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Overview

This article walks through the steps to access your **Trail Blazer** database on a **Mac** via the free **Microsoft Remote Desktop 10** app. It also goes through the steps to **map** your local Mac **directories** (which allows you to perform tasks like importing / exporting spreadsheets, and to upload images from your Mac into TB). This article also shows how to **map** your local **printers**, and provides some best practices for logging into and out of your remote desktop connection.

Note: It's advised that you utilize **Microsoft Remote Desktop 10** for RDP if your Mac is running OS X 10.11 or later. *If* you're running on an older version of Mac OS, you can instead utilize <u>Microsoft Remote Desktop 8</u>.



Tip: Utilizing a mouse with a right/left click button will make your life a lot easier when accessing **Trail Blazer** on a Mac. For instance, it will make **copying-and-pasting** a lot easier by making providing access the context menu in the software with the right-mouse button.

Outline

#1 Download Microsoft Remote Desktop 10 on the Mac App Store

#2 Configure Microsoft Remote Desktop 10 for Access to your Trail Blazer Account

#3 Configuring your Connection for Access to your Local Printers and Directories (for Importing / Exporting Images and Spreadsheets)

#4 Logging In and Out of your Remote Desktop, Printing, and Exporting

#5 Related Resources

#1 – Download Microsoft Remote Desktop 10 on the Mac App Store

Navigate to the Apple App Store on your Mac.

Search for the keywords "Microsoft Remote Desktop 10".









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Click the **[GET]** button.



Enter your Apple ID username, password, and click [Sign in]. My example is below.



1. Enter your Apple ID username and password.

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|---|--------------------------------------|---|--|---|----------------------------------|---------------------|
| Å | Sign i If you Store o Apple | in to downlo have an Apple I or iCloud, for ex ID, click Create Apple ID: | ad from the ID, sign in with xample, you ha Apple ID. | App Store. In it here. If you ave an Apple ID | have used the). If you don't | e iTunes have an |
| | Forgot | Password: t Apple ID or Pa | essword? | Can | cel | ign In |

After you've entered your Apple ID credentials you can click [INSTALL APP].



| $\langle \rangle$ | Featured | Top Charts |
|--|----------|------------|
| Search Results for "microsoft remote desktop 10" | | |
| Microsoft Remote Des Business ******* 639 Ratings INSTALL APP | | |
| | | |
| | | |

Once the download and install is complete, click the **[OPEN]** button.



| <> | | Featured | Top Charts | Categor |
|----|---|----------|------------|---------|
| | Search Results for "microsoft remote desktop 10" | | | |
| | Microsoft Remote Des Business ★★★☆☆ 639 Ratings | | | |
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| | | | | _ |

You'll likely be prompted with a message asking if you want to provide feedback to Microsoft during the usage of their application. Click 'Yes' or 'Not now', depending on your preference.





select 'yes' or 'not now' KNOWLEDGE BASE <u>www.trailblz.com/kb</u> depending on your preference



At this point the main configuration screen of the Remote Desktop will open, and the orange application icon will appear in your "dock". In order to make it easier for quick access to your Trail Blazer database in the future, it's good idea to "pin" the application to your dock. You can do this by **right-clicking** on the application icon.



right-click on the application icon

And then select **Options** > **Keep in Dock**.





Section #2 covers how to configure the Microsoft Remote Desktop for access to your Trail Blazer database.



#2 – Configure Microsoft Remote Desktop 10 for Access to your Trail Blazer Account

After completing the steps in **Section #1** to download, install, and launch the Microsoft Remote Desktop 10 application, you'll be brought to the main configuration screen (shown below).



main landing page of the microsoft remote desktop 10



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Click [Add Desktop] to begin creating a connection to your organization's Trail Blazer remote desktop.



| • • • | Microsoft Remo | ote Desktop | |
|--|---|-------------|----------|
| :: = ☆ · + · | Desktops | Feeds | Q Search |
| Add your first de connection to g Add Desktop Import your dat Remote Desktoj Import | esktop et started. a from Microsoft o 8. | | |

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Enter the **PC name**: appserver.trailblz.net



| | Microsoft Remote Desktop |
|----------------|---|
| ∷ ≡ ♦ • + • | Desktops Feeds Q Search |
| Add Desktop | |
| PC name: | appserver.trailblz.net |
| User account: | Ask me every time |
| General | Display Devices & Audio Folders |
| Friendly name: | Optional |
| Group: | Saved Desktops |
| Gateway: | No gateway ✓ Bypass for local addresses |
| | Reconnect if the connection is dropped Connect to an admin session Swap mouse buttons |
| | Cancel Add |

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Next you'll want to click on the User account drop-down and select Add User Account...



Configuring Microsoft Remote Desktop 10 (Accessing Trail Blazer on a Mac) – Manning Brinters Local Directories, and More Mapping Printers, Local Directories, and More

| • • | Microsoft Remote Desktop |
|--------------------|---|
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| Add Desktop | |
| PC name: | appserver.trailblz.net |
| User account: • | / Ask me every time |
| | Add User Account |
| General | Display Devices & Audio Folders |
| Friendly name: | Optional 2 |
| Group: | Saved Desktops |
| Gatoway | |
| Gateway. | ✓ Bypass for local addresses |
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| | Reconnect if the connection is dropped Connect to an admin session |
| | Swap mouse buttons |
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| | |
| | |
| | Cancel Add |
| | |

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(if you don't add a user account you will need to enter your credentials every time you connect)



| | Microsoft Remote Deskto | Q Search |
|--|--|---------------------------|
| | Add User Account | |
| | Username: Domain\user or user@do | omain |
| | Password: Optional | |
| | Friendly name: Optional | |
| | C | Cancel Add |
| | Group: Saved Desktops | \$ |
| After selecting to add a u acount, this screen will c | ser Gateway: No gateway splay. | \$ ses |
| If you don't know your cr you'll want to either cont of your db admins or trai tech support). | Reconnect if the connect Connect to an admin se Swap mouse buttons blazer | ction is dropped ssion |
| | (| Cancel Add |





Note: if you don't know your RDP credentials you'll want to request them from one of your db admins or Trail Blazer tech support.

Enter your **Username**, **Password**, a **Friendly name**, and then click the **[Add]** button. *These credentials are shared by all users at your organization* that access TB this way. A "friendly name" is simply and easy way to find your desktop connection when logging in.

(my example is below)



| 000 | | Microsoft Remote Desktop | | |
|--------------|----------------------------|---|---|-------------------------------------|
| | * • + • | Desktops Feeds Q Search | | |
| | Add User Accour | nt | | |
| | Username | : CastomerPlaygroundMP @trailblz.net | | (example rdp credentials) |
| | Password | : ••••• | | (example rup el cuelliais) |
| | Friendly name | : Trail Blazer | | 1) Enter your Username |
| | 1 | Cancel Add | | Password, and a "friendly name". |
| | Group: | Saved Desktops | | · · |
| | Gateway: | No gateway | | |
| | | Bypass for local addresses | | |
| this nam | is simply a e to easily | Reconnect if the connection is dropped Connect to an admin session Swap mouse buttons | | |
| find desl | your remot top when | te | | |
| logg | ing in | Cancel Add | 2 | |
| | | | | <u>ilblz.com/kb</u> 22 |



After adding your user account, you'll likely have to enter the Friendly name a second time on the main RDP configuration screen. My example is below.



| | Microsoft Remote Desktop |
|--------------------|---|
| ** | Desktops Feeds Q Search |
| Add Desktop | |
| PC name: | appserver.trailblz.net |
| User account: | Trail Blazer |
| General | Display Devices & Audio Folders |
| Friendly name: | Trail Blazer |
| oroup: | Saved Desktops |
| Enter the Gateway: | No gateway |
| Friendly name. | Bypass for local addresses |
| | ✓ Reconnect if the connection is dropped Connect to an admin session |
| | Swap mouse buttons |
| | |
| | Cancel |
| | |
| | |



At this point you *could* select **[Add]** and you'll be ready to log into your database.

The next two sections show some **important** steps on configuring the RDP app for access to your **local printers** and **directories**. Configuring these two extra items now is advantageous as it allows you to do things like print, import/export spreadsheets, and upload images from your local Mac into your database (for things like email and letter templates).

However, you can always return to do this at a later point if preferred.

#3 – Configuring your Connection for Access to your Local Printers and Directories (for Importing / Exporting Images and Spreadsheets)

After completing the steps in section #1 and #2, you can navigate to the **Display** tab. It's a good idea to check the box for **Start session in full screen**. *If you have multiple computer monitors and/or different sized monitors, you can adjust these settings under this tab as well (such as the resolution). The majority of the time you will just leave these settings as the defaults.*



| | | Microsoft Remote Desktop |
|------|------------------|---|
| | ■ * · + · | Desktops Feeds Q Search |
| ~ \$ | Edit Desktop | |
| | PC name: | appserver.trailblz.net |
| | User account: | Trail Blazer |
| Troi | General | Display Devices & Audio Folders |
| Irai | Resolution: | Default for this display |
| | Color quality | Use all monitors Start session in full screen Fit session to window High (32 bit) Optimize for Retina displays Only recommended for connections to Windows 10, Windows Server 2016, and later. Update the session resolution on resize Only available when connecting to Windows 8.1, Windows Server 2012 R2, and later. |
| | | Cancel Save |

It's a good idea to have this setting checked so that Trail Blazer properly displays in full screen after first logging in.

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Navigate to the Devices & Audio tab and check the boxes next to Printers and Clipboard. This will allow you to copy-and-paste from your local Mac to the remote desktop and to **print** from RDP to your local printers.



configuring the remote desktop app for access to your local printer(s) and clipboard

| | | Microsoft Remote Desktop |
|------------------------|--|---|
| # ■ * • | · + • | Desktops Feeds Q Search |
| ✓ S Edit Des | ktop | |
| | PC name: | appserver.trailblz.net |
| Use | r account: | Trail Blazer |
| Trai Choo config | General se the device gure remote a Redirect A | Display Devices & Audio Folders s that you want to use in the remote session and nuclio settings. Printers Smart cards Clipboard Microphone On this computer |
| | | Cancel Save |

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The final configuration steps (which are very important) will be to navigate to the Folders tab > check the box next to Redirect folders > and click the [+] in the lower-left.



configuring the rdp for access to your local mac directories for importing/exporting purposes

| | | Microsoft Remote Desktop | |
|--------|-----------------------|--|--|
| | ☆ ~ + ~ | Desktops Feeds Q Search | |
| Υ § Εα | dit Desktop | | |
| | PC name: | appserver.trailblz.net | |
| | User account: | Trail Blazer | |
| | General | Display Devices & Audic Folders | |
| Trai | Choose the folders | s that you want to access in the remote session. | |
| | Redirect fold | lers | |
| | Name | Path | |
| 2 | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | + - | | |
| | K | | |
| | 3 | Cancel Save | |

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This will open up a file directory for your local machine (*example below*).



example: browsing a local mac for directories

| | E III III - Desktop - iCloud C A Search |
|---|---|
| Favorites | Jim.Repos ► Pat's Stuff CD Simulator42.15.png ► |
| Downloads | |
| iCloud | |
| Desktop | |
| 🖺 Documents | |
| Devices | |
| Tags | |
| O Home | |
| Important Purple | |
| | Cancel Open |



Browse for and select the area on your machine that you want to provide access to and from the remote desktop (a popular choice would be Desktop, as shown below).



browse for and select the area on your local mac that you want to map the remote desktop to (for import/exporting purposes) my example is below

| | ≡ 💷 🚟 ► 🛆 De | sktop — iCloud | | Q Search |
|-------------------------------|--------------------|-----------------|-------------------|------------|
| Favorites | Jim.Repos | | | |
| Recents | Simulator42.15.png | C43 P | | |
| Applications | | | | |
| Downloads | | | | |
| iCloud | | | | |
| Cloud Drive | | | | |
| 🔜 Desktop 1 | | | | |
| Documents | | | | |
| Devices | | | | |
| Remote Disc | | | | |
| Tags | | | | |
| Home | | | | |
| Important | | | | |
| Purple | | 11 | | 2 |
| | | | Са | Incel Open |
| | KNC | WLEDGE BASE www | v.trailblz.com/kb | 34 |



After you browse for and select your local directory, you can click [Open] in the lower-right (shown above), and then click [Save] to finish. My example is below.



example of a mapped directory

| Edit Desktop | | |
|------------------|---|------------------|
| PC name: | appserver.trailblz.net | |
| User account: | Trail Blazer | |
| General | Display Devices & Audio Folders | |
| Choose the folde | rs that you want to access in the remote session. | |
| Redirect fold | ders | |
| Name | Path | |
| Desktop | /Users/patrickhanf/Desktop | |
| | | |
| | | |
| | ` | |
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| + - | | |
| | | |
| | | |
| | Cancel | |
| | ·····• | ww.trailblz.com/ |



If everything looks good, click [Save] in the lower-right to finish configuring your remote desktop connection (shown in the screenshot above).

After saving, you'll be brought back to the main login screen of the Microsoft Remote Desktop 10 application where your new connection will display. My finished *example* is below.



| ● ● ● | Microsoft Remote Desktop Desktops Feeds Q S | earch |
|--------------|---|----------------------|
| Trail Blazer | | |
| finished ex | ample of a remote desi | ktop |
| connection | for trail blazer | <u>ailblz.com/kb</u> |



You can always return back to edit these settings in the future if needed. To do this, hover your mouse cursor over your saved desktop and select the **pencil (edit)** icon.



| | | | | | _ |
|------------------------------------|---------------|------------|--------|----------|---|
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| · + • | Desktops | Feeds | | Q Search | |
| | | | | | _ |
| Saved Desktops | | | | | |
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| Trail Blazer | | | | | |
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| if you need to | a edit vo | ur se | tting | 2 | |
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| in the future, | nover y | our n | nouse | • | |
| over the save | ed desk | top aı | nd cli | ck | |
| the pencil (e | dit) icon | | | | |
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Continue on to section #4 to learn the best practices for logging into and out of your remote desktop connection, and how to export and print.

#4 – Logging In and Out of your Remote Desktop, Printing, and Exporting

The final section covers the log in and log out process, and how to run a print and export from the Remote Desktop to your local machine.

Tip: to make logging in and out easier in the future, **keep** the Remote Desktop application in your **dock** (shown below in two steps).

Step 1 – Right-click on the Orange Remote Desktop 10 Icon





right-click on the application icon

Step 2 – Select Options > Keep in Dock





To log in, launch the Remote Desktop 10 application (either by using the Spotlight search in the top-right of your Mac's desktop, or by clicking the orange icon from the dock). The more common method is to launch the application from your dock, as shown below.





Launch the Remote Desktop 10 application by clicking on it.

Double-click on the Trail Blazer remote desktop (created in section #1). *My example is below.*



| • • • ::: = * • + • | Microsoft Remote Desktop Desktops Feeds | Q Search | |
|---------------------------|--|------------------------|---------------|
| ✓ Saved Desktops | | | |
| | | | |
| I fall Blazer | | | |
| | | | |
| | N | | |
| Double-click connection t | on the remote o begin the logi | desktop in process. | |
| | | | |
| | | | ailblz.com/kb |
| | | | |



The first time you log in you may get a prompt asking you to 'forward your printers and clipboard' to the remote desktop. If you get this you can check the box for "don't show me this again" and continue.

You'll be brought to the remote desktop home screen where you can double-click on the Trail Blazer icon to launch the program.



Configuring Microsoft Remote Desktop 10 (Accessing Trail Blazer on a Mac) – Manning Brinters Local Directories, and More Mapping Printers, Local Directories, and More





That will bring up the login screen where you'll enter your *unique* username and password for your database and then click [OK].

Enter your unique credentials and click [OK].

| Trail Blazer Version 6.2.6803.22168 |
|--|
| S TrailBlazer™ Organize. Leverage. Succeed. |
| Please enter your user id and password: |
| User ID: |
| Password: 1 |
| Show password |
| Progress |
| |
| 2 |
| |
| Setup 8 OK Cancel |

This will log in you into the application where the first thing you'll see is the Start Page (this keeps you up to date on what's changing with the software). If your screen is small, you can click the magnify button in the top-right of the application. KNOWLEDGE BASE www.trailblz.com/kb 48





When you first log in you'll be brought to the Start Page which keeps you up to date on what's happening at Trail Blazer.

| 22 | | | |
|--------------|----------------------|-----------|--|
| ecycl | Trail Blazer Version | 1 6.2.680 | 03.22168 Pandamonium!! (Playground) - [Start Page] |
| | Settings Help | | 🛁 – 🗗 🗙 |
| | Application Menu | ~ | |
| 5 | | | Welcome to the Start |
| 2 | Tasks | = | Dege |
| scor | Dashboard | ^ | Page |
| | | | |
| | A Scalendar/Tasks | | Support: 1 Email: |
| 6 | B Daily Calendar | = | 866-909-8700 support@trailblz.com |
| \mathbf{r} | Events | | |
| Log | Event Participants | | |
| | Event Venues | | |
| | Reminders | | · · · |
| Ś | 🙆 Time Log | | You can magnify your screen |
| 2 | Canvassing | | with this icon |
| ail B | ⊿ 鞚 Donor | \sim | with this icon. |
| | Open Windows | = | |
| | 006084 | | |
| | 🔢 Start Page | | |
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To **close** out of the system when you're done working you'll click the red [X] in the top-right.

| ayground) - [Start Page] | _ ē × |
|-----------------------------|-------|
| Welcome to the Start Page | |
| Email: support@trailblz.com | |
| | |
| | |

You'll be prompted with a warning which you can click [OK] on.

Once the database is closed you'll want to double-click on the [Log Off] button on the desktop.





This will complete the full disconnect from your remote desktop (which is important for all users to do when they're finished working).



If you need to run an export on RDP to your local machine you'll start by running your search for the records you want to export and then click the **[Export]** button. Ex:

example export

| Con | Edit tribut | ions [34 | t 🌐 Forma 4635 records 1 | t - 🗊 Wrap | Print 🌐 Pivot | : | | |
|-----|----------------|-----------|-----------------------------|----------------------------|-----------------|---------------|-----|-----|
| | ☑ | ID | Date | Committee | Last Name | First Name | м | Amo |
| | • | 335 | 1/11/2000 | Pandamonium!! (Playground) | Caron | Anne | н. | |
| | ✓ | 335 | 2/11/2000 | Pandamonium!! (Playground) | Caron | Anne | Н. | |
| | ✓ | 335 | 2/18/2000 | Pandamonium!! (Playground) | Williams | Margaret | S., | |
| | ✓ | 335 | 2/25/2000 | Pandamonium!! (Playground) | Hendrickson | Daniel | R. | |

On the far left of the screen you'll need to expand the **Computer** drop-down and select the local Mac directory that you mapped previously. After you select where to export the file to you can click the **[Save]** button. My example is below where.



example export on rdp

| 0 | Save As | | | | | |
|-----------------------------|-----------------------------|--------------------------|-------------------|-------------|-------------------|-----------|
| € 🗇 - ↑ 🚍 | 🛛 🕨 Computer 🕨 Desk | top on Patrick's MacBo 🔸 | | v ¢ | Search Desktop on | Patrick's |
| Organize 🔻 | | | | | | •== • |
| 🔆 Favorites | 1 | Name | Date modified | Туре | Size | |
| N 🚍 10 - 1 | | Pat's Stuff | 8/12/2019 3:53 PM | File folder | | |
| P 調 Libraries | 1 | KDP Screenshots | 8/12/2019 3:53 PM | Filefolder | | |
| 4 🖳 Computer | | | | | | |
| Desktop on P | atrick's MacBo | | | | | |
| ▷ 📬 Network | | 2 | | | | |
| ▷ 👽 Network | K | 2 | | | | |
| ▷ ♀ Network File name: | Export | 2 | | | | |
| File name: Save as type: | Export csv files (*.csv) | 2 | | | | |



You'll get a prompt when the export is finished. You can then go to the location of where you ran your export (in my case it was on the desktop of my Mac) and open the file in a program like Numbers or Excel to manipulate further. Ex:



example completed exported from rdp to a local directory on a mac





To print from RDP to your local printer, select what you want to print in TB and click the **[Print]** button. You *may* need to scroll left and right to find your local printer. Once you see the printer you want to print to, select it, click **[Apply]**, and then click **[Print]**. My *example* is below.



example print from rdp to a local printer (if you don't see your printer, you may have to scroll left or right)

| Calcat Drinter | | |
|--------------------|--------------------------------|---------------------------|
| | | |
| Bullzin PDF | r Drinter | . 1 |
| Microsoft) | Printer (PS Document Writer | |
| | | |
| | | |
| Status: | Ready | Print to file Preferences |
| Location: | | Find Printer |
| Comment: | | |
| Page Range | | |
| IA (| | Number of copies: 1 |
| O Selection | O Current Page | |
| O Pages: | 0 | |
| Enter either a sin | gle page number or a single | 1 2 3 3 |
| page range. For | example, 5-12 | 3 |
| | | |
| | | Print Cancel Apply |
| | | Contraint Papers |



You can also print to a **PDF** printer and save the file(s) to your local machine for printing later (or for attaching to an email). Ex:



printing to a pdf printer from rdp

| neral | | | |
|----------------|---------------------------------|-------------------|------------|
| Select Printer | | 1 | |
| | | • | |
| Add Pri | inter | | |
| Bullzip | PDF Printer | | |
| Res Microso | oft XPS Document Writer | | |
| | | | |
| Ctature | Paadu | Distant file | |
| Location: | Neady | Print to file | references |
| Commont: | Pullaia PDE Printer 11 10 0 27 | EI F | nd Printer |
| comment. | Duizip i Di Thinter II. 10.0.27 | | |
| Page Range | | | |
| • All | | Number of copies: | 1 |
| O Selection | O Current Page | | |
| O Pages: | 0 | Collete | |
| U rayes. | | | 22 23 |
| Enter either a | single page number or a single | 0 | |
| page range. | rorexample, 5-12 | 6 | |
| | | | |
| | Pr | int Cancel | Apply |
| | | | |
| | | | |



When printing as a PDF you'll give the file a name, browse to where you want the file, saved and then click [Save]. My example is below.



example print to pdf from rdp

| Bullzip PDF Printer 11.10 - Create File | |
|--|--|
| General Document Image Watermark Merge Security About | |
| Option Set (Default) Format PDF File Name C:\Users\CustomerPlaygroundNP\Desktop\document.pdf Open destination folder after creation Open the document after creation Append if output exists Email 1. choosse where to save the pdf file | |
| Freeware Edition (max 10 users) 2 Save Merge Cancel | |



Example printed PDF after it was saved to the local desktop on my Mac:

example pdf print saved to a local mac desktop



The help resources below provide quick links to a variety of similar resources.





- YouTube Channel

- Knowledge Base Articles

- 3rd Party Resources

Related Resources

 Article: Adding a New Database User and Setting their Security Settings

 Article: Exporting Data (Spreadsheets) to your Mac, from the Remote Desktop App – Mapping Directories

KNOWLEDGE BASE <u>www.trailblz.com/kb</u>



Article: <u>Configure Microsoft Remote Desktop 8 – For Mac Users (Logging into Trail Blazer on your mac)</u>
Video Playlist: <u>Getting Started</u>
Training: <u>Free Trail Blazer Introduction Training (for New Users)</u>
Download: <u>Microsoft Remote Desktop 10</u>
Download: <u>Trail Blazer Mobile Base Camp (iOS App)</u>
Download: <u>Trail Blazer Mobile Base Camp (Android App)</u>

Trail Blazer Live Support

- **C** Phone: 1-866-909-8700
- Email: support@trailblz.com
- f Facebook: https://www.facebook.com/pages/Trail-Blazer-Software/64872951180
- Twitter: <u>https://twitter.com/trailblazersoft</u>

* As a policy we require that you have taken our intro training class before calling or emailing our live support team.

<u>*Click here*</u> to view our calendar for upcoming classes and events. You can sign up other members on your team for the same training.

* After registering you'll receive a confirmation email with the instructions for how to log into the <u>GoToMeeting</u> session where we host our live interactive training classes.



* This service <u>is</u> included in your contract.