


Managing Your Reminders and Contact History

Class Syllabus

Topics Covered:

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- I. Locating an Existing Account
 - A. Using the Incremental Search Tool
 - B. Using the Navigation Bar
 - C. Searching via the Account Finder Tool
 - II. Creating New Reminders and Contact History Notes
 - A. Adding a New Reminder from Contact Manager
 - B. Adding a New Reminder from Event Manager
 - C. Creating Automatic Reminders from Contact Manager
 - D. Creating New Automatic Reminders from Event Manager
 - E. Inserting Dynamic Merge Fields into an Auto-Reminder Message
 - F. Creating a New Contact History Note
 - G. Adding a New Contact History Note in Event Manager
 - III. Printing and E-mailing from Contact Manager
 - A. Printing a Letter or Document
 - B. Editing a Merge Letter or Documents On-the-Fly
 - C. Printing Reminder Lists
 - D. Printing Reminders for One Account or for a Date Range
 - E. Sending E-mails from Contact Manager
 - F. Viewing Sent E-mails from Contact Manager
 - G. Re-sending an Email from Contact Manager
 - IV. Customizing Your Contact Manager
 - A. Adding Quickpick List Items to the Reminder Category Field
 - B. Stretching the Grid Pane
 - C. Manipulating the Grid
 - V. Viewing and Managing Active Reminders
 - A. Using the Active Reminders Tool
 - B. Viewing and Editing Reminders
 - C. Retrieving Linked Reminders
 - D. Exporting/Synchronizing Reminders in Outlook
 - VI. Q & A