

Table of Contents – Time Matters 9.0 Intermediate Training

| | |
|--|------------|
| LESSON 1: NOTES, PHONE CALLS, MAIL, OUTLINES | 6 |
| NOTE RECORDS..... | 6 |
| PHONE RECORDS..... | 11 |
| MAIL RECORDS..... | 14 |
| OUTLINE RECORDS..... | 18 |
| EXERCISE 1..... | 26 |
| LESSON 2: DOCUMENTS | 28 |
| LINKING DOCUMENTS TO TIME MATTERS..... | 29 |
| OPENING A LINKED DOCUMENT..... | 34 |
| USING TM SAVE..... | 36 |
| EXERCISE 2..... | 37 |
| LESSON 3: LINKING OUTLOOK EMAIL & ATTACHMENTS | 40 |
| LINKING EMAIL WITHOUT ATTACHMENTS..... | 40 |
| LINKING EMAIL WITH ATTACHMENTS..... | 44 |
| LESSON 4: SEARCHING FOR DOCUMENT FILES | 48 |
| PERFORMING A SEARCH..... | 48 |
| EXERCISE 4..... | 52 |
| LESSON 5: SORTING LISTS, COLUMN LAYOUT & QUICK TABS | 54 |
| SORTING LISTS..... | 54 |
| COLUMN LAYOUT..... | 55 |
| QUICK TABS..... | 56 |
| EXERCISE 5..... | 67 |
| LESSON 6: PRINTING REPORTS | 70 |
| FORMATTING & FILTERING REPORTS..... | 70 |
| PRINTING A SINGLE RECORD..... | 71 |
| PRINTING LISTS..... | 74 |
| PRINTING CALENDARS..... | 77 |
| CUSTOMIZING REPORTS..... | 80 |
| EXERCISE 6..... | 86 |
| LESSON 7: FORMATTABLE CLIPBOARD | 88 |
| SETUP A FORMATTABLE CLIPBOARD FORMAT..... | 88 |
| USING THE FORMATTABLE CLIPBOARD..... | 92 |
| TIME MATTERS INSIDER..... | 93 |
| USING TM INSIDER..... | 93 |
| EXERCISE 7..... | 95 |
| LESSON 8: MERGE TEMPLATES | 98 |
| CREATING MERGE TEMPLATES..... | 98 |
| USING MERGE TEMPLATES..... | 104 |
| EXERCISE 8..... | 105 |
| APPENDIX A: DATABASE MAINTENANCE | 108 |
| DAILY PROCEDURE – BACKUP DATABASE..... | 108 |
| WEEKLY PROCEDURE – RE-INDEX DATABASE..... | 111 |