

What's New – UVC Version 8.1

Enhancements version 8.1

1. Changed Note Module search to allow for searching notes created in the Contact Module.

🔿 UVC - Ur	niversal Village Collaboration Suite								
File View N	lote Messenger Go Tools Windov	v Help							
🕍 New Ne	ote 🍃 Open 🔏 Delete 🗧	🏈 Forward via e-ma	il 🐳 Print 👔	👻 🔍 Find 💈	🍼 Show My Day				
• _ 6	Inbox 🦉 Contacts 🞢 Task	cs 🖄 Calenda	💧 Notes	Analytics Dashboard	🔮 Projects 🛛 🛃 F	File St	ore		
My No	otes 🔻								
Text		ج Fir	nd						
Туре:	Contact Global Note Contact To 26-0.	✓							
1 Desc	cription 🔻	Linked Contacts	Note Type	Note Date	Status		* 🖓 🕻	Arial	~
🔺 C	lick here to create a quick note					^			_
👗 a	nnual meeting 4th october 2014	meeting 4th october 2014 Renee Wed, Oct 12		Wed, Oct 12	On Hold			r: needs to sign TFSA 1: 12-Oct-2016 2:32:37 PM	
👗 a	nnual meeting Setp 1st 2016	Renee		Wed, Oct 12	Cancelled		Last Modifie	1: 26-Oct-2016 10:06:26 AM	
👗 a	nnula meeting notes	Janie Doe	phone call	Wed, Oct 12	Completed				
📥 n	eeds to sign TFSA	Renee		Wed, Oct 12	Completed				
📥 P	Please call	Michelle Dessler		Fri, Jun 10	Completed				

2. The Cc and Bcc option changed to automatically show if the last time the Show Cc and Bcc option was selected.

🥩 Untitled - Message	-	×
File Edit Format Attachment Tools Window Help		
📨 Send 🛛 🔚 Save as Draft 🐗 🔗 🗊 🔲 🕅 🕴 💱 🔻 🍄 🕅 👻 🊧 Contacts		
То:		
Hide Cc and Bcc Quick Action after Send: No Ac	tion	\sim
Cc		
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3. Added the ability to search all folders on shared mailboxes instead of just your own.

🔿 UVC - Universal Village Collaboration Suite					- C	x c
File View Message Messenger Go Tools W	Vindow Help					
🗇 Create Message 🛛 Reply 🌍 Reply	y All 🖙 Forward 👚 Move to Folder 💈 👻	🐳 🔏 🃷 = 🛍 = 🊧 = 🔍 Advar	nced Search 🛛 💓 Show My Day			
🕨 🧊 Inbox 🦉 Contacts 🖉 Ta	asks 🛛 🛎 Calendar i 🍐 Notes 🛛 😴 Analytics Dashl	board 🔹 Projects 🔤 File Store				
My Inbox 🔻			Q.~	Exclude Junk Show A	All Unread Flagged 🔻 Other	$\langle \rangle$
Message Folders	◄ ₩ ? 10 S From	Subject Received	Size Search Selected Folder	ent ≜	•	
🛶 Inbox	^		Search All Folders			
💪 Outbox			Search All Fields			
i⊠ Sent Items			Search From/To Only			
▶ Drafts						
📉 Templates						
Deleted Items						

4. Added ability to filter by Primary e-mail only in Recipient window and to show which emails are primary, work and home in the list.

🥬 Untitled - Message	
<u>File Edit Format Attachment Tools Window</u>	Help
🗇 Send Save as Draft 🗳 😽	🚽 📋 🛛 🂱 🖛 🍄 🅅 👻 🊧 🗸 Contacts
Show Cc and Bcc	
Subject:	
Arial v 12 v	My Contacts V Q. Quick Search All Active V Primary e-mail only
Arial v 12 v	Tag all Untag all Categories/Tags: All 🗸
	Select users to send message to
	🗌 🛧 Jane Doe <jane.doe@email.primary.ca> (Primary)</jane.doe@email.primary.ca>
	□ Tanie Doe < janie.doe@email.primary.com> (Primary)

Chiller Mar

- 5. Fixed performance issue when selecting a message. In rare cases it can take over 5 seconds due to an optimization issue when retrieving thread history.
- 6. The Project icon in Journal Activities was updated to a new Project Task icon instead of using the same as a new Task icon.
- 7. Optimization of 10% to 15% in speed when opening shared folders.
- 8. Add ability to search for All fields or Search From/To Only in search drop down of the Inbox Module.

🔿 UVC - Universal Village Collaboration Suite								- 0
File View Message Messenger Go Tools Window H	Help							
🗇 Create Message 🦃 Reply 😜 Reply All 😒	🏽 Forward 👘 Move to Folder 🛛 💁 🚽	X 🔤 - 🕅 - 🕅	- 🔍 Advanced Search 🗧	n Show My	/ Day			
Inbox Contacts Tasks (#	🖄 Calendar 🛛 🎒 Notes 🛛 💎 Analytics Dashboard	🔮 Projects 🛛 💺 File Store						
My Inbox 🔻				Q~		Exclude Junk SI	how All Unread Flagged	
Message Folders 4	🗂 🚧 💡 📵 🥩 From	Subject	Received	Size		ent ≜	•	
🖕 Inbox 🔨					Search All Folders			
💪 Outbox				(•	Search All Fields			
i⊠ Sent Items					Search From/To Only			
↓ Drafts				-				
📉 Templates								
1 Deleted Items								

9. Added ability to filter by Note Type in the Journal Activities.

🧟 Bill Buchanan - Contact				-	×
File Edit Format Attachment Too	ols Window Help				
Save and Close 📄 Save	I I I I I I I I I I I I I I I I I I I	🕅 👘 👻 Follow Up			
Linked Categories: 📋 📋 Gold Clien	nts, RRSP				
General Home Business Other	Journal Activities Misc. Contact Infor	mation KYC Info Tax			
Journal Activities					
🍺 Open 🔗 📂 🖄	🔔 🧌 🔍 Quick Searc	h One-line View	Multi-line View Type: Websites Vie	ew: All	~
Туре	Description	Categories/Tags	All Date Appointment/Event	^	
			Task		
			Note		
			Invoice Email		
			Client Notes		
			Websites		
			Follow Up		
			Reference annual		
			phone call		
			Biking		
			Boardroom		
			Client		

- 10. Individual UVC user account storage notifications have been improved and will notify you before reaching the limit.
- 11. Added the ability to insert Symbols and Special Characters in email messages.

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	Insert Special Character			_			-			<u></u>
	Insert Symbol					×				
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- 12. Updated spellcheck engine to newer patch version to fix some issues.
- 13. Improved searching on shared folders for partial hits and other improvements.
- 14. Updated spellcheck engine to newer patch version to fix some issues.

15. A new User Activities report under the Analytic Dashboard to show a quick view of activities for users in your team.

Inbox Contacts	🞢 Tasks 🛛 🛎 Calendar 📔 🏠 Noter 🤝 Analytics Dashboard 🛛 🔗 Tickets 🛛 🎕 Projects 🛚 🌉 File Store 🗋 🧫 Inv	pices
Report Type: User Activities v Jser: Alex Blanchet v Contact:	Dute Range From: 1-Oct-2016 To: 1-Nov-2016	
Jou	rnal Activities Dashboard	
154 Total Touch Points	6 Total Notes	
111 Meetings	6 General Notes	
33 Linked Emails 4 Tasks		
125		
100 75 50 25		
75 19 50		

- 16. Increased the length of the Custom Field description and allows for multi line label and HTML support.
- 17. When sorting order is changed to From or To the system will now only search by From/To. Can be overridden if needed.
- 18. Added ability to define notes types in User Manager so they apply to everyone.

Options and Preferences				×
Coptions and Preferences Control Cont	Note Types Module Type: Note Mod	ule 🗸	Workgroup	New Note Type Delete Rename
				OK Cancel

19. Add ability to set Service Profile task templates that are fixed time based and not related to review date. For example having a task for RRSP season follow ups.

関 Service Pr	ofile Item	×
Description: RRSP	RRSP Offset Type: Day V Offset: 0	
	Use Fixed Review Date: 🖉 23-Dec-2016)
Arial	✓ 12 ✓ B I U = = = = = = = = = = =	
		^
		,
Repeat Recip	ients	
Repeat		
	No Repeat Day Day/Week Month Year Special	
	Stop Repeat	
	OK Cancel	

20. Added new Ticket Module tab to allow for searching, reporting and filtering by tickets.

lnbox 🧕 Contacts	nced Search 🛛 Show My Da		Analytics Dashboar	no	jects 🛛 🌆 File Store							-
Tickets										Q Qu	ick Search	_
Current View	Ticket Summary											
Open Tickets	Email Queue New	Open F	Reassigned Forw	arded Escalated	Clased/Reselv	ed SLA's Not I	Met SLA's Met	O/S Tickets A	un Duration			-
All Tickets	Email Queue	TOpen Tr	Reassigned Porw	arded Escalated	Closed/Resolv	ed SLA S NOT I	viet I SLA's Met I	0/5 lickets A	vg Duration			-
Outstanding Tickets												
Completed Tickets												
All - Don't Filter on SLA												
SLA Not Met	From	Rating	Owner Name Ree	quest Request Sub	Ticket # Status	Received	Reply Date	Duration	SLA Status	Assignee	Redirected To	
SLA Not Met - Responded	riom	Rating	Owner Name Re	duest Request Sub	incket # Status	Neceiveu	Reply Date	Duration	SEA Status	Assignee	Redifected to	
SLA Not Met - No Response												
SLA Met												
Categories/Tags:												
All ~												
	-											
Multi-Select Show Tickets For												
Show Tickets For testipc1@ipcc.org	-											
Show Tickets For												

Defect Corrections

- 1. Fixed issue with Note Module showing notification that note has been modified even though it has not.
- 2. UVC will now only show one "Re:" in the subject line after multiple replies.
- 3. Fixed issue when printing an appointment when it is opened from the Journal Activities. In some cases it was showing a white page.
- 4. Fixed rare issue where the Search option would no longer work on the Contact and Inbox module.
- 5. Fixed Commit changes when saving invoice if product is still in edit mode.
- 6. Fixed Message thread is showing empty when you click on shared message.
- 7. Fixed issue with forwarding e-mails not including attachments when image signature used.
- 8. Fixed the import option with CSV contact files.
- 9. Fixed mail merge print not working when selecting contacts from shared contact list.
- 10. Fixed issue when showing dynamically linked e-mails in inbox, it was case sensitive.