

web training syllabus

Creating Reminders and Contact History

Topics covered:

- I. Locating An Existing Account
- II. Managing Reminders
 - A. Adding a new reminder
 - B. Setting reminder views
 - C. Editing reminder details
 - D. Viewing reminder details
 - E. Adding quickpick list Items
- III. Managing Contact History Notes
 - A. Adding a new contact history note
 - B. Editing contact history items
 - C. Viewing contact history items
 - D. Adding quickpick list items
- IV. Creating Automatic Reminders
 - A. From the event date when an event is booked
 - B. From the booked date when an event date is booked
 - C. From the revised date when an existing date is changed
 - D. Viewing/editing automatic reminders
 - E. Deleting automatic reminders
- V. Managing Reminders using the Current Reminders Tool
 - A. Retrieving a linked reminder item
 - B. Creating an automatic contact history note
- VI. Adding Reminders/Contact History Notes From Event Manager & Guestrooms Manager
 - A. Using the Toolbar button
 - B. Adding from a print screen
 - C. Adding from an email window
- VII. Adding Reminders/Contact History Notes From Account Manager & Prospect Manager
 - A. Using the Toolbar button
 - B. Using the tabs
- VIII. Tracking Reminders Notes
 - A. Printing reminders for one account
 - B. Printing all reminders for a day or date range
- IX. Tracking Contact History Notes
 - A. Printing contact history notes for one account
 - B. Printing all contact history notes for a day or date range
- X. Q & A

Important Notes:

- High-speed web access is required.
- Payment in full must be made prior to the class.
- Caterease is not responsible for loss of connection, either by the student or by the moderator. If a student cannot attend a class due to technical problems, he or she will be allowed to attend at a later date. If a moderator is forced to cancel a class due to technical problems, that class will be rescheduled. No monies will be refunded.

