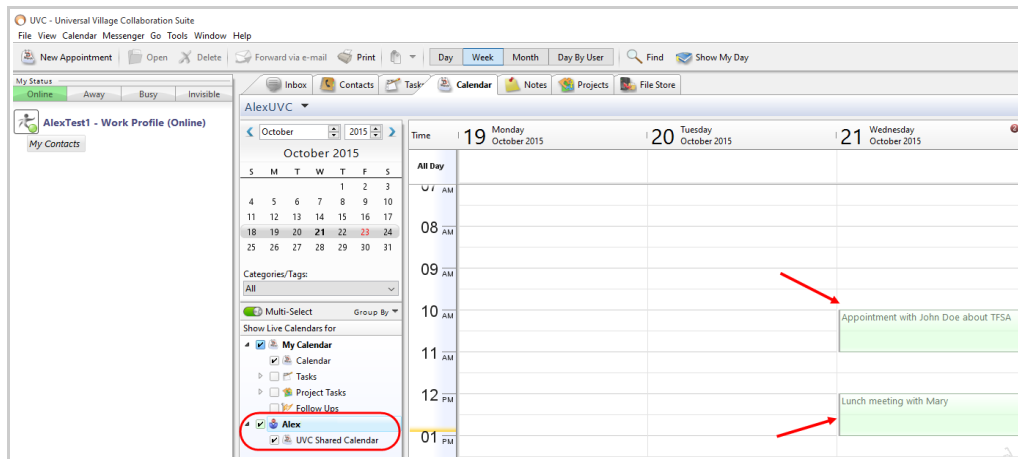

IV. **Share your contact list**

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.
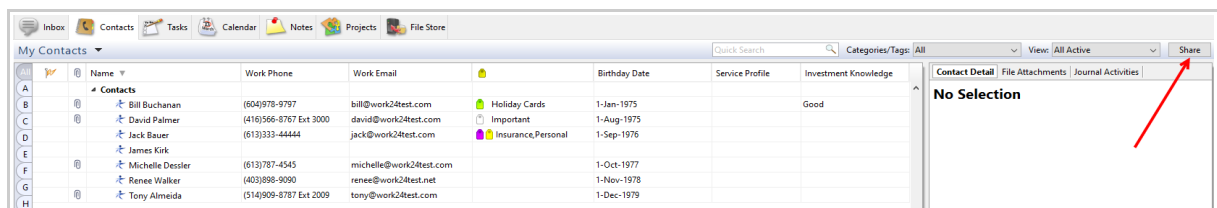
**(2)** Click on the **Add User(s)** button to add the user of your choice.
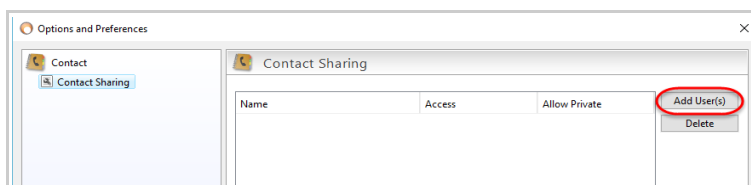
(3) Select the user by clicking the box next to their name. In this case I will select *IPC_testuser*.
Then select an **Access Level**. We recommend FULL access.
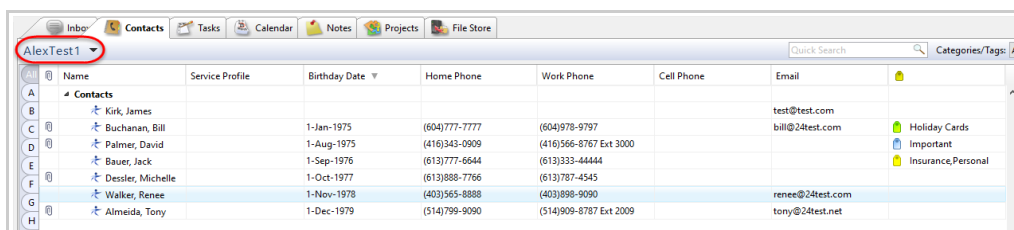Click the **OK** button to save your changes.
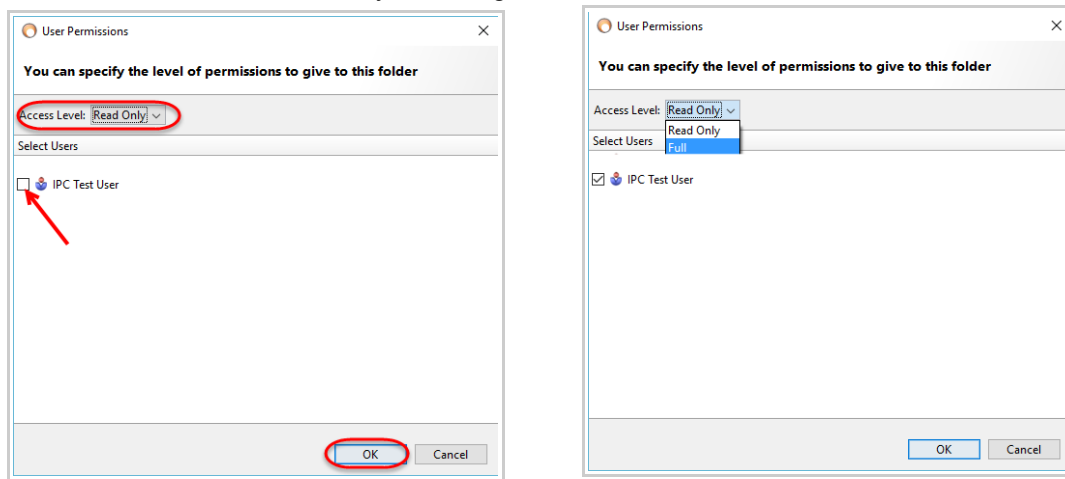
(4) Review your configuration and click on the **OK** button again to confirm.
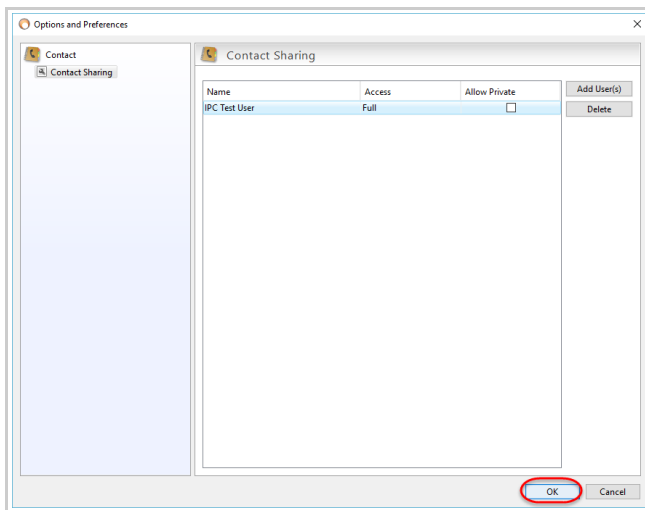
(5) The user that you are now sharing your contact list with will now have access to your contacts by clicking on the drop down menu next to My Contacts.
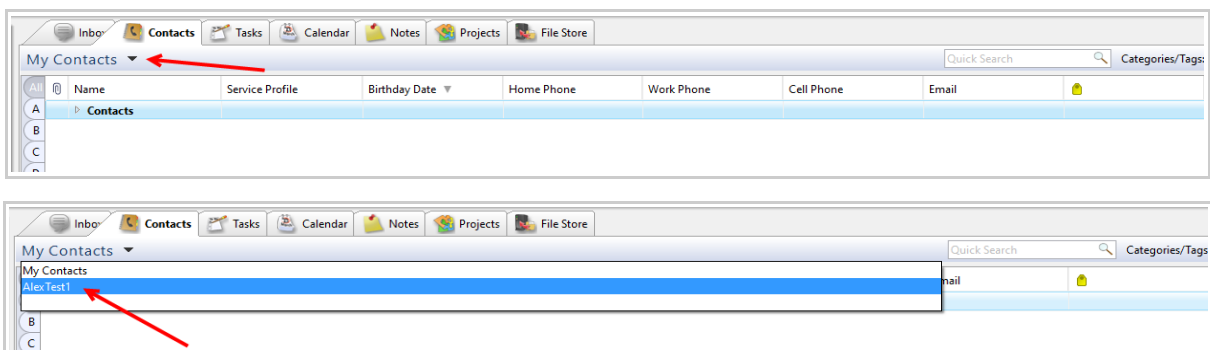
(6) Once they select this contact list they will see all its contacts.

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.
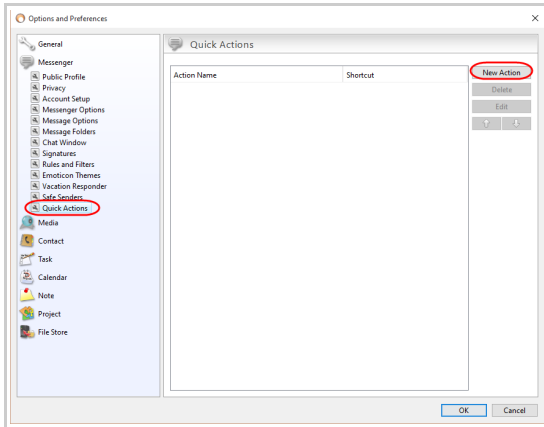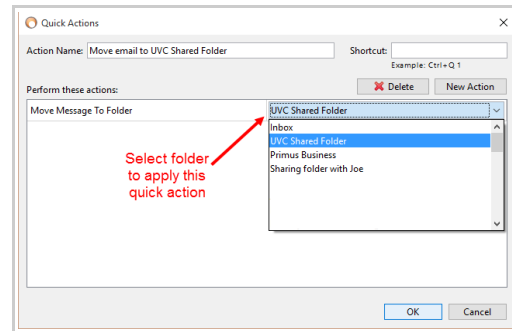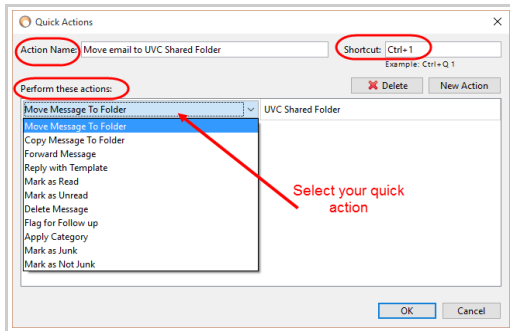

You will be brought up to a screen where you will need to enter an **Action Name**.
You can even add a **Shortcut** (not mandatory) for your quick action.
You can select any of the available actions from the drop down menu under **Perform these actions**.
On the right side you will need to select the folder for which this quick action will be applied.
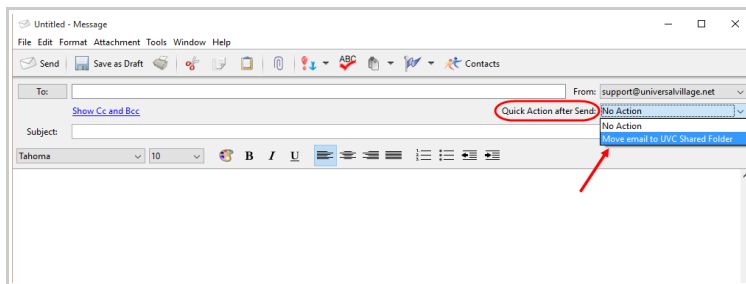

You can add as many actions as you want to a single **Quick Action**.
Simply click on the **New Action** button to add a new action to your **Quick Action**.
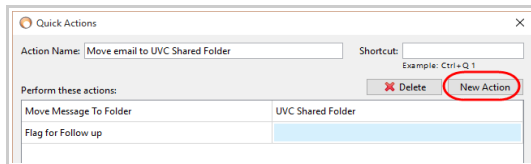

Click on the **OK** button to save your **Quick Action**.
When you create an e-mail and select a **Quick Action after Send** it will be applied automatically.

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.
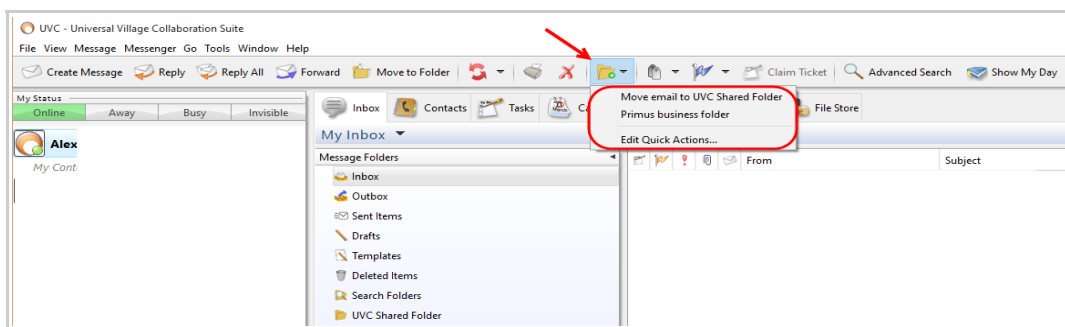
VI. **How to use the custom fields**

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.
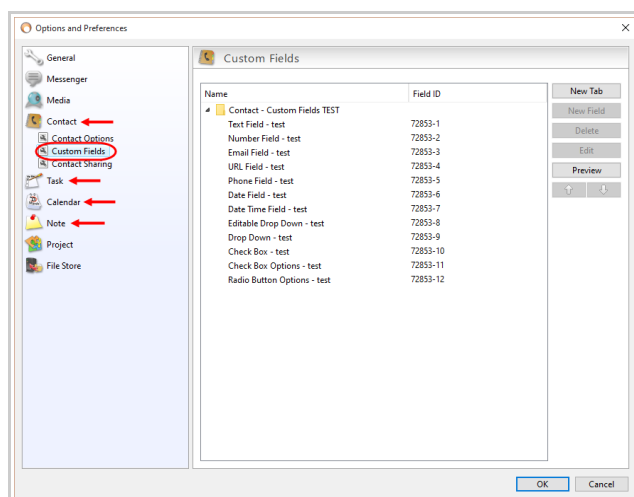

The most common and useful place to add custom fields would be under the Contacts view. But as mentioned above you can also create these custom fields under the Task, Calendar, Note or Project view. Below we will explain how to create some custom fields under Contacts.

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**.
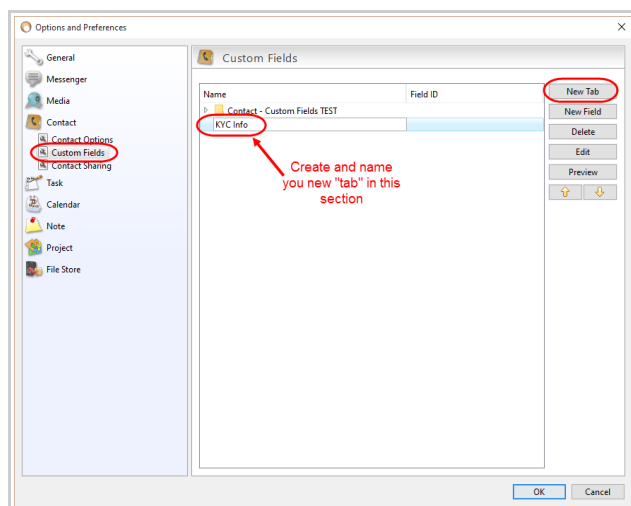
Once you have created your new tab you are ready to add a **New Field** within the highlighted tab.
Make sure that you have selected your new tab and then click on the **New Field** button.
You will see the **New Custom Field** window pop-up.
This is the window which will allow you to create endless possibilities of custom fields to your new or existing tab.
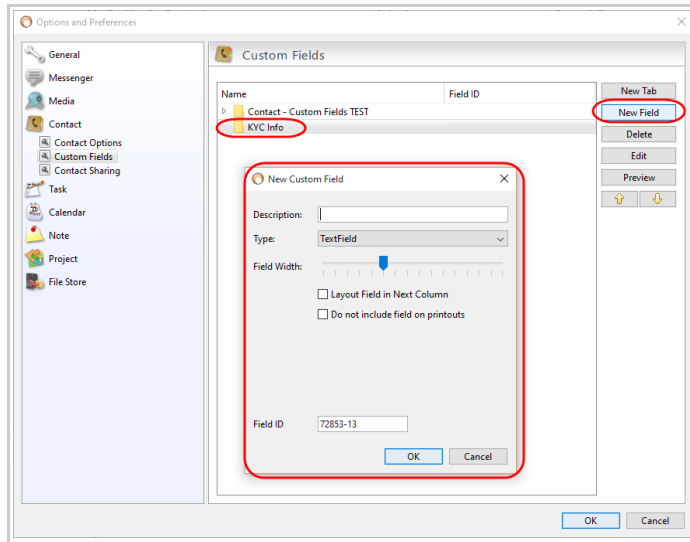
First you will need to enter the **Description** of your new field and the **Type**.
The **Type** drop down menu will let you choose between all sorts of input methods for your new field.
Click on the **OK** button to save your new field.
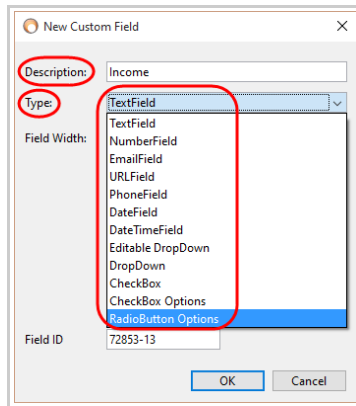
In my example I will create Income, Net Worth, Investment Knowledge, Investment Experience and Investment Objective fields.

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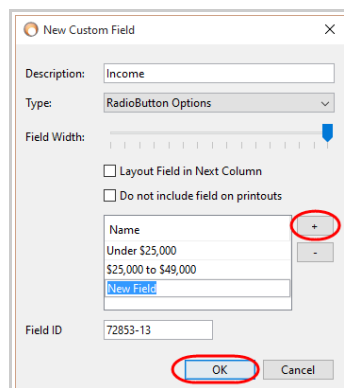
You can also align your fields the way you want.
If you want you can click on the **Layout Field in the Next Column** to move the field to the right.
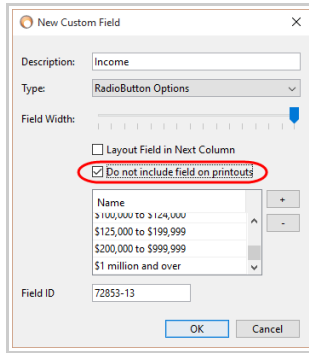

You can also move the fields **Up** or **Down** to change the visual layout on the fields that will appear under the tab. In this scenario I will be moving the Investment Knowledge below Net Worth – Liquid Assets and make sure that it has the **Layout Field in the Next Column** checked so that it appears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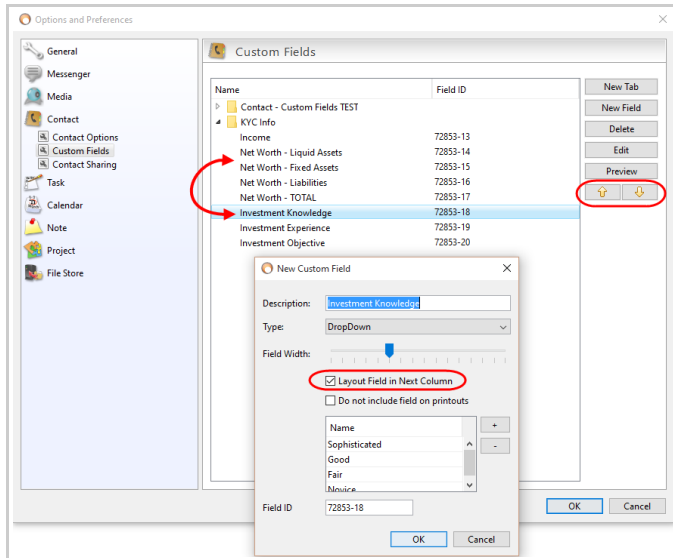
Click on the **OK** button to save your changes.

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.
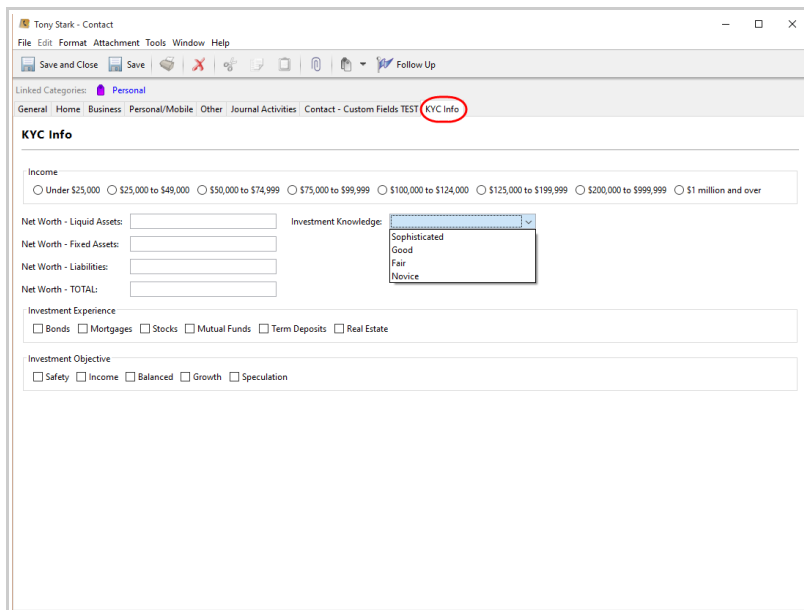
VII. **Creating tasks**

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.
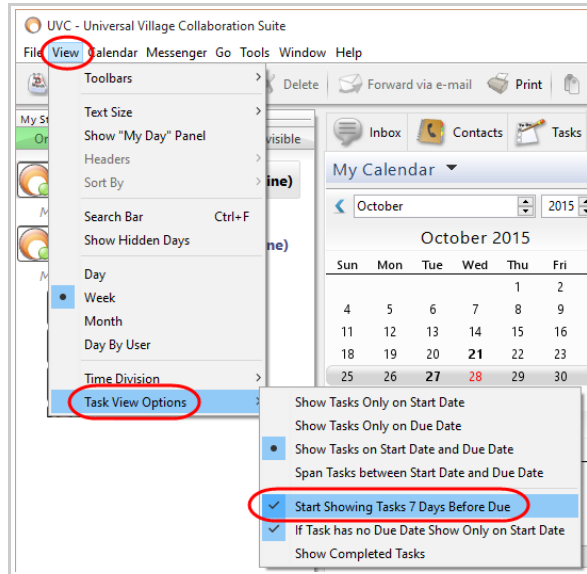

Another best practice is the assignment of tasks to other users. This is particularity useful when you want another user to take ownership of a task you created.
You can assign a task to a user within your team from either the **Contact Module** or the **Task Module** screen. The preferred method is 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**.
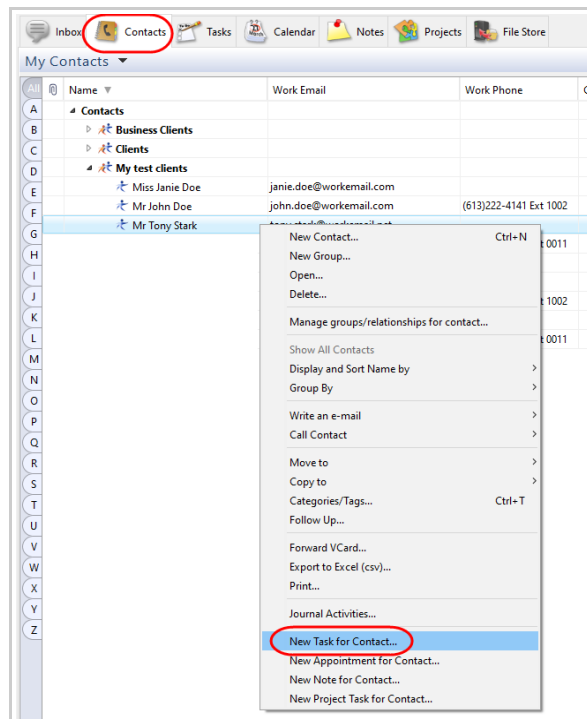
Automatically you will see that this new **Task** will be "linked" to the client you selected.
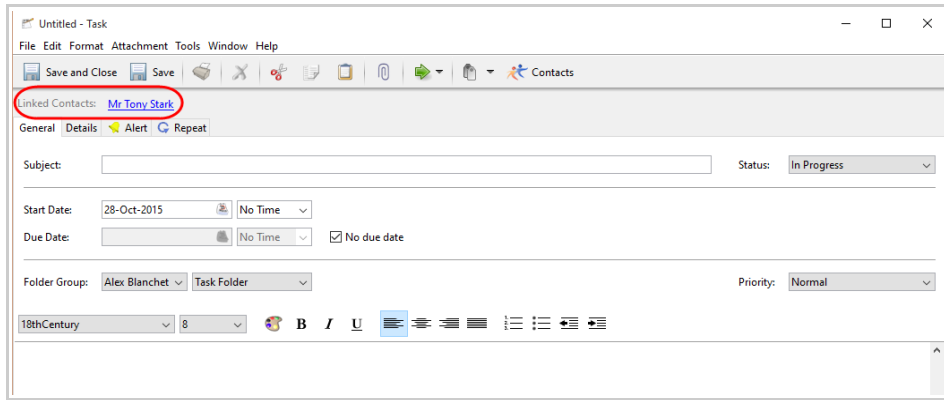
If you would rather create tasks under the **Tasks** screen just remember to "link" it to the client.
Click on the **Contacts** button located on the top and select the contact which it should be linked to.
Use the arrow to link the selected contact.
Click the **OK** to save.
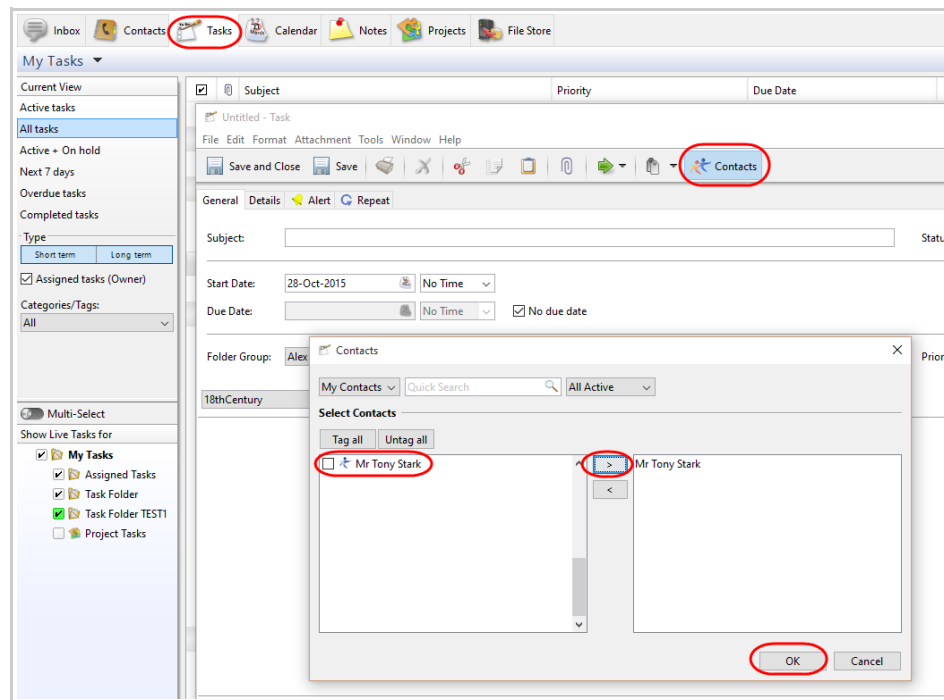
This "link" is important so that it can be historically kept under the contact's **Journal Activities** information tab.
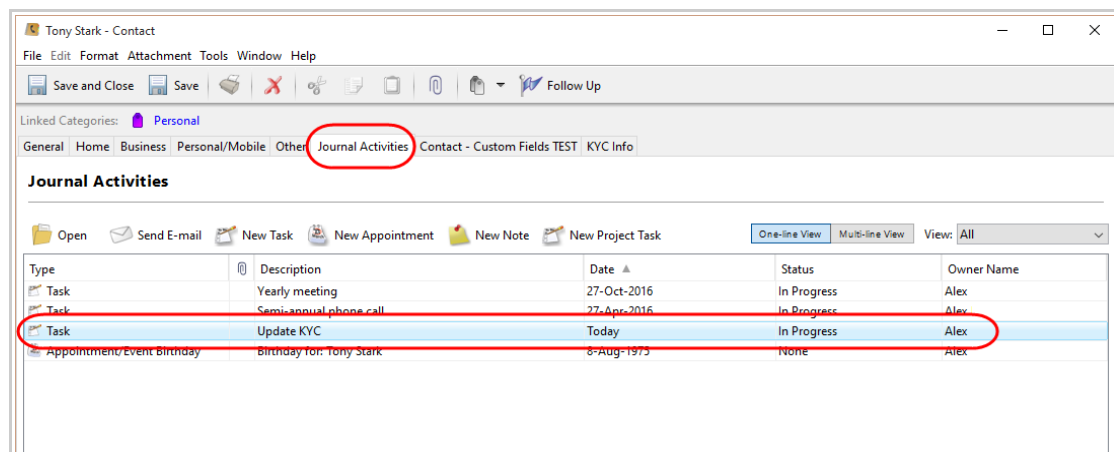
To assign your task to a user on your team click on the **Details** tab within the task window.
Select the user from the **Assign Task To The Following Users** section.

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.
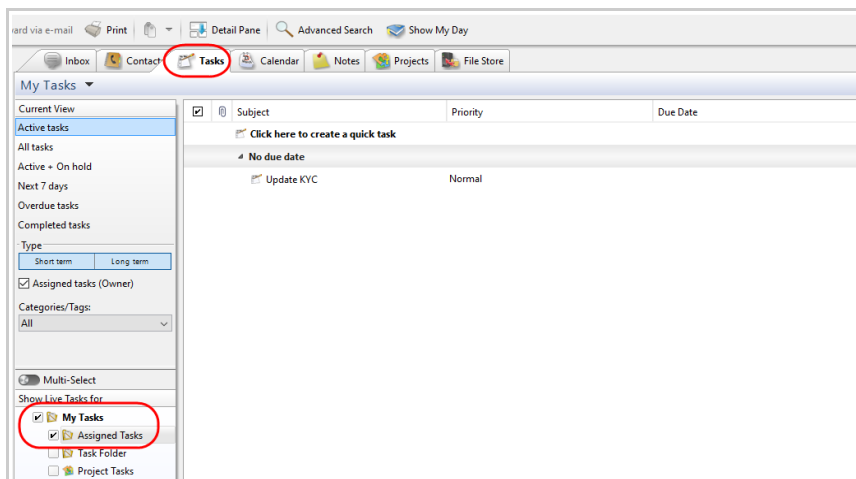If this specific option is not checked the assigned user will only be able to change the status and add notes to the task.
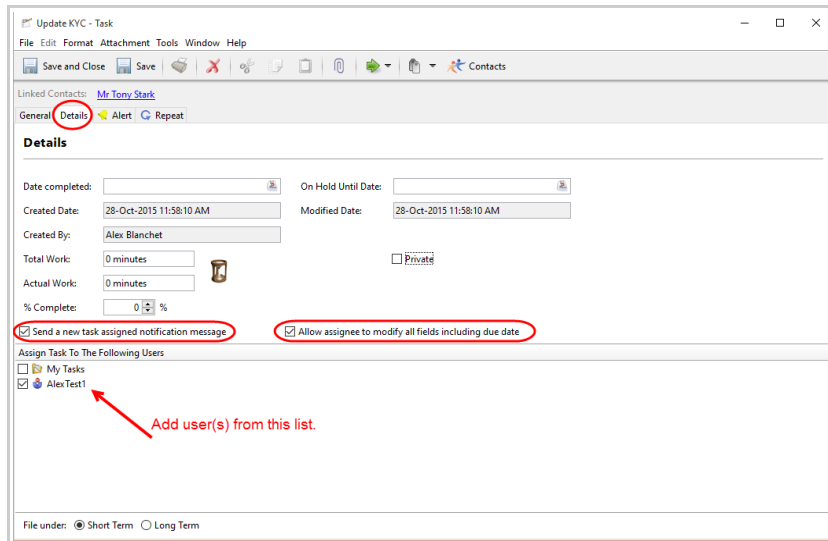
Once the assigned UVC user receives the e-mail notification message they have the ability to **Open** the task.
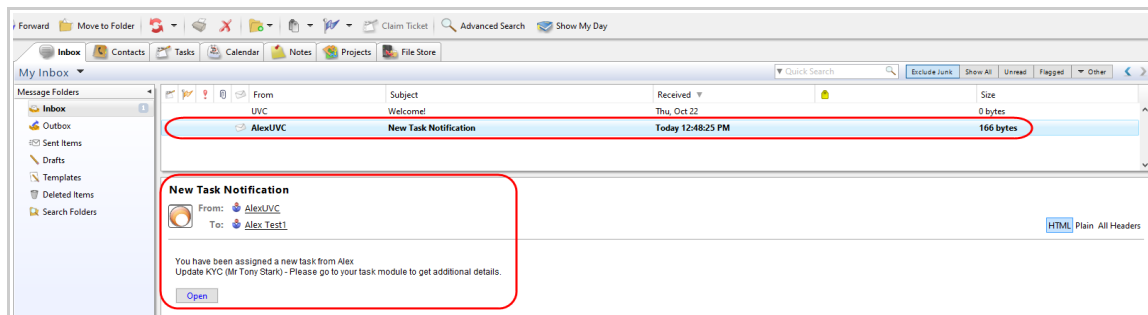

The owner of the task will be able to view their assigned task in their own **Task** view tab under the **Assigned Tasks** folder.

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.
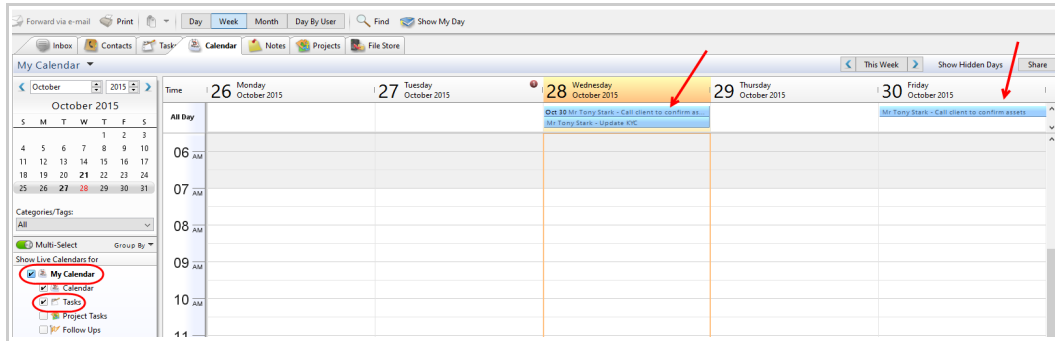
But these task view default options can be configurable under **View** and **Task View Options**.
It's a matter of preference and what best works for you.
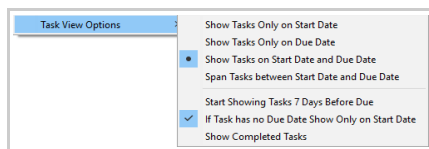
Take note that once you have assigned a task to another user if you want to make changes to that task make sure to search and edit the task under your own **Task Folder** and have the **Assigned Task (owner)** option selected. If you do not select this option any assigned task will not show up on your **Task Folder**.
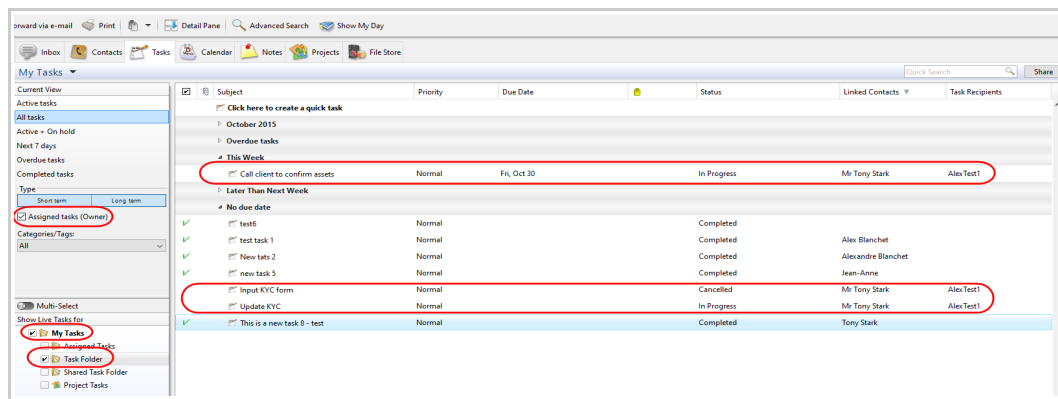
We recommend that you also add the header **Task Recipients** to the Task view (as seen below) so that it's easier for you to know who the assigned user is for each task.
Simply right click on an existing header to see the sub-menu and select the option **Task Recipients**.