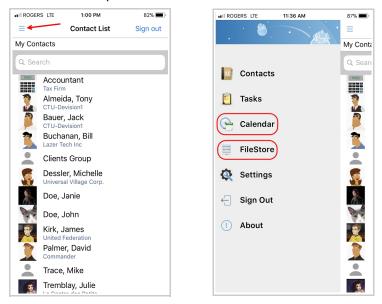


## WHAT'S NEW - UVC MOBILE APP VERSION 2.0

Two major modules have been added to the new version of the UVC mobile APP. When you click on the menu button you will see:

- the Calendar option and
- the FileStore option

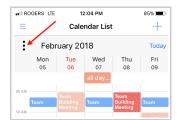


# THE CALENDAR MODULE

1. Clicking on the **Calendar** option will allow you to see the calendar(s).

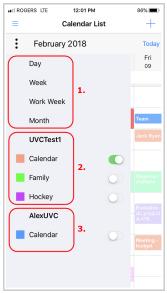


2. Click on the 3 dots located on the upper left corner to view the calendar menu options.



- 3. The calendar menu options are separated in three sections:
  - I. calendar views (day, week, work week, month)
  - II. your calendars (default and custom calendars)

III. other users UVC calendars that are shared with you



4. Select the **calendar view** you would like by selecting one of the 4 choices below:





(Day view)



•II ROG	ERS LTE		12:05 PM		8	35% 🔳			
=		Cal	endar L	.ist		+			
:	February 2018								
Sun	Mon	Tue	Wed	Thu	Fri	Sat			
28	29	30	31	1	2	3			
		•••	•••	•	•••				
4	5	6	7	8	9	10			
	•••	•••	•••	•••					
11	12	13	14	15	16	17			
	•••	•••	•••	•••	•••				
18	19	20	21	22	23	24			
	•••	•••	•••	•••	•••				
25	26	27	28	1	2	3			
	•••	•••	•••	•••	•••				
4	5	6	7	8	9	10			
	•••	•••	•••	•••	•••				
Month	View)								

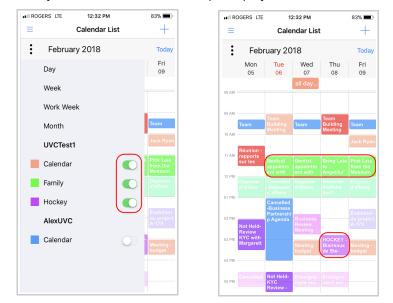
(Month View)

Take note: the user options that will be applied to the UVC Mobile APP calendar are the start/end time and the option to **Apply tag color to cell background.** These 2 options are configurable in the UVC application under **File -> Options and Preferences -> Calendar -> Calendar Options**.

The current default time-division for the calendar is **30 minutes**. This allows for better description display for each appointment on the calendar(s).

5. To **enable or disable your own calendars** from any calendar view simply slide the slider to either to the left (disabled) or the right (enabled).

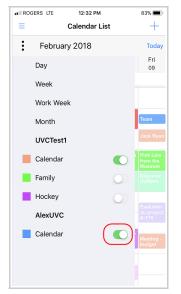
Finally click on a calendar view option (day, week, work week or month) to see the enable calendar(s).



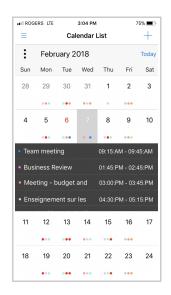
Take note: selected calendar(s) will use the default cell background tag color or the custom color you have chosen for that specific calendar.

6. To **view a calendar that is shared** with you enable it in the calendar menu options.

Finally click on a calendar view option (day, week, work week or month) to see the enabled calendar(s).



IN ROGERS LTE	12:42 PM	20% 💶
Calendar List	Meeting Agenda	Edit
🛎 Meeting	Agenda	
Start:	2018-02-07 1:4	5:00 PM
End:	2018-02-07 2:4	5:00 PM
Priority:		Normal
Status:	Co	onfirmed
Time Zone:	No Ti	me Zone
Category Typ	be: E	Business
Created By:	יט	VC Test1
Tags:	In	nportant
Notes		
Finance – Busin Agenda Februar	ess Process Review Meeti y 7th 2018	ng
I. Review Agend	la	
I. Review Meeti	ng Notes – December 17,	2017
II. Action Item U	Jpdates:	
	Delete	
M	0	
General	Attachm	ents



85%

Sat

10

17

24

3

10

 To view appointments on a specific day on the month view simply select the desired day.
 A list of all appointments will be displayed.

To view the details of a listed appointment tap on it.

Take note: you can tap once on the date field to jump to any particular date

9. On any of the calendar views two options (located on the upper right) will be at your disposal:
- the + symbol option allows you to create a new appointment
- the Today option brings you back to today's date

	ERS LTE 12:04 PM	85%	ull R	DGERS LTE		2:04 PM		85% 🔳		GERS LTE		12:05 PM		
=	Calendar List	(+)	=		Cale	ndar List		(+)	=		Ca	lendar I	List	
:	February 2018	Today	:	Feb	ruary 20	18		Today	:	Febr	ruary 2	:018		
	Tuesday 06 Feb 2018			Mon 05	Tue 06	Wed 07	Thu 08	Fri 09	Sur	Mon	Tue	Wed	Thu	Fri
						all day			28	29	30	31	1	2
	am Building Meeting		09 AM	Team	Team Building	Team	Team Building	Team			•••		•	•••
			10 AM		Meeting		Meeting	Jack Ryan	4	5	6	7	8	9
			11 AM	Réunion - rapports sur les							•••	•••		•••
			12 PM					Délouran	11	12	13	14	15	16
			01 PM					d'affaire		•••	•••	•••	•••	•••
an	celled-Business Partnership Agenda				Cancelled -Business Partnershi			Évalution	18	19	20	21	22	23
			02 PM	Not Held- Review	p Agenda			du project A-170		•••	•••	•••	•••	•••
			03 PM	KYC with Margarett				Meeting - budget	25	26	27	28	1	2
			04 PM							•••	•••	•••	•••	•••
01	t Held-KYC Review - Ronald Anderson		05 PM		Not Held- KYC Review -	Enseigne ment sur			4	5	6	7	8	9
			06 PM							•••				•••

Take note: as an alternative you have the ability to **tap twice** on a time slot (day, week or work week view) or specific day (month view) to create a new appointment.

10. To **create a new appointment** simply select a time slot or date (month view) and click on the + symbol or tap twice to open the new appointment screen.

all RC	GERS LTE	2	:44 PM		77% 🔳
=		Cale	ndar Lis	t	+
:	Febr	uary 20	18		Today
	Mon 05	Tue 06	Wed 07	Thu 08	Fri 09
AM			all day		
AM -	Team	Team Building Meeting	Team	Team Building Meeting	Team
w.		meening		meening	Jack Ryan
AM -	Réunion - rapports sur les		(		
PM -			Déjeuner	Déjeuner	Déjeuner
PM -		-Déjeuner d'affaire	d'affaire		
2 PM -		Cancelled -Business Partnershi p Agenda	Business		Évalution du project
	Not Held- Review KYC with	p Agenda	Review Meeting		A-170
3 PM	Margarett		Meeting - budget		Meeting - budget
PM -					
5 PM -		Not Held- KYC Review -	Enseigne ment sur		

Enter any relevant information associated to the new appointment.

IN ROGERS LTE	4:16 PM	71% 🔳
Cancel		Save
Description		
Location		
Start Date:		
2018-02-08	11:00 AM	
End Date:		
2018-02-08	11:30 AM	
All Day Event:		$\bigcirc$
Time zone:		
No Time Zone		
Calendar:		
UVCTest1	Calendar	
Status:		
None		
Priority:		
Normal		
Show space as:		
Busy		
Attendees:		
Invite people		
Linked Contacts:		
Add linked contac	t	
Repeat:		0
Reminder:		$\bigcirc$
Note:		

Take note: the **Attendees** and **Linked Contacts** option will display contacts located under your current My Contacts list including the Default address book contact list you have selected in UVC. This option is configurable in the UVC application under **File** -> **Options and Preferences** -> **Contact** -> **Contact Options** -> **Default address book**.

11. Click the **save** button to add the new appointment to your calendar.

IN ROGERS LTE	3:50 PM	74% 🔳
Cancel		B Save
Meeting with Bill		
Room 3C		
Start Date:		
2018-02-08	11:00 A	М
End Date:		
2018-02-08	11:30 A	М
All Day Event:		$\bigcirc$
Time zone:		
No Time Zone		
Calendar:		
UVCTest1	Calendar	
Status:		
Confirmed		
Priority:		
Normal		
Show space as:		
Busy		
Attendees:		
Invite people		
Duchanan Dill		

II ROGERS LTE	3:50 PM		74% 🔳
Cancel			B Save
Attendees:			
Invite people			
💄 Buchanan, I	Bill		x
💄 Doe, Janie	ancel tendees: Invite people Buchanan, Bill Doe, Janie Add linked contact Buchanan, Bill Doe, Janie Buchanan, Bill Doe, Janie Poekly Veekly Very 1 week n: Sun Mon Tue Wed Thu		
Linked Contacts:			
Add linked cor	ntact		
💄 Buchanan, I	Bill		x
💄 Doe, Janie			x
Repeat:			C
Weekly			
every 1 week			
on: Sun Mon	Tue Wed	Thu	Fri Sat
Stop Repeat			U.

II ROGERS	LTE	3:	50 PM	:	74% 🔳		
Cancel					L	Save	
L Doe,	Janie					x	
Repeat:							
Weekly							
every 1 w	eek						
on: Sun	Mon	Tue	Wed	Thu	Fri	Sat	
Stop Repeat	t					$\bigcirc$	
Reminder:							
2018-02-	-08		10	:30 AN	1		
UVC Instanc	t Mess	age:				$\bigcirc$	
Email:							
alex@trus	stmail.o	са					
Mobile Emai	il:					$\bigcirc$	
Mobile En	nail						
Note:							
Review K for TFSA	YC Mal	ke sur	e all pa	perwo	rk is s	igned	

12. To **edit an appointment** simply tap once on it and the edit screen will pop-up. Click on the **edit** button to make any modifications.

IN ROGERS LTE	4:16 PM	71%
		$\sim$
Calendar Lis	t Meeting with Bill	Edit
🛎 Meeting	with Bill	
Location:		Room 3C
Start:	2018-02-08 11:	00:00 AM
End:	2018-02-08 11:	30:00 AM
Priority:		Normal
Status:	C	Confirmed
Time Zone:	No T	ime Zone
Category Ty	pe:	Business
Created By:	ι	JVC Test1
Alert Date:	2018-02-08 10:	30:00 AM
Repeat:	Every 1 week(	s) on Thu
Linked Conta		Buchanan, Doe, Janie
Notes		
Review KYC		
Make sure all pa	perwork is signed for TF	7SA
	Delete	
	ſ	
General	Attach	ments

Click the **save** button once all modification are completed.

II ROGERS LTE	12:37 PM	80% 🔳
Cancel		Save
Meeting with Bill		
Room 3C		
Start Date:		
2018-02-08	11:00 A	M
End Date:		
2018-02-08	11:30 A	М
All Day Event:		$\bigcirc$
Time zone:		
No Time Zone		
Calendar:		
UVCTest1	Calenda	r
Status:		
Confirmed		
Priority:		
Normal		
Show space as:		
Busy		
Attendees:		
Invite people		
Repeat:		$\cap$

13. If the appointment you want to edit is a repeated appointment select either the option **this instance only** or **all instances**.

II ROGERS LTE	12:37 PM	80% 🔳
Calendar Lis	at Meeting with Bi	ill Edit
🛎 Meeting	with Bill	
Location:		Room 3C
Instance Sta		2018-02-08 11:00:00 AM
Instance En	d:	2018-02-08
Serie	This is a repeat appointment	2-08 2 AM
Prior	I would like to edit	rmal
Statu Time	This instance onl	med <sup>y</sup> Zone
Cate	All instances	ness
Created by.		Uve Test1
Alert Date:	2018-02-08	5:30:00 AM
Repeat:	Every 1 wee	ek(s) on Thu
Notes		
Review KYC		
	Delete	
RR.		0
General	A	ttachments

The option **this instance** only will allow you to edit only the selected appointment you are currently viewing.

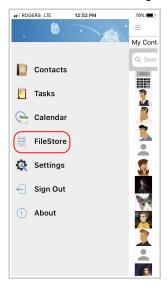
The option **all instances** will allow you to edit all appointments linked to the appointment you are currently viewing.

14. To view any attachment linked to an appointment click on the **attachments** button. Click the **calendar list** button to go back to your calendar view.

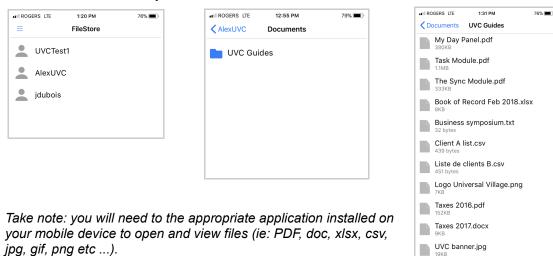
IN ROGERS LTE 12:37 PM	80% 🔳	II ROGERS LTE	12:51 PM	79% 🛙
Calendar List Meeting w	ith Bill Edit	Calendar List	leeting with Bill	Ed
🛎 Meeting with Bill		Taxes 2016	5.pdf	
Location:	Room 3C			
Instance Start	2018-02-08 11:00:00 AM			
Instance End:	2018-02-08 11:30:00 AM			
Series Initial Sta	2018-02-08 11:00:00 AM			
Priority:	Normal			
Status:	Confirmed			
Time Zone:	No Time Zone			
Category Type:	Business			
Created By:	UVC Test1			
Alert Date: 2018-02	-08 5:30:00 AM			
Repeat: Every 1	week(s) on Thu			
Notes				
Review KYC				
Delete				
M		RR.	0	
General	Attachments	General	Attachm	ients

### THE FILESTORE MODULE

1. Clicking on the **FileStore** option will allow you to see files and folders you have saved in your File Store module in UVC including any files and folders that other UVC users are sharing with you.

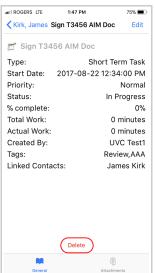


2. Select the desired UVC username to view their shared files and/or folders. Click the file to view it on your mobile device.



### TASK MODULE

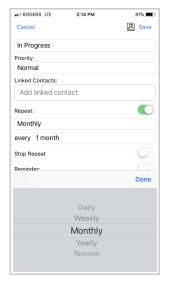
1. When editing an in-complete task you have the ability to delete it directly from the UVC mobile APP. Click the **delete** button to execute this action.



Take note: **deleting a task** can either be done through the task module as well as the Journal Activities of the selected contact.

2. Option to configure a **repeat** on new or existing task(s). This option can be configured under the task module or the contacts Journal Activities.

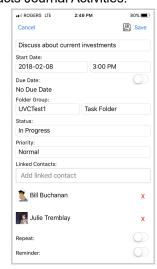
II ROGERS LTE	2:14 PM	81% 🔳
Cancel		Save
Description		
Start Date:		
2018-02-08	2:14 PI	N
Due Date:		$\bigcirc$
No Due Date		
Folder Group:		
UVCTest1	Task Fold	er
Status:		
In Progress		
Priority:		
Normal		
Linked Contacts:		
Add linked contact	t	
Repeat:		0
Reminder:		$\bigcirc$
Note:		



3. You can now **link a contact** to a new or existing task. This option can be configured under the task module or the contacts Journal Activities.

IN ROGERS LTE 2	14 PM	Ę	31% 🔳
Cancel			Save
Description			
Start Date:			
2018-02-08	2:14 PM		
Due Date:			$\bigcirc$
No Due Date			
Folder Group:			
UVCTest1	Task Folder		
Status:			
In Progress			
Priority:			
Normal			
Linked Contacts:			
Add linked contact			
Repeat:			0)
Reminder:			$\bigcirc$

II ROGERS LTE	2:49 PM	80% 🔳
Cancel		E Save
Due Date:		$\bigcirc$
No Due Date		
Folder Group:		
UVCTest1 Jack Bauer	Task Folder	·
James Kirk		
Janie Doe		
John Doe		
Julie Tremblay		
J		0
🖹 Bill Buchanar	1	x
q w e r	t y u	iop
a s d	fghj	k I
φ z x	c v b n	m 🗵
123 😄 🄱	space	Done



#### NOTE MODULE

1. When editing an in-complete note you have the ability to delete it directly from the UVC mobile APP. Click the **delete** button to execute this action.



Take note: **deleting a note** can currently only be performed through the Journal Activities of the selected contact.

#### CONTACTS MODULE

1. Click on the **settings** option to select which contact status you want to view. Your options are All Active, Personal, Business, Prospect and Inactive contacts.

I ROGERS LTE	2:15 PM	81% 🔳 '	II ROGERS LTE	2:15 PM	81% 🔳
≡	Settings	Done	=	Settings	Done
Contact Settin	igs		Contact Setti	ngs	
Group By:			Group By:		
Personal/Busin	ness		Personal/Bus	iness	
/iew:			View:		
All Active		J	Business		
Show and Sort Na	ame By:		Show and Sort N	lame By:	
Last First			Last First		
Task Settings			Task Settings		
Group By:			Group By:		
Start Date			Start Date		
∕iew:			View:		
Active tasks			Active tasks		
Assigned tasks (0	Owner):		1		Done
				All Active	
				Personal	
				Business	
				Prospect	
				Inactive	

Take note: by default your view will be All Active contacts.

 UVC Mobile App now defaults to the Default Contact list as defined in the UVC application. This option is configurable in the UVC application under File -> Options and Preferences -> Contact -> Contact Options -> Default address book.