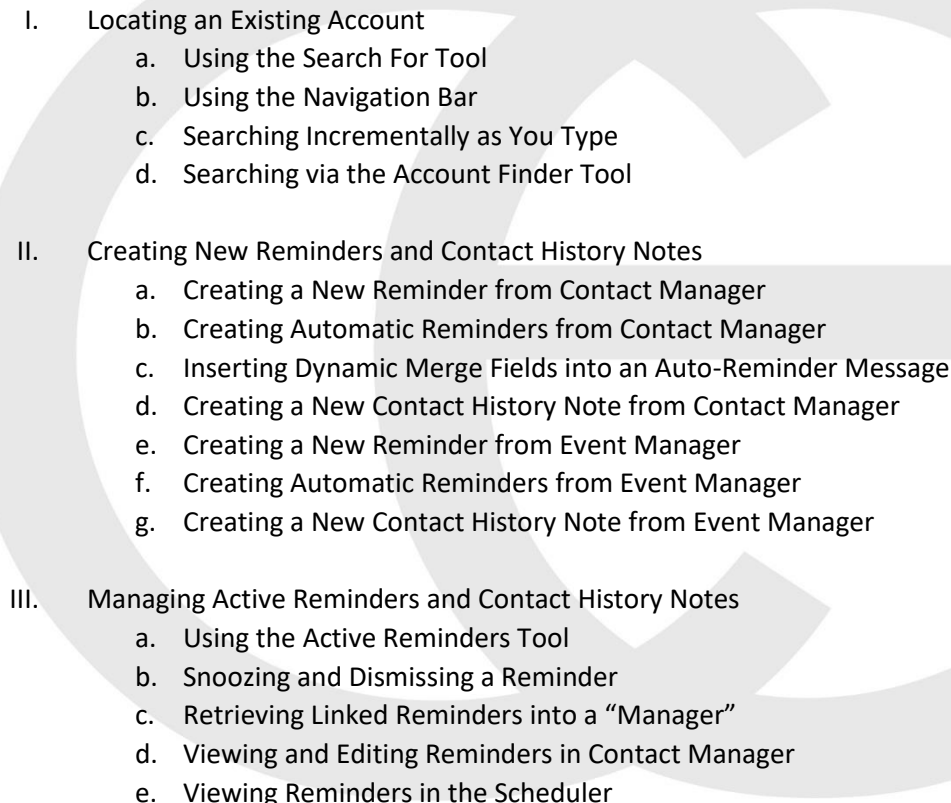


Managing Your Reminders and Contact History in Contact Manager

Class Syllabus

Topics Covered:

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- I. Locating an Existing Account
 - a. Using the Search For Tool
 - b. Using the Navigation Bar
 - c. Searching Incrementally as You Type
 - d. Searching via the Account Finder Tool

 - II. Creating New Reminders and Contact History Notes
 - a. Creating a New Reminder from Contact Manager
 - b. Creating Automatic Reminders from Contact Manager
 - c. Inserting Dynamic Merge Fields into an Auto-Reminder Message
 - d. Creating a New Contact History Note from Contact Manager
 - e. Creating a New Reminder from Event Manager
 - f. Creating Automatic Reminders from Event Manager
 - g. Creating a New Contact History Note from Event Manager

 - III. Managing Active Reminders and Contact History Notes
 - a. Using the Active Reminders Tool
 - b. Snoozing and Dismissing a Reminder
 - c. Retrieving Linked Reminders into a “Manager”
 - d. Viewing and Editing Reminders in Contact Manager
 - e. Viewing Reminders in the Scheduler
 - f. Exporting and Synchronizing Reminders in Outlook
 - i. Exporting/Synchronizing a Single Reminder in Outlook
 - ii. Exporting/Synchronizing Multiple Reminders in Outlook
 - g. Deleting Your Inactive Reminders
 - i. Deleting an Individual Reminder
 - ii. Deleting all Inactive Reminders
 - iii. Automatically Deleting all Inactive Reminders

- IV. Printing and E-mailing from Contact Manager
 - a. Printing a Letter or Document from Contact Manager
 - b. Editing a Merge Letter or Document On-the-Fly
 - c. Printing Reminder Lists
 - i. Printing Reminders for One Account
 - ii. Printing All Reminders for a Day or Date Range
 - d. Printing Contact History Notes
 - i. Printing Contact History Notes for One Account
 - ii. Printing Contact History Notes for a Day or Date Range
 - e. Managing Your Email
 - i. Sending an E-mail from Contact Manager
 - ii. Viewing Sent E-mails from Contact Manager
 - iii. Re-sending an E-mail from Contact Manager

- V. Customizing Your Contact Manager
 - a. Adding Quickpick List Items to the Reminder Category Field
 - b. Adding Quickpick Items to the History Category Field
 - i. Deleting a Quickpick Item
 - ii. Modifying Existing Quickpick Items
 - iii. Rearranging Existing Quickpick Items
 - c. Using the Contact Manager Grid
 - i. Stretching the Grid Pane
 - ii. Manipulating the Grid

- VI. Q & A