



## Web Training Session 2 Agenda

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### Constituent Management

- 1. Overview of the Master Biographical Module*
- 2. Adding, Editing and Deleting Records*
- 3. Setting Up Reminders (Actions)*
- 4. User Defined Fields (and the More Bio tab)*
- 5. Bio Defaults*
- 6. Searching*
- 7. Recent & Favorite Bio's*
- 8. Reporting*
- 9. Mailings*

### QUESTIONS