

# Managing Your Reminders and Contact History in Contact Manager

## Class Syllabus

### Topics Covered:

- 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