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