

What's New – UVC Version 9.0 Update 1

Enhancements Version 9.1

1. New White Labeled Insurance Statement report is now available (Add-on option).

| YourBusiness | | |
|--|--|------------------------------|
| | Your Advisor: | |
| Bill Buchanan Lazer Tech Inc | John Doe | |
| 35 Antares Drive, Suite 200 Ottawa, ON K2E 8B1 | 35 Antares Drive, Suite 200 Ottawa, ON K2E 881 Canada john.doe@uvctest.ca | |
| Life Insurance Melanie | | |
| Owner | Net Death Benefit | Net Cash Value |
| Assumption Life Policy#1234 1 Yr. Term Bill Buchanan Values as of 18–Nov–2020 | \$70,000.00 | \$450,000.00 |
| | | |
| Total Melanie | \$70,000.00 | \$450,000.00 |
| | \$70,000.00 \$70,000.00 | \$450,000.00 \$450,000.00 |
| Total Melanie | | |
| Total Melanie Total Life Insurance | | |
| Total Melanie Total Life Insurance Living Benefits | \$70,000.00 | |
| Total Melanie Total Life Insurance Living Benefits Cynthia McMahon | \$70,000.00 | \$450,000.00 |

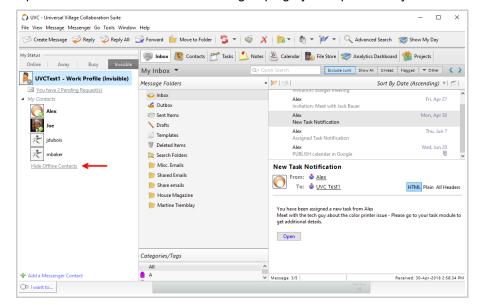
- 2. Added a new option in UVC User Manager to disable ticketing based on From.
- 3. Added the total number of records seen in notes module.

| New Note Open Delete Forward via e-mail Inbox Contacts Forward via e-mail Each data Wy Notes Contacts Forward via e-mail Each data My Notes Contacts Forward via e-mail Each data My Notes Contacts Forward via e-mail Each data I Description * Linked Co Linked Co Calinsurance company to inquire about the transfer Conage of beneficiary Julie Tremb Debrief of day 6 Bueur, Jack Phone John Doc to inquire about the deductions in John Doc Mark TisA to be signed Michelle Data | r Sile Store A A Quick Search | Analytics Dashboard | Projects e Type: All I Summ Note D | View: All | ✓ Share ✓ 10 |
|---|-------------------------------|---------------------|------------------------------------|-----------|--------------|
| My Notes My Notes | Q Quick Search | Status On Hold | e Type: All | Arial | |
| Excription Linked Co Cali insurance company to inquire about the transfer Cali insurance company to inquire about the transfer Change of beneficiary Julie Tremb Debrief of day 6 Bauer, Jack Phone John Doe to inquire about the deductions in John Doe Talk to James about the RESP he wants to move mo | ontacts Note Type | Status On Hold | Summ Note D | Arial | |
| | | On Hold | A Summ Note D | | ~ 10 |
| Call insurance company to inquire about the transfer Julie Tremb Debrief of day 6 Bauer, Jack Phone John Doe to inquire about the deductions in John Doe Talk to James about the RESP he wants to move mo | ay (Le C | | Summ Note D | iary: | |
| Change of beneficiary Julie Tremb Debrief of day 6 Bauer, Jack Phone John Doe to inquire about the deductions in John Doe Talk to James about the RESP he wants to move mo | 'ay (Le C | | Note D | | |
| Debrief of day 6 Bauer, Jack Phone John Doe to inquire about the deductions in John Doe Talk to James about the RESP he wants to move mo | lay (Le C | Cancelled | | | |
| Phone John Doe to inquire about the deductions in John Doe Talk to James about the RESP he wants to move mo | | Cancelled | Crea Last Modif | | Save Changes |
| Talk to James about the RESP he wants to move mo | Reference | On Hold | | | |
| | | Pending | | | |
| TFSA to be signed Michelle De | | Pending | | | |
| | ssler (Un | Partially Done | | | |
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| 7 item(s) found | | | | | |

4. The amount of selected records is now seen in all UVC modules.

| ch Note Type: All View All Vie |
|--|
| On Hold On Hold Cancelled Linked Contacts: John Doe to inquire about the Note Date: 26-Sep-2017 Linked Contacts: John Doe |
| On Hold Summary: Phone John Doe to inquire about the Note Date: 26-Sep-2017 Cancelled Linked Contacts: John Doe |
| |
| On Hold Last Modified: Today 12:21:56 PM Save CH |
| Pending |
| Pending |
| Partially Done |
| |
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5. Option to Hide Offline Contacts when grouping by Group for buddy list.



6. Added a special check when searching by email or phone numbers if the value is blank.

| O UVC - Universal Village Collaboration File View Contact Messenger Go Too | | | | - 🗆 × |
|---|---------------------------------------|-----------------------------|---|--------------------|
| | Delete S Forward VCard S Print 👘 🔻 | 🚧 Follow Up 📑 Detail Pane | 🔍 Advanced Search o Show My Day | |
| 🕨 🧊 Inbox 🚺 Contacts 💇 T | fasks 🔔 Notes 🍓 Calendar 퉳 File Store | 🤝 Analytics Dashboard 😤 Pr | rojects | |
| My Contacts 🔻 | | Catego | ories/Tags: All 🗸 View: All Active | ~ Share |
| O Match all of the following | latch any of the following | | Saved Searches: Default | ~ |
| Phone | is | | | + |
| | | | | Save |
| 🔎 Name 🔻 🛛 📋 | Service Profile Birthday | Date Company | Contact Detail File Attachments Journal Activities | |
| | Gold Clients Gold Clients 1-Jan-197 | 5 Lazer Tech Inc | Bill Buchanan Lazer Tech Inc VP Operation | |
| B C D W F G H J K J K | | | Mailing Address 35 Antares Drive, Suite 200 Ottawa, ON CANADA K2E 881 Show on Map | , |
| , , , | | | | 📥 - |
| | | | Contact Notes 1.Feb-2016 3:27:36 PM Call from 15147999090: Bill is calling me about his R | RSP contributions. |
| 3 item(s) found | | | BrdJ Rev ≪€ | |

- 7. Optimization improvements in the Task Module which helps when you have a large number of historical tasks.
- 8. Contact Module report engine has been overhauled with better custom field printing and rich text notes.
- 9. Drag and drop enhancements.
- 10. Improvements were made to the Show My Day panel.

Invoice Module

- 1. Added the ability to enter decimal values for quantity.
- 2. Ability to enter notes for each invoice item.

Defect Corrections

1. Repeated appointment instances no longer change when approving calendar invites.