Notes

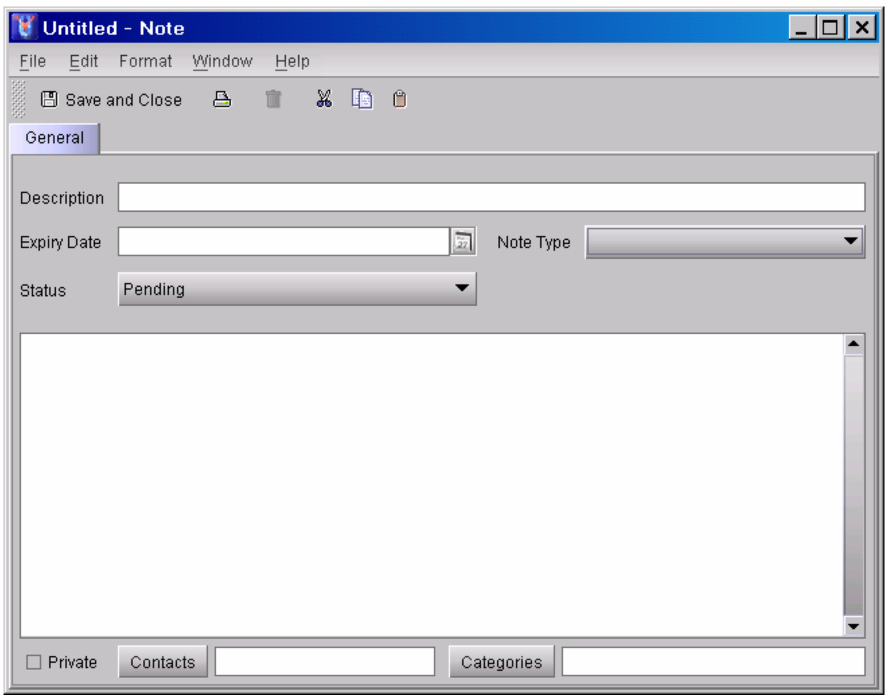
You are able to add reference notes in this area. Notes can be grouped by nothing, categories you set up or by Address Book Contacts they are linked to.

To access the notes area if you are in the Tab view simply click on the **Notes** tab, if you are in the Special view simply click on the large **Notes** button on the left.

To Add a New Note

To add a new task to the database use the following steps:

1. Right click anywhere on the note screen and select **New Note** from the menu.



2. Fill out the appropriate information for the note you are adding.

Description

This is a description or title of a note that will be available on the main note screen for your reference.

Expiry Date

The expiry date can be used if a note is only relevant to a certain date. You are able to search for notes that have expiry dates between dates you specify. However, if a expiry date is not known or does not apply the field can be left blank.

Note Type

The note type allows you to put a note into a group that you have already set up (Options and Preferences). If you have put your note into note types you are able to search and sort by your types on the screen.

Status

You are able to give your notes a status and search by notes with that status on the screen.

Categories

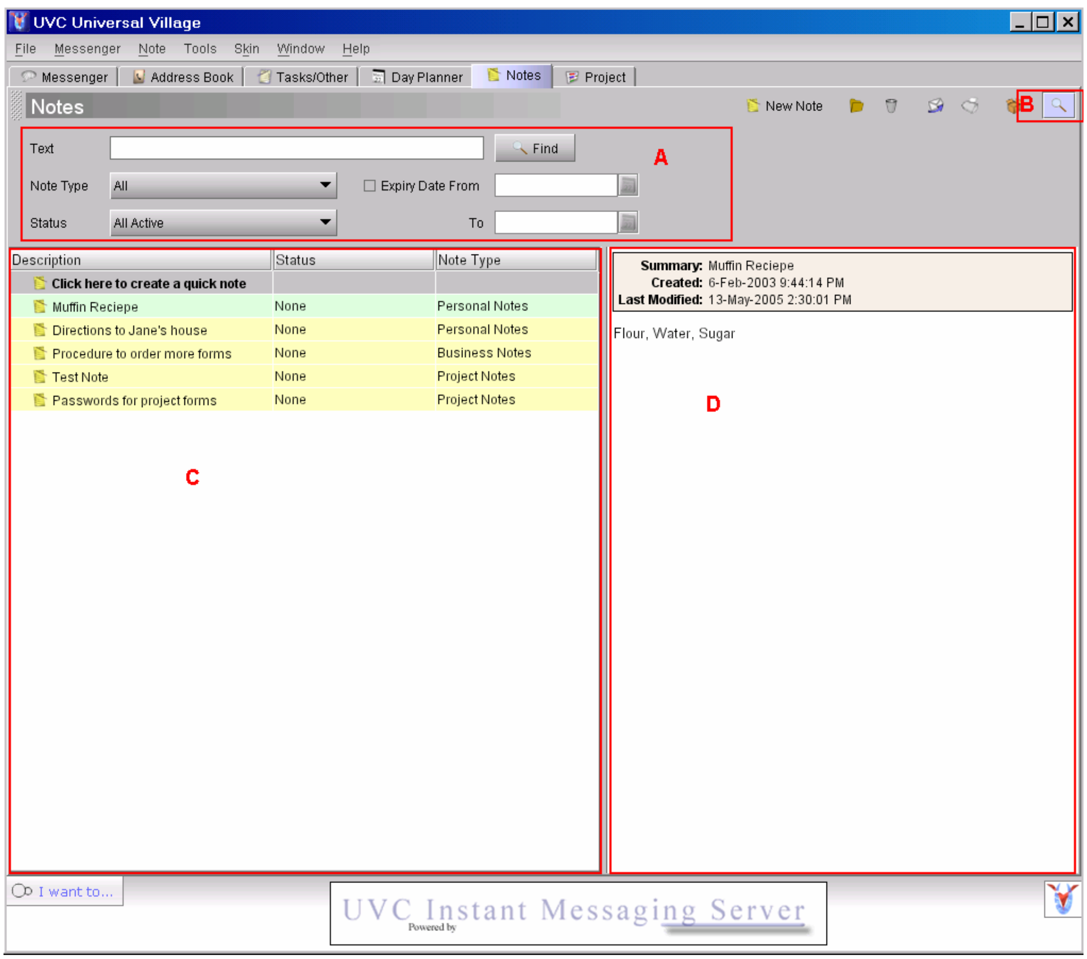
You are able to put your notes into different categories that you have already set up (Options and Preferences) so that you are able to group, search and print by them in the module.

Contact

You are able to assign a Note to an Address Book contact. This is especially useful when dealing with clients. If you do assign a note to a contact the note will show up in the notes module as well as on the Journal Entries tab of the contact information card in the Address Book.

3. (Continued from Above) After entering the appropriate information you can now add the note into the database. You can do this by clicking on **Save and Close** or using the **Enter** key on the keyboard.

Screen Layout



A

The find area allows you to search for notes. This find field will search for any data that was entered on the note information sheet such as description, notes, etc.

B

This button toggles the search fields on or off.

C

The notes that you have searched for will be listed in this area (or if you have not performed a search all your notes will be visible). You are able to customize the column headers to you preference. To customize them simply right click anywhere on a column header. To sort the column click on the header once, to reverse sort click on it twice.

D

This is where your selected note will be displayed.

To Edit an Existing Note

To edit and existing note use the following steps:

1. Locate the note you would like to edit.
2. Double click on the note.
3. If you are editing the information, make the necessary changes and click on **Save and Close** or use the **Enter** key on the keyboard. If you have not made any changes but just wanted to view the information simply click **Cancel** when you are finished.

Changing the Status of a Note

To change the status of a note use the following steps:

1. Locate the note you would like to edit.
2. Double click on the note.
3. Change the status of the note to what you would like.
4. Click on **Save and Close** or use the **Enter** key on the keyboard to close the note box.

To Delete a Note

To delete an existing note use the following steps:

1. Locate the note you would like to delete
2. Right click on the note and then select **Delete** from the menu. You should then get a warning asking if you are sure you would like to delete the note.
3. Click on **Yes** to confirm delete.

Warning: Please exercise caution when deleting notes. The action cannot be reversed.

Note Colours

You are able to change the colour of a note for display purposes. To change the colour of a note please use the following steps:

1. Locate the note you would like to change the colour for.
2. Right click on the note and then select **Note Colour** from the menu.
3. Select the colour you would like.

Your note will now be displayed in the colour you have selected.

Column Headings

You are able to customize your column headings in the note module by removing columns, adding columns and changing the order of columns. You are also able to sort ascending and descending by each column.

To Add or Remove Columns

To add or remove columns to your screen please use the following steps:

1. Right click on the column headers.
2. Place a checkmark beside columns you would like to show and remove the checkmark from columns you would not like to show.

To Move Columns

To move your columns so they are in a different order use the following steps:

1. Left click and hold on the column you would like to move.
2. Drag the column to its new location.
3. Release the mouse.

Column Sorting

To sort your columns ascending or descending use the following steps:

1. Click once on the column header you would like to sort by.
2. Click again on the same column header to sort the data in reverse order.

Group By

In the note list UVC allows you to group your notes by different criteria for display and printing purposes. To group your notes use the following steps.

1. Right click anywhere in the Notes module.
2. Select **Group By** from the menu.
3. Select which option you would like to group your contacts by:

None

No grouping.

Note Types

This will group your notes by the note types that they have been assigned to.

Categories

This will separate your notes by the customized categories that you have assigned to them. Using this function will allow you to group your notes any way you want.

Contact Links

This will group your notes by the Address Book contacts that the notes have been assigned to.

Your tasks will now be grouped according to what you have selected. Please note that for the grouping to be effective you must have some tasks already on the screen in order for them to be grouped. If you do not you will have to search for notes and then group them.

Forward Via Email

You are able to forward a note by email directly from UVC to any contacts that you have an email address for. To do this you must either have your email application already setup and configured or have your Internet browser configured to send emails (this is usually found in you browser's preferences). You are able to send the note to multiple recipients and use cc and bcc functions. To email a note to a contact please use the following steps:

1. Find the note that you would like to email.
2. Right click on the note and select **Forward Via Email** from the menu.
3. A window will now appear that has a box on the left that lists all your contacts. You are able to move the contacts that you would like to send the note to by placing a checkmark in the box beside their name and clicking on the **To>** button in the middle to move the contacts to the box on the right. You are likewise able to take contacts off the list of people you are going to send the note to by placing a checkmark beside them and clicking on the **To<** button in the middle to move them back to the box on the left. You are able to do the same thing for contacts that you wish to cc and bcc. Simply use the **Cc>** and **Bcc>** buttons. If you have a large list of contacts and need to find a specific one you can do this by using the find feature at the top of the screen. This find field will search for any data that was entered on the contact information sheet such as name, address or phone number. You are also able to search by personal or business contacts and by groups.
4. Once you have moved the contacts to the boxes on the right that you would like to send your note to simply click on **Ok**. Your Email application will now be launched and the note information will be on the email as well as all the addresses you selected. You will also be able to write a message on the email. Once this is done simply send the email.

Note: If you wish to send a note as an email to someone who is not in your address book simply leave the To box blank and enter the persons email address when your email program is launched.

Note: If a window does not open allowing you to compose an email, your browser is not configured to send emails. To continue, configure your browser and repeat these steps.

Print

You are able to print 1 report from the Note Module, the Note Detail Report. To print this report use the following steps:

1. Right click anywhere in the Note module.
2. Select **Print** from the menu.
3. The available report will be listed on the left hand side of the screen. Select the report.
4. Once you select your report you will have various options available on the right hand side of the screen. Select the options you would like. The Note Detail Report gives you the option of printing notes for your current search criteria. If you want to use this option it is best to search for the notes that you would like to print on the report before you go into the print menu. You also have the option of selected notes this will include only the notes that you have selected. To select a note click on the note, to select multiple notes use the Ctrl key.
5. Select the type of Output you would like to use from the top of the screen. You are able to choose **Screen**-shows you a print preview, **Printer**-prints to paper, **HTML File**-creates and HTML file or **Adobe PDF**-creates a PDF file.
6. Click on **Ok**.