

Microsoft Outlook 2013

Lesson 7

Advanced Contact Management

Objectives

Skills	Exam Objective	Objective Number
Using Electronic Business Cards	Edit contact information	4.1.4
	Share contacts	4.1.7
	Create new contacts	4.1.1
	Create and assign signatures	1.2.2
Finding Contact Information	Search for contacts	1.4.4
	Create new search folders	1.4.1
Managing Multiple Address Books	Manage multiple address books	4.1.8
	Import contacts from external sources	4.1.3
Printing Contacts	Print contacts	1.3.5

Step by Step: Edit an Electronic Business Card

- **GET READY. LAUNCH** Outlook if it is not already running. Use the Gabe Mares contact record that you created in Lesson 6.
 1. If necessary, click the **People** button in the Navigation bar to display the People Hub.
 2. Click **Business Card** in the Current View Gallery. The contacts are displayed as Business Cards.
 3. Double-click the **Gabe Mares** contact. The Gabe Mares —Contact window is displayed.
 4. Double-click on the **Business Card** image. The Edit Business Card dialog box is displayed.

Step by Step: Edit an Electronic Business Card

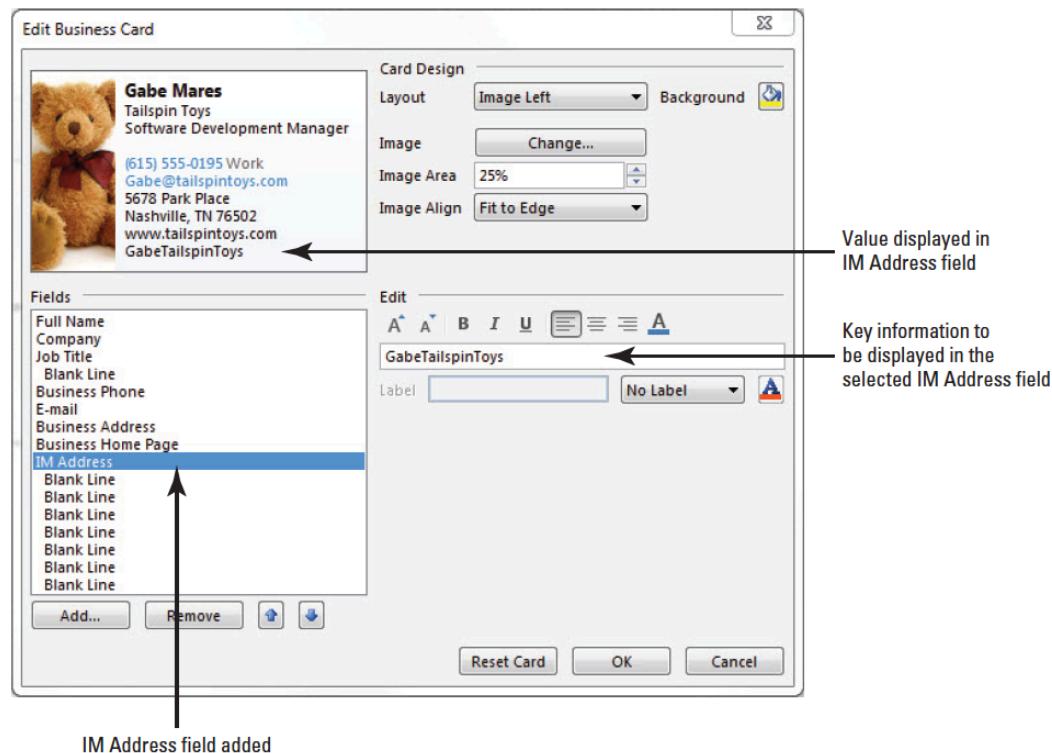
5. In the Card Design area in the upper right of the window, verify that **Image Left** is selected in the *Layout* field and **Fit to Edge** is selected in the *Image Align* field. This defines the position of the graphic. Currently, the graphic is the default gray bar.
6. Click the **Change** button. The Add Card Picture dialog box is displayed.
7. Navigate to the data files for this lesson. Click the **Bear Side.jpg** image file, and click **OK**. The bear image is added to the card preview.

Step by Step: Edit an Electronic Business Card

8. In the Card Design area, click the **Image Align** field. In the dropdown list, click **Bottom Center**. In the card preview, the image is repositioned to appear at the bottom of the card.
9. In the Card Design area, click the **Image Align** field. In the dropdown list, click **Fit to Edge**. In the card preview, the image is resized and fills the entire side of the card.
10. Click the **Add** button. In the dropdown menu, point to **Internet Address** and then click **IM Address**. IM Address is added to the list of fields. The **IM Address** field is used for an instant messaging address.

Step by Step: Edit an Electronic Business Card

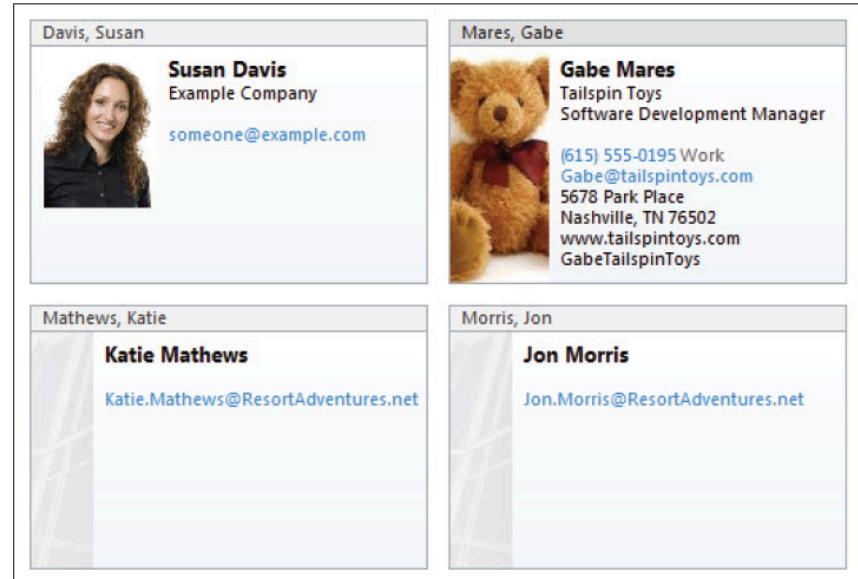
- With IM Address selected in the list of fields, click the empty field in the Edit area. Key **GabeTailspinToy**  sas shown at right. The IM address is now added to the business card.



Step by Step: Edit an Electronic Business Card

12. Click **OK**. The Edit Business Card dialog box is closed. Click the **Save & Close** button. Gabe's business card is displayed, as shown at right.

- **PAUSE. LEAVE** the Outlook Message window open to use in the next exercise.



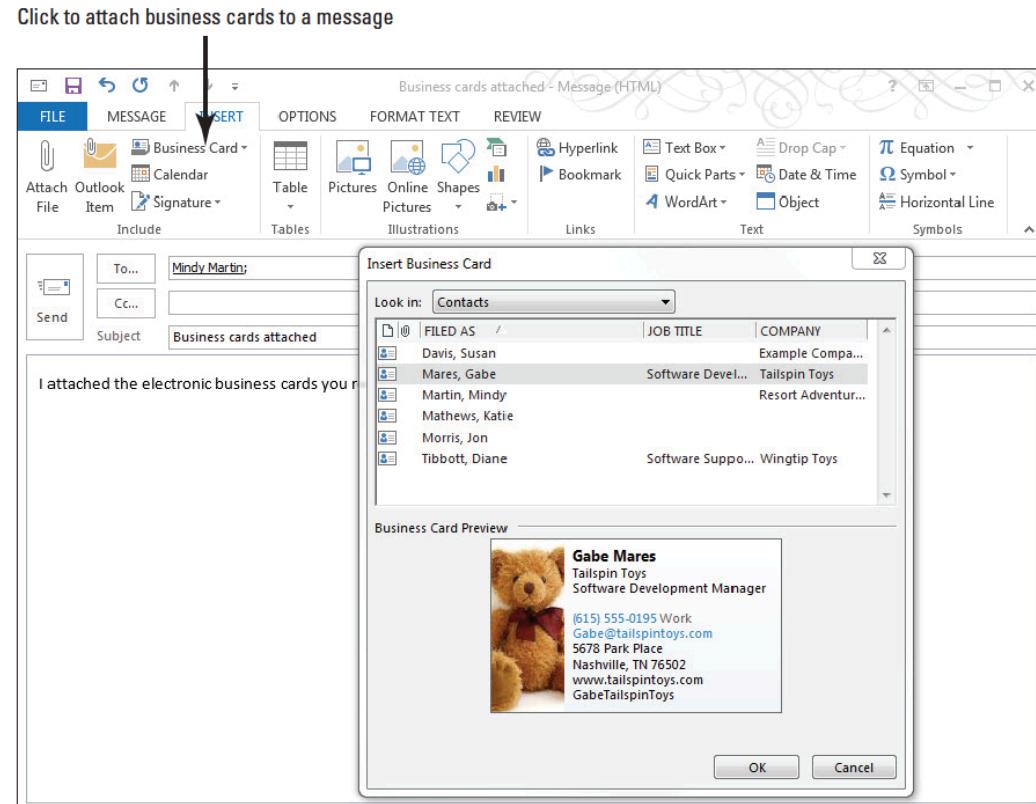
Step by Step: Send an Electronic Business Card

- **USE** the Gabe Mares contact record.
 1. Click the **Mail** button in the Navigation bar to display the Mail folder.
 2. Click the **New Email** button on the HOME tab. The Message window is displayed. By default, the MESSAGE tab is selected.
 3. In the **To** field key **[your email address]**.
 4. In the **Subject** field key **Business cards attached**.
 5. Click in the message area. Key **I attached the electronic business cards you requested.** [Press **Enter** twice] to add a bit of space between your text and the business card that you're about to attach.

Step by Step: Send an Electronic Business Card

6. On the **INSERT** tab in the Include group, click the **Insert Business Card** button. A dropdown list is displayed.

7. Click **Other Business Cards** in the dropdown list. The Insert Business Card dialog box is displayed, as shown at right.

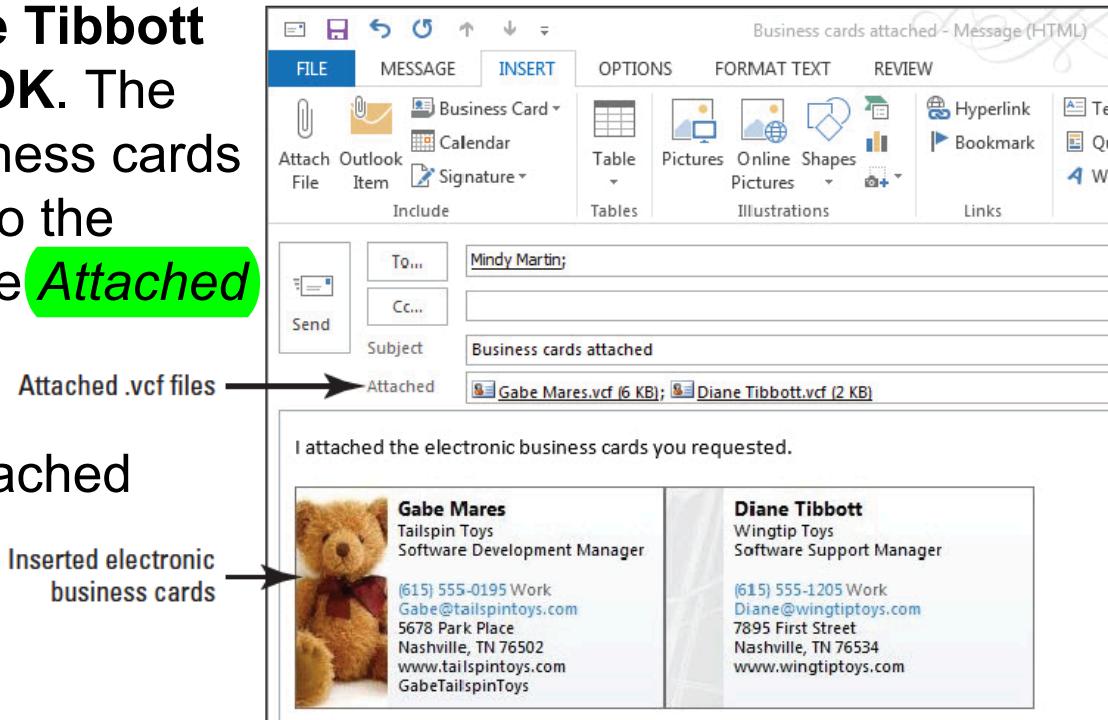


Step by Step: Send an Electronic Business Card

8. Click the **Gabe Mares** contact. A Preview pane at the bottom of the dialog box shows you an image of the business card you have chosen to send with the message.
9. With the contact still selected, [press and hold **Ctrl**]. This allows you to select multiple contacts.

Step by Step: Send an Electronic Business Card

10. Click the **Diane Tibbott** contact. Click **OK**. The electronic business cards are inserted into the message. In the **Attached** field, the contact records are attached as .vcf files, as shown at right.



11. Click the **Send** button.
• **PAUSE. LEAVE** Outlook open to use in the next exercise.

Step by Step: Create a Contact from an Electronic Business Card

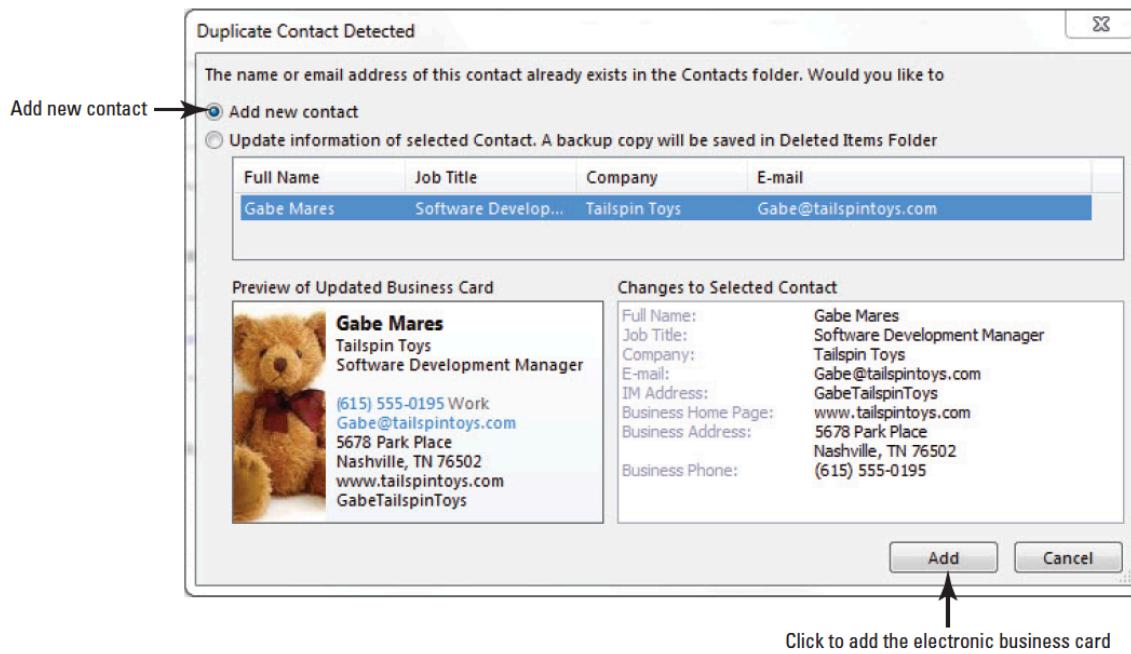
- **USE** the message you sent in the previous exercise.
 1. Click the **Mail** button in the Navigation bar to display the mailbox.
 2. If the *Business cards attached* message has not arrived yet, click the **Send/Receive All Folders** button in the Send/Receive group  of the HOME tab.
 3. Click the **Business cards attached** message in the message list to display it in the Reading Pane. The electronic business cards are displayed in the message body.

Step by Step: Create a Contact from an Electronic Business Card

4. Right-click the **Gabe Mares** electronic business card in the message body. Click the **Add to Outlook Contacts** option in the shortcut menu. A Gabe Mares—Contact window is displayed that contains the information from the electronic business card, including the preview image of the card.
5. Click the **Save & Close** button in the Actions group on the Ribbon. Because the contact record is already in your Contacts folder, Outlook detects that this is a duplicate contact, and the Duplicate Contact Detected window is displayed. If the contact record was not a duplicate, the contact would be saved with no further action needed.

Step by Step: Create a Contact from an Electronic Business Card

6. You want to create a new contact for this exercise, so select the **Add new contact** option at the top of the window. The dialog box changes to show you the information that will be saved in the new contact record, as shown below.



Step by Step: Create a Contact from an Electronic Business Card

7. Click the **Add** button at the bottom of the window. The Duplicate Contact Detected window is closed, the contact record is created, and you are returned to the Mail folder.
8. Click the **People** button in the Navigation bar to display the People Hub. Now, you have the original Gabe Mares contact record and the Gabe Mares contact record you created from the electronic business card in the message.
9. Click the first **Gabe Mares** contact record and click the **Delete** button on the HOME tab. The contact record is moved to the Deleted Items folder. It will not be removed from your computer until the Deleted Items folder is emptied.

- **PAUSE. LEAVE** Outlook open to use in the next exercise.

Step by Step: Use an Electronic Business Card in a Signature

- **USE** the Gabe Mares electronic business card you modified in a previous exercise.
 1. If necessary, click the **People** button in the Navigation bar to display your contacts.
 2. Click the **New Items** button in the New group, and select **Email Message** to open the Message window with the MESSAGE tab selected.
 3. Click the **Signature** button in the Include group on the Ribbon. In the dropdown list, click **Signatures**. The Signatures and Stationery dialog box is displayed.

Step by Step: Use an Electronic Business Card in a Signature

4. Click the **New** button to create a new signature. The New Signature dialog box is displayed.
5. To name the new signature, key **Gabe** into the *Type a name for this signature* field. Click **OK**. The New Signature dialog box is closed, and Gabe is highlighted in the *Select signature to edit* list box.
6. Click in the empty **Edit signature** box. Key the following text, [pressing **Enter**] at the end of each line.

Gabe Mares

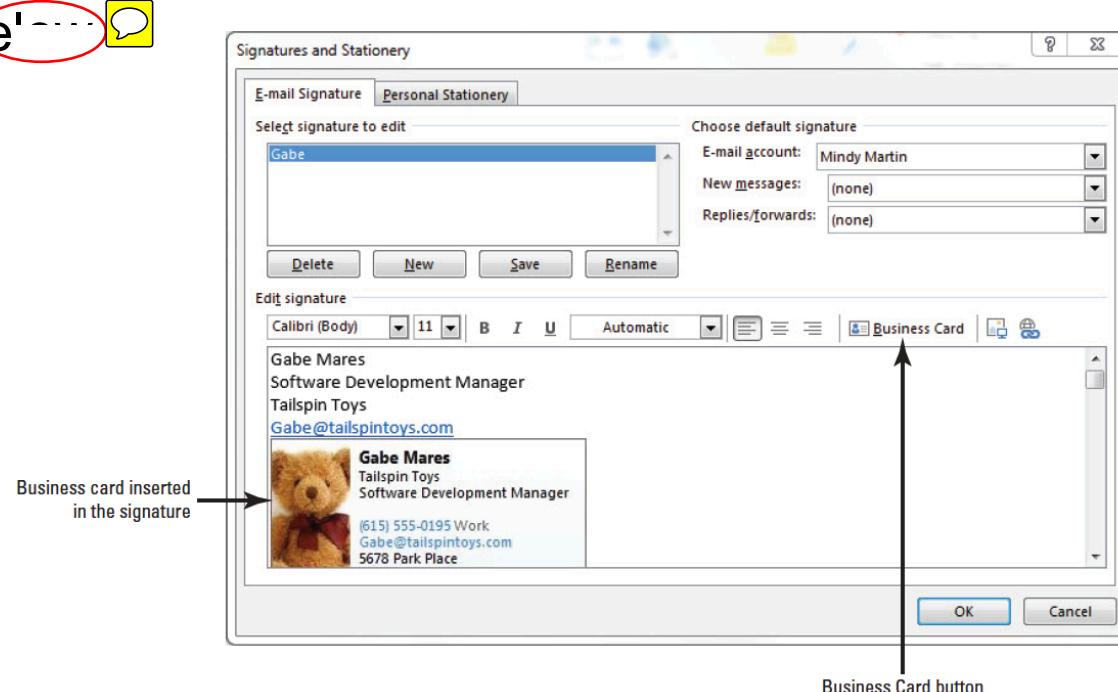
Software Development Manager

Tailspin Toys.

Gabe@tailspintoys.com

Step by Step: Use an Electronic Business Card in a Signature

7. Click the **Business Card** button above the Edit Signature box. The Insert Business Card window is displayed.
8. Click the **Gabe Mares** contact record and click **OK**. The electronic business card is inserted into the signature, as shown below.



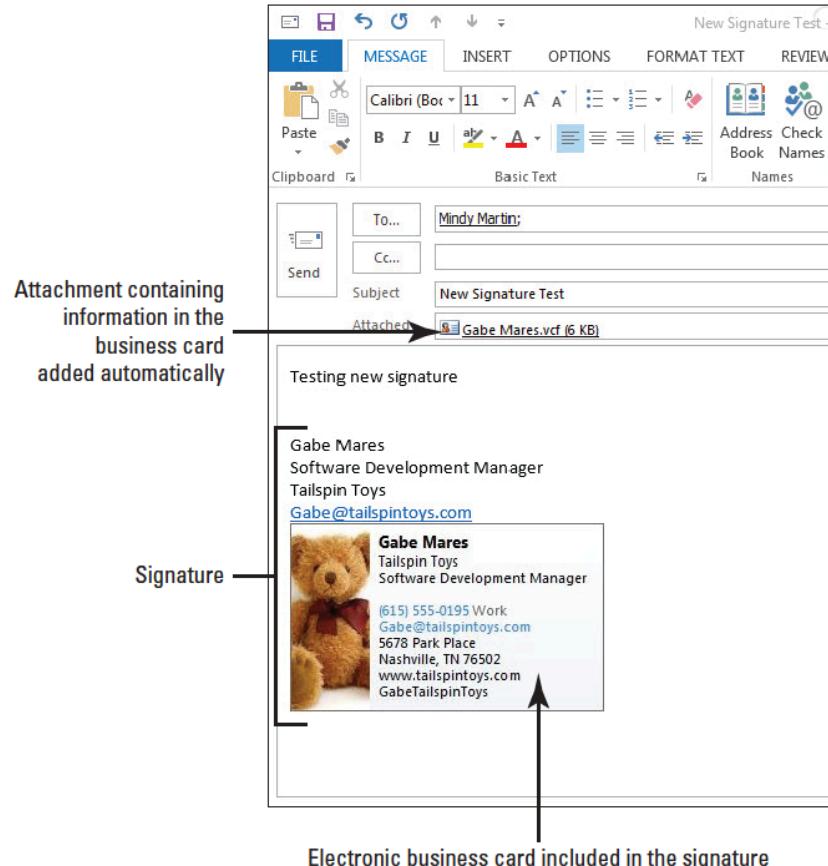
Step by Step: Use an Electronic Business Card in a Signature

9. Click **OK** to accept your changes and close the Signatures and Stationery dialog box.
10. In the Message window, key **[your email address]** in the **To** field.
11. In the **Subject** field, key **New Signature Test**.
12. In the message body, key **Testing new signature** and [press **Enter** twice].

Step by Step: Use an Electronic Business Card in a Signature

13. In the Include group on the Ribbon, click the **Signature** button and then click **Gabe** in the dropdown list of signatures that appears. The signature is inserted into the message, as shown at right.

14. Click the **Send** button.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.

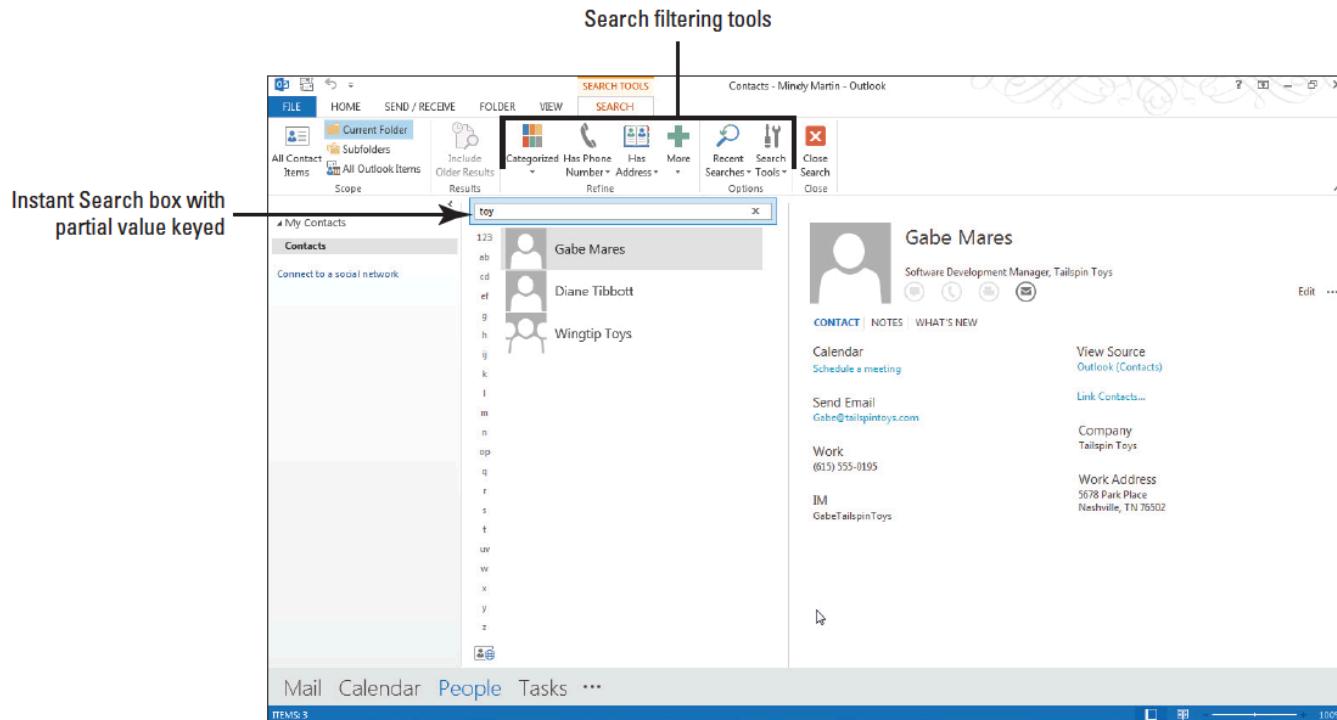


Step by Step: Search for Contacts

- **GET READY. LAUNCH** Outlook if it is not already running.
The contacts used in this exercise were created in Lesson 6.
 1. If necessary, click the **People** button in the Navigation bar and select **People** in the Current View group to display the People Hub.
 2. Click in the **Instant Search** box at the top of the Contact Index. The new **SEARCH TOOLS** tab appears  in the Ribbon.

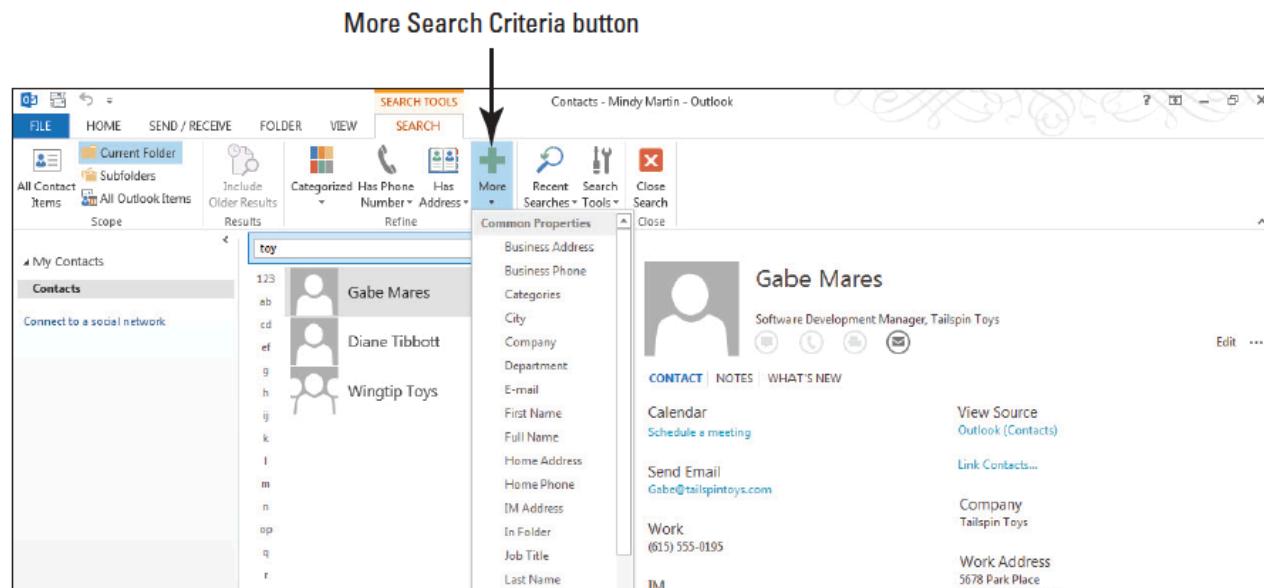
Step by Step: Search for Contacts

3. In the Instant Search box, key **toy**. As you key the search text, Outlook displays all the contacts that contain the text *toy* in any of their fields, as shown below.



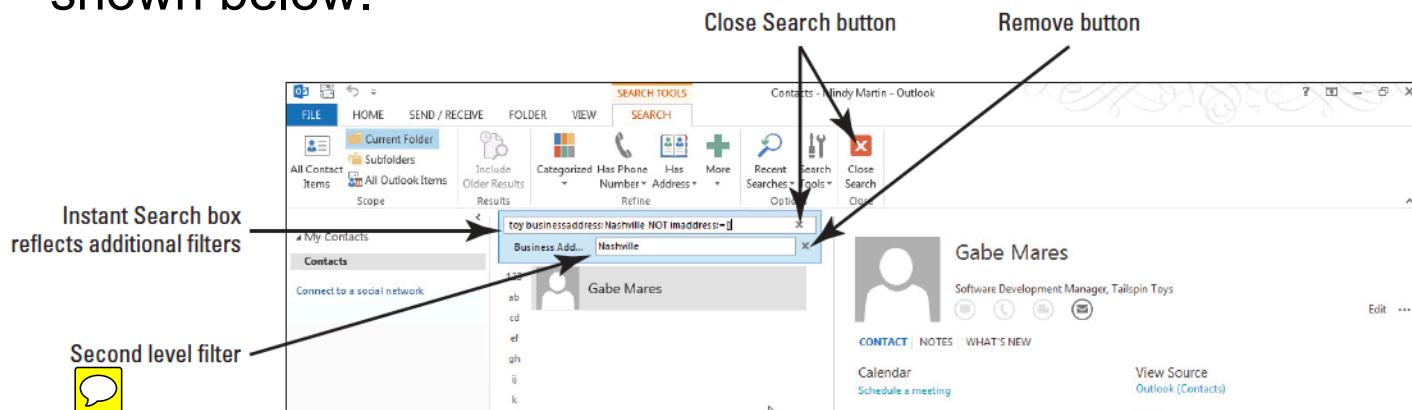
Step by Step: Search for Contacts

4. Click the **More** button in the Refine group of the SEARCH TOOLS tab. A menu of additional search fields is displayed, as shown below.
5. Select **Business Address** from the list.



Step by Step: Search for Contacts

6. In the **Business Address** field, key **Nashville**. Outlook refines the results list to show only the two contacts that both contain the word **toy** and are located in **Nashville**.
7. Click the **Has Address** button to open a list of additional filters. Click **Has IM Address**. Outlook refines the search results again to find the only one of the contacts that meets the previous search parameters and has an IM address listed, as shown below.



Step by Step: Search for Contacts

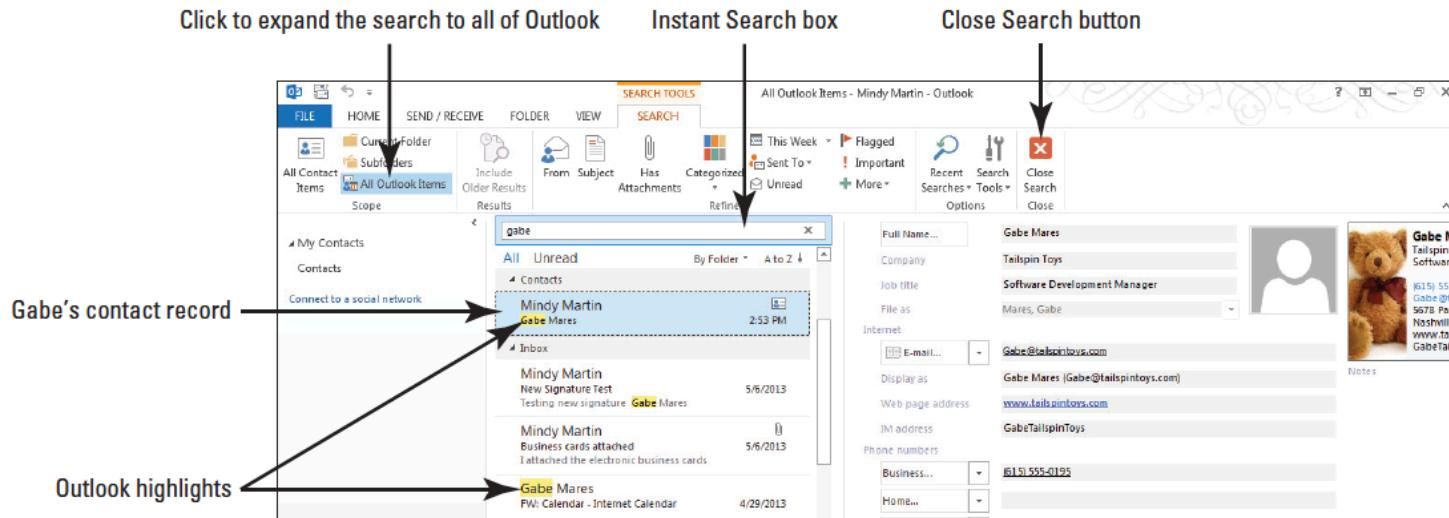
8. Click the **Remove** button next to the Business Address field. Click the **Close Search** button on the SEARCH TOOLS SEARCH tab.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.
 - Your Contacts window currently contains very few contacts.
 - As you add contacts, you can narrow the search results by using the filters on the SEARCH TOOLS tab.

Step by Step: Search for Items Related to a Contact

- **GET READY. LAUNCH** Outlook if it is not already running. The contacts used in this exercise were created in Lesson 6.
 1. If necessary, click the **People** button in the Navigation bar to display the People Hub.
 2. In the Instant Search box, key **gabe**. Gabe's contact record is displayed.
 3. Click the **All Outlook Items** button in the Scope group  of the SEARCH TOOLS tab. Outlook displays the matching Outlook items.

Step by Step: Search for Items Related to a Contact

4. The Gabe Mares contact record and the related messages are displayed. Notice that Outlook highlights the term Gabe wherever it appears in the results list, as shown below.
 5. Click the **Close Search** button to clear the search criterion.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.

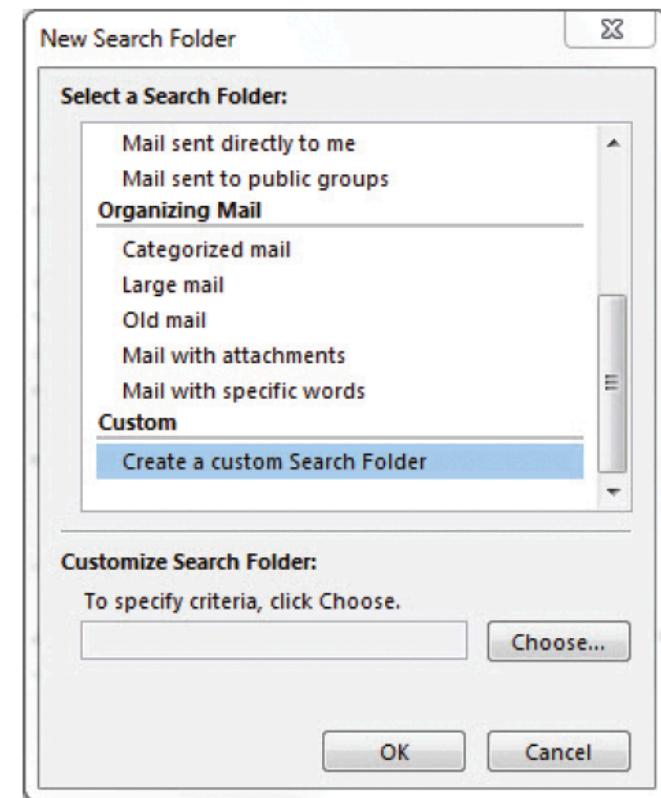


Step by Step: Create a Custom Search Folder

- **GET READY. LAUNCH** Outlook if it is not already running.
The contacts used in this exercise were created in Lesson 6.
 1. Click the **Mail** button in the Navigation bar to display the mailbox.
 2. On the FOLDER tab, click the **New Search Folder** button to display the New Search Folder dialog box.

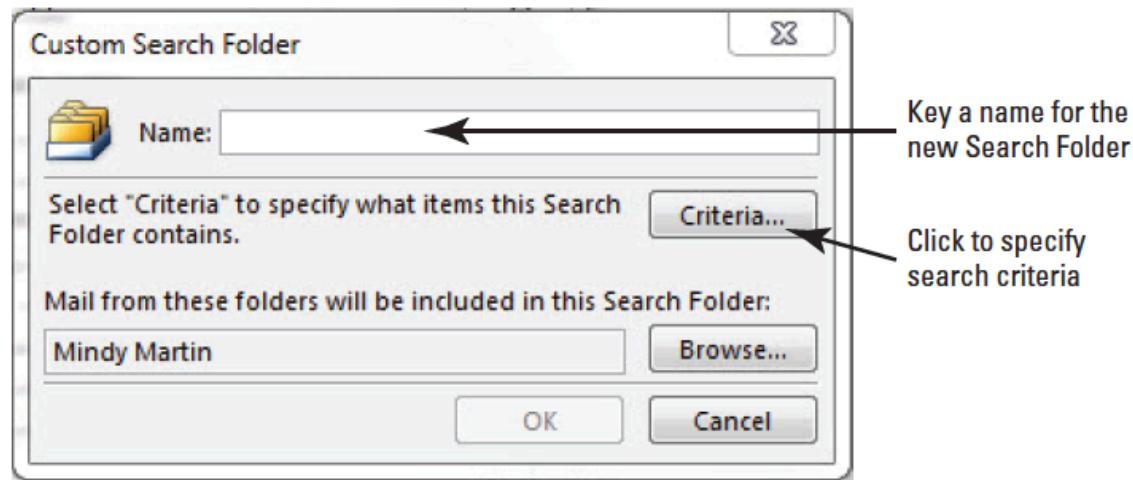
Step by Step: Create a Custom Search Folder

3. Scroll to the bottom of the *Select a Search Folder* list and click **Create a custom Search Folder**, as shown at right.



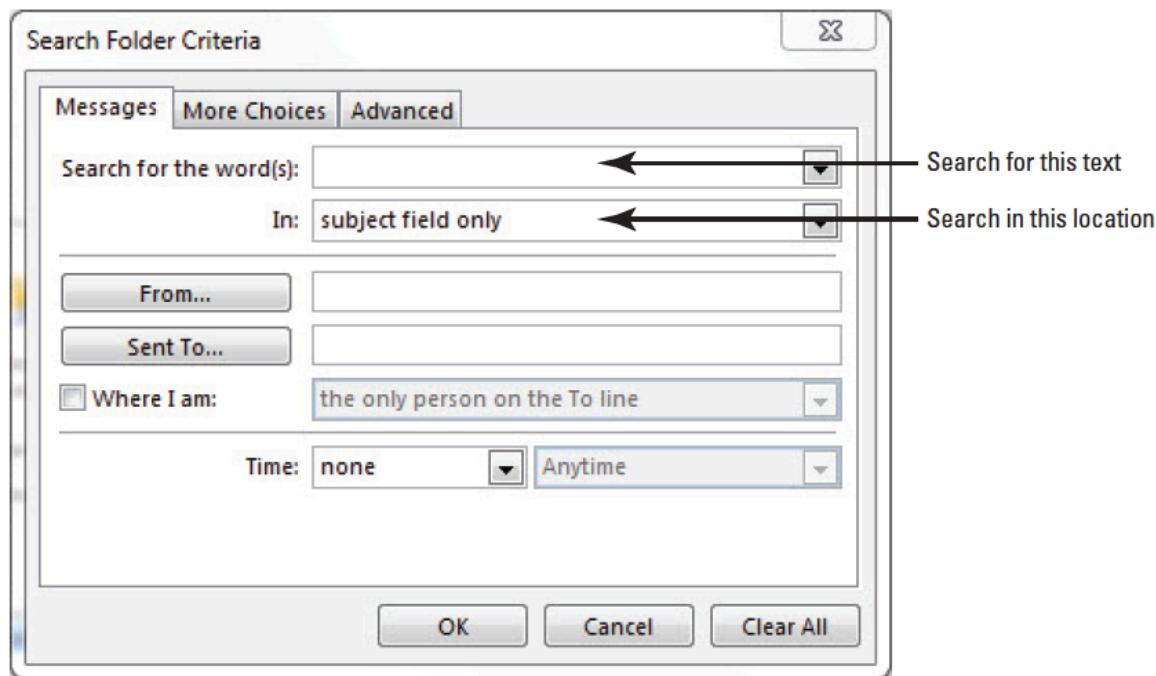
Step by Step: Create a Custom Search Folder

4. Click the **Choose** button to display the Custom Search Folder dialog box shown below.
5. In the **Name** field, key **Messages about Susan**. When naming a Search Folder, create a name that reflects the search criteria.



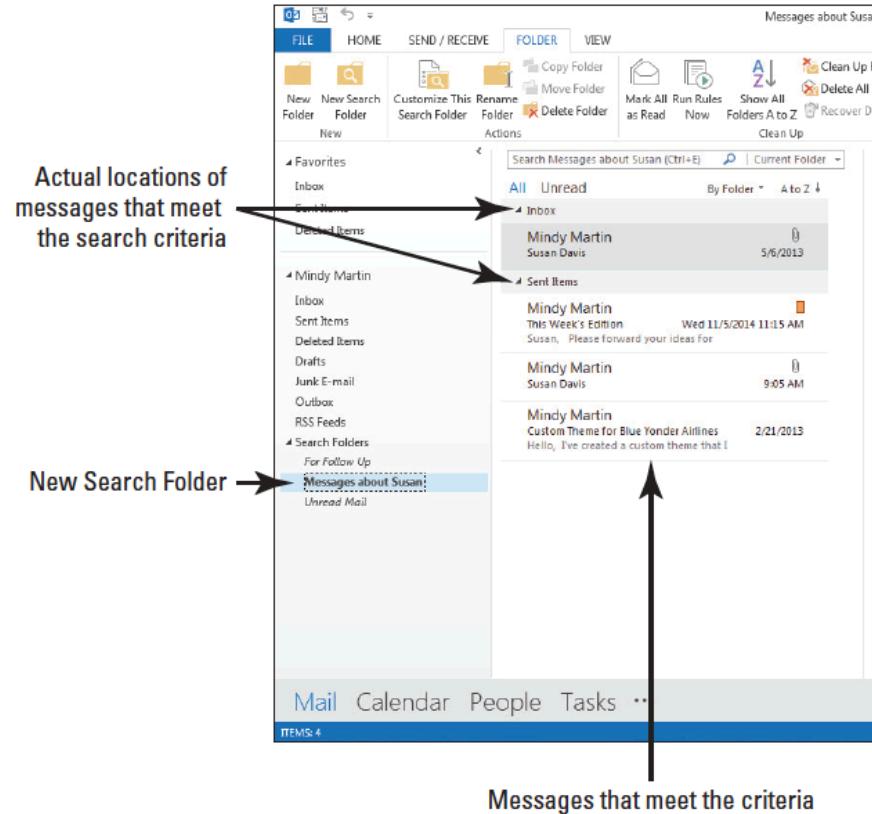
Step by Step: Create a Custom Search Folder

6. Click the **Criteria** button to display the Search Folder Criteria dialog box shown below.
7. In the *Search for the word(s)* field, key **Susan**.



Step by Step: Create a Custom Search Folder

8. In the **In** field, select **subject field and message body** from the dropdown list.
 9. Click **OK** in each dialog box to return to the Mail folder. The new Search Folder and the search results are automatically displayed, as shown at right.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.

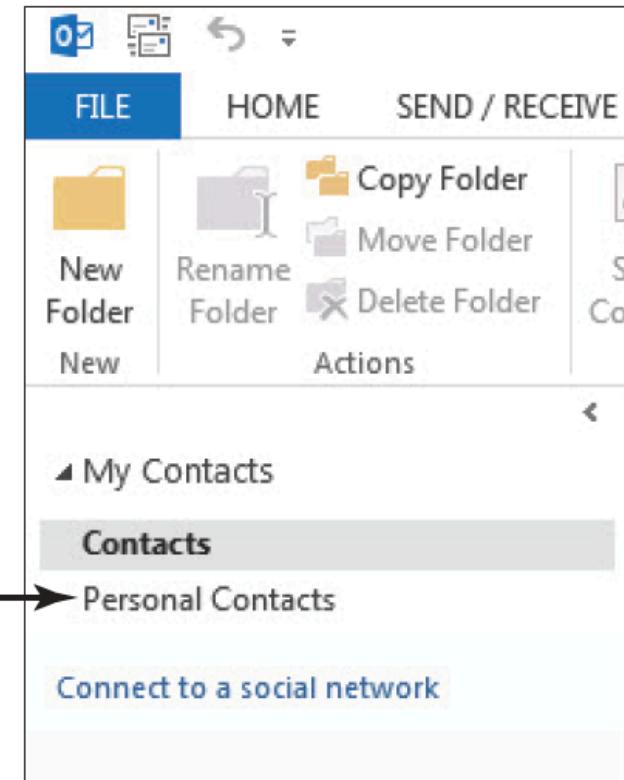


Step by Step: Create a Personal Address Book

- **GET READY. LAUNCH** Outlook if it is not already running.
 1. Click the **People** button in the Navigation bar to display the People Hub.
 2. On the FOLDERS tab, click **New Folder** in the New group. The Create New Folder dialog box is displayed.
 3. In the **Name** field, key **Personal Contacts**. Because you selected the **Contacts** folder before creating a new folder, Contact Items is already displayed in the *Folder contains* field and the Contacts folder is selected in the *Select where to place the folder* list.

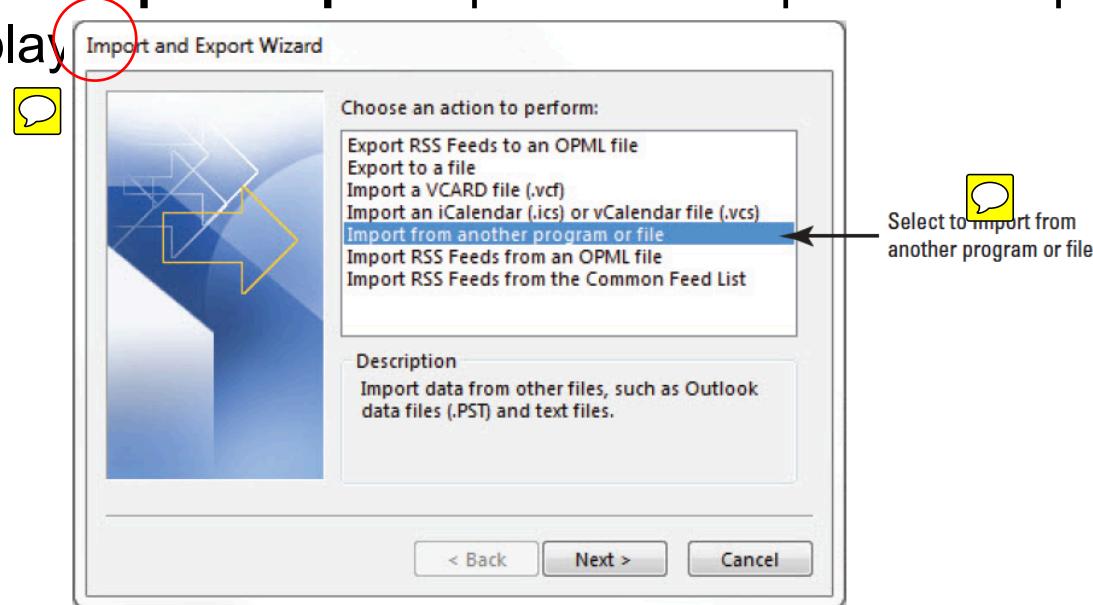
Step by Step: Create a Personal Address Book

4. Click **OK**. The Personal Contacts folder is created. The My Contacts heading now contains the following folders: *Contacts* and the new **Personal Contacts** folders, as shown at right.
 5. Click the **Personal Contacts** folder in the Folder List. The Personal Contacts window is blank because you don't have any contacts for this folder yet.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.



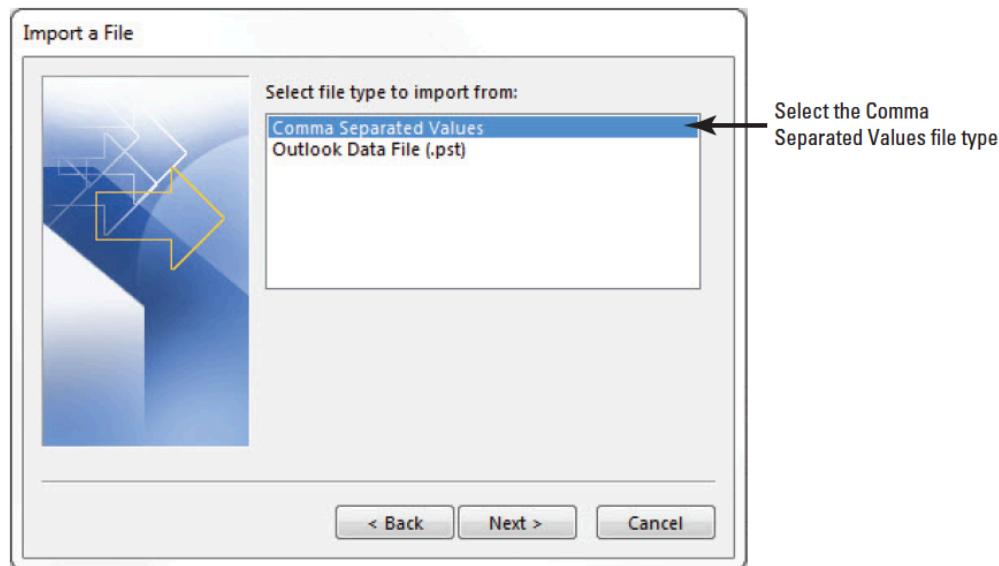
Step by Step: Import a Secondary Address Book from a File

- **USE** the Personal Contacts folder you created in the previous exercise.
 1. Click the **FILE** tab to open the Backstage view.
 2. Click **Open & Export** in the Navigation Pane.
 3. Click the **Import/Export** option. The Import and Export Wizard is displayed.



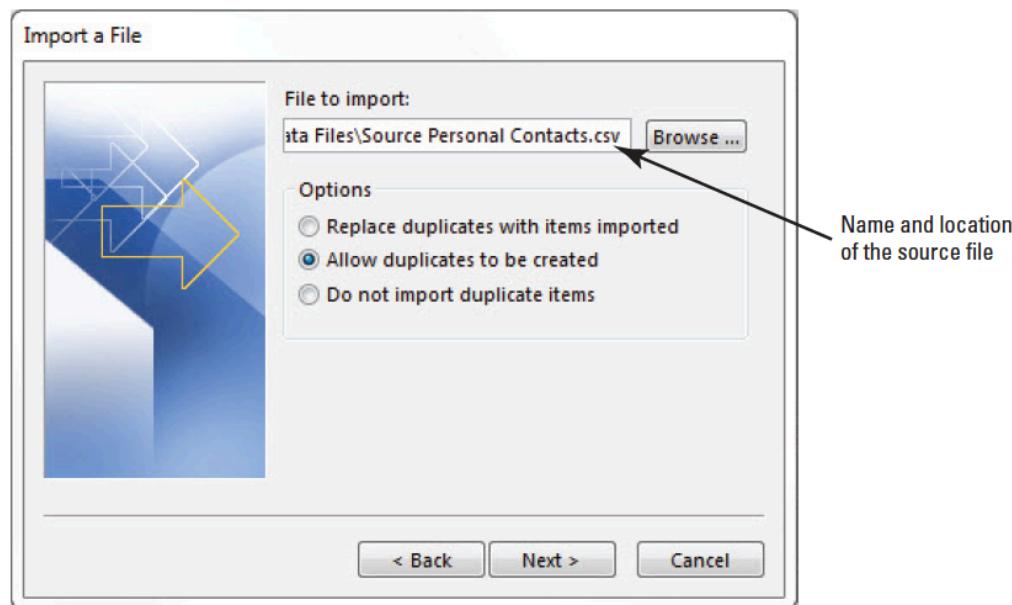
Step by Step: Import a Secondary Address Book from a File

4. Click **Import from another program or file**, if necessary, in the list of available actions.
5. Click the **Next** button.
6. In the *Select file type to import from* list box, click **Comma Separated Values** in the list of available import file types, as shown below; then click the **Next** button.



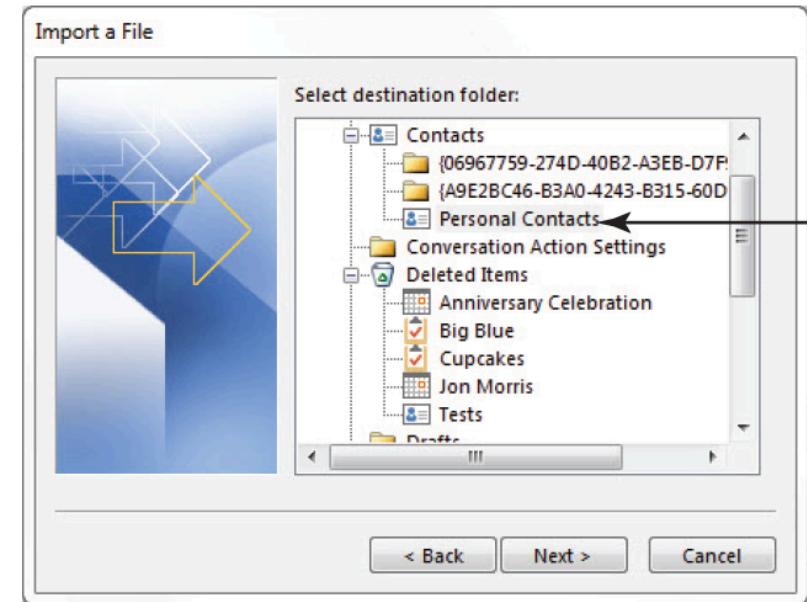
Step by Step: Import a Secondary Address Book from a File

7. Click the **Browse** button. The Browse dialog box is displayed.
8. Navigate to the data files for this lesson and click the **Source Personal Contacts** file.
9. Click **OK** to apply your choices and close the Browse dialog box to return to the Import a File dialog box, as shown below.



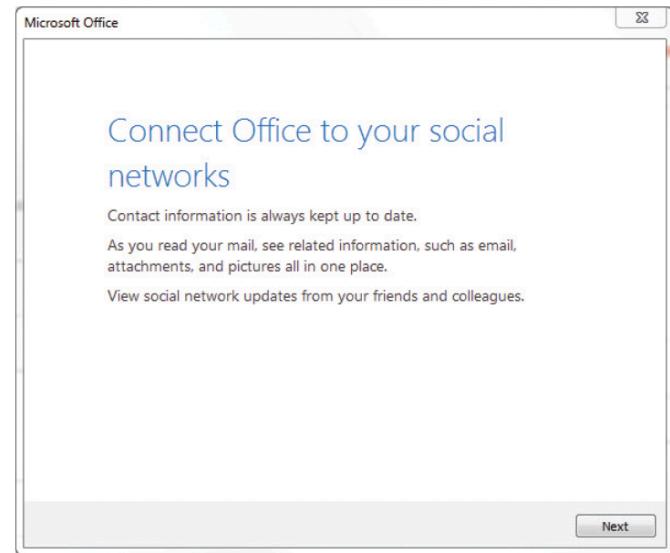
Step by Step: Import a Secondary Address Book from a File

10. Back at the Import a File dialog box, click the **Next** button. The *Select destination folder* list is displayed.
 11. Verify that **Personal Contacts** is selected as the destination folder, as shown at right.
 12. Click the **Next** button; then click the **Finish** button. The contacts are imported and displayed in the Personal Contacts folder.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.



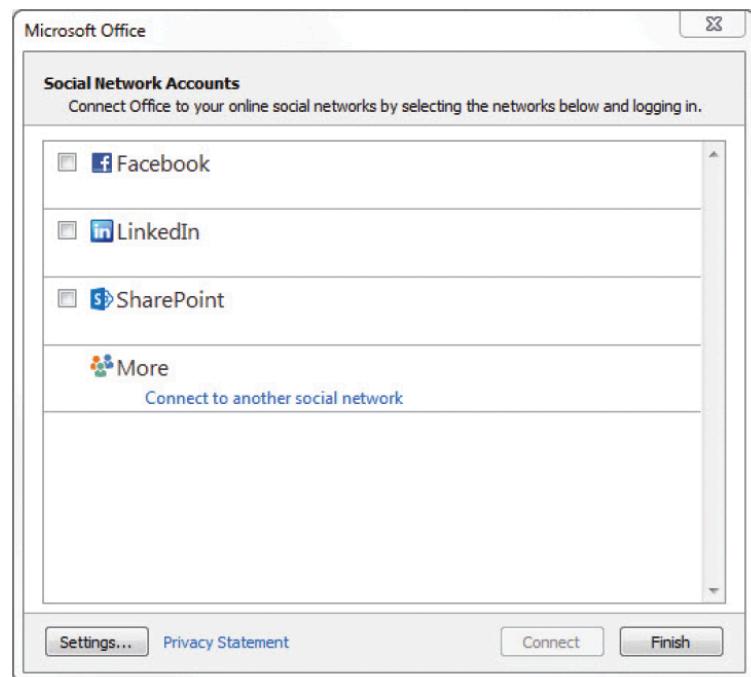
Step by Step: Use the Social Connector

- **USE** the Personal Contacts folder you created in the previous exercise.
 1. Click the **People** button in the Navigation bar to open the People Hub.
 2. Click **Connect to a social network** in the Folders Pane. The Social Connector Wizard is displayed, as shown at right.



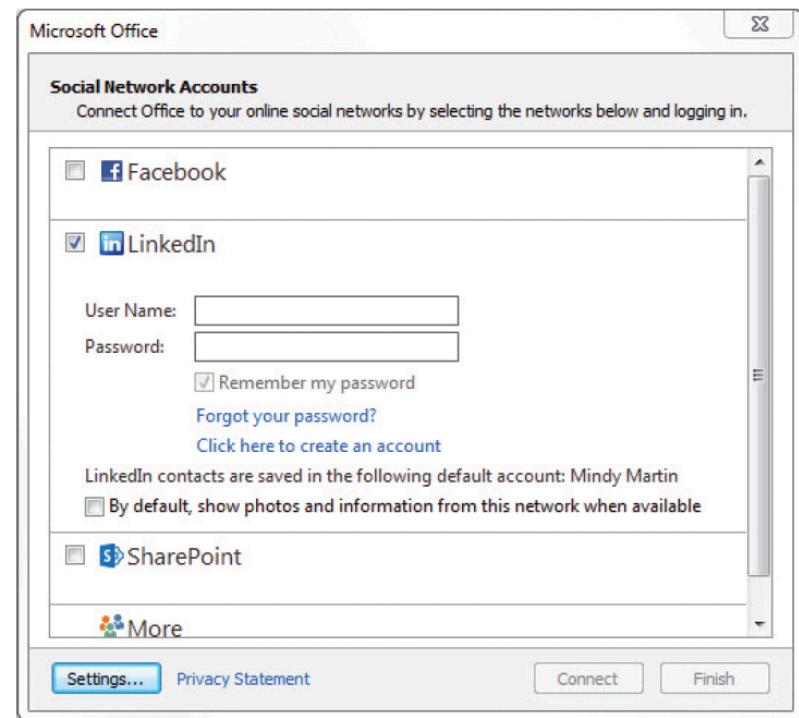
Step by Step: Use the Social Connector

3. Click the **Next** button. The Social Network Accounts page is displayed, as shown at right.



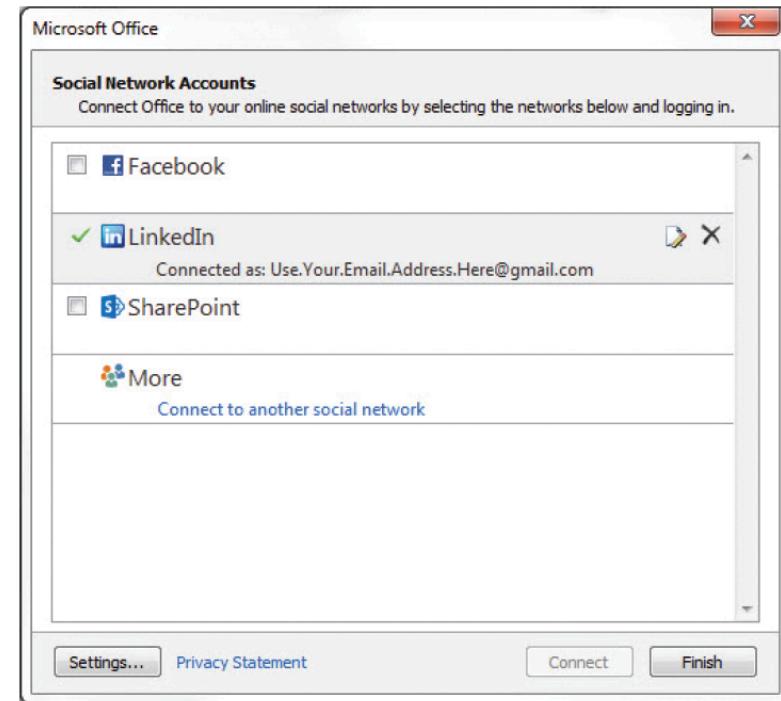
Step by Step: Use the Social Connector

4. Select a social network, as shown right.
5. Key in [your User Name and Password]. If you want it, select the **By default, show photos and information from this network when available** option.



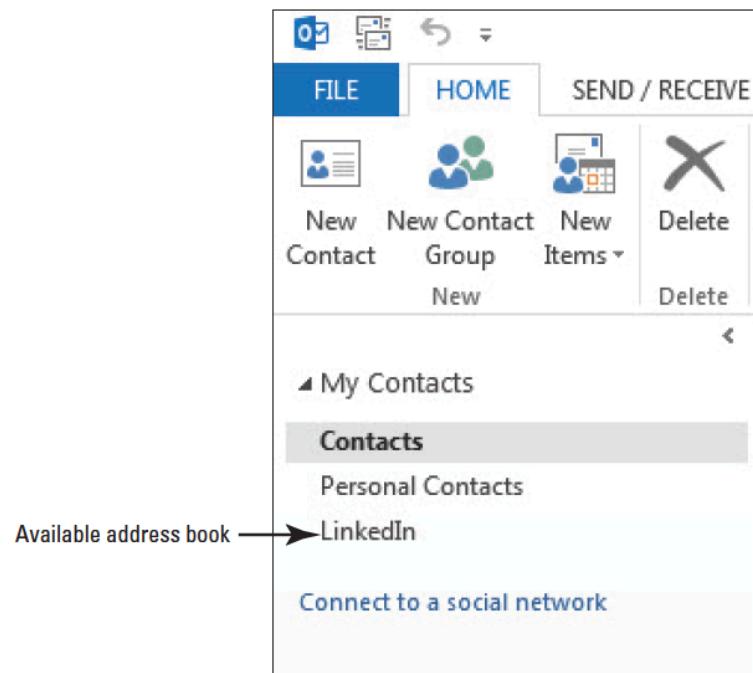
Step by Step: Use the Social Connector

6. Click **Connect**. After a moment, the Social Network accounts page is displayed again, indicating the newly connected account, as shown at right.
7. Click **Finish**. Outlook congratulates you on your new connection.



Step by Step: Use the Social Connector

8. Click **Close** to complete the process. A new contacts folder appears in your Folders Pane for your new network, as shown at right.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.



Step by Step: Link Related Contacts

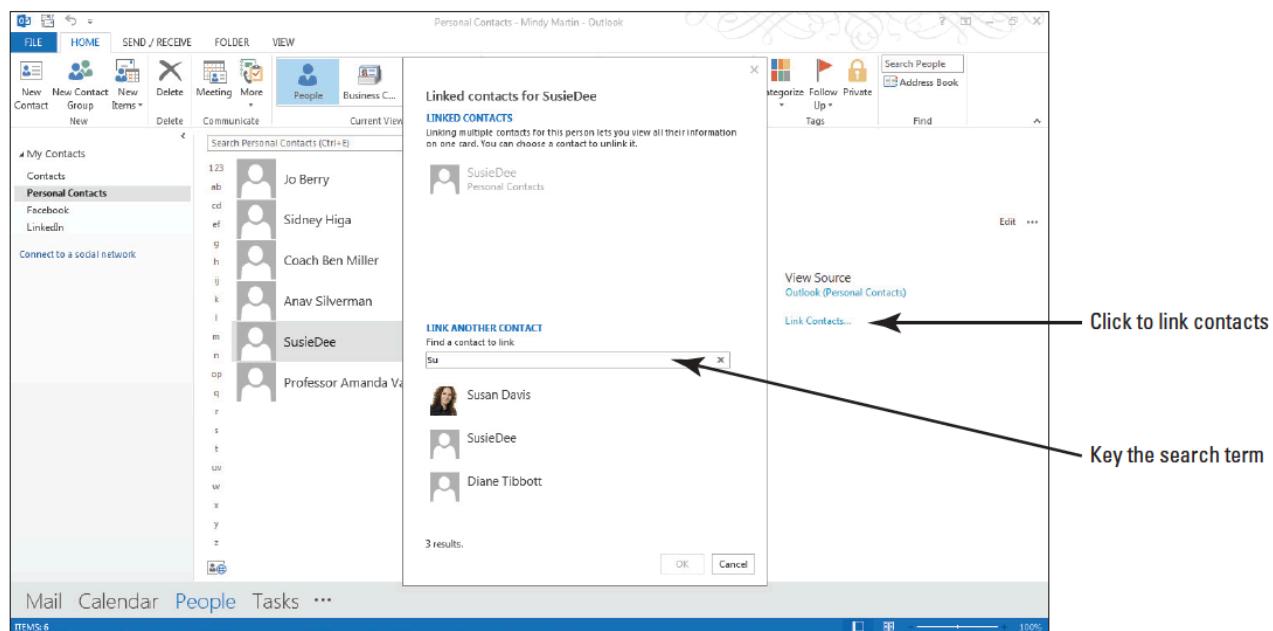
- **USE** the Personal Contacts folder you created in the previous exercise.
 1. If necessary, click the **People** button on the Navigation bar to open the People Hub.
 2. Click the **Personal Contacts** folder in the Folders Pane.
 3. Click **New Contact** in the New group to open an **Untitled** —Contact window.
 4. In the *Full Name* field, key **SusieDee**.

Step by Step: Link Related Contacts

5. In the Email field, key **SDavis@msn.com.**
6. Click **Save & Close**. A new SusieDee contact appears in the Personal Contacts folder, but this contact is the same as Susan Davis in your main contacts folder.
7. Click the **SusieDee** contact and then click the **Link Contacts** link under the **View Source** heading in the Contact Card. The Linked contacts for SusieDee window is displayed.

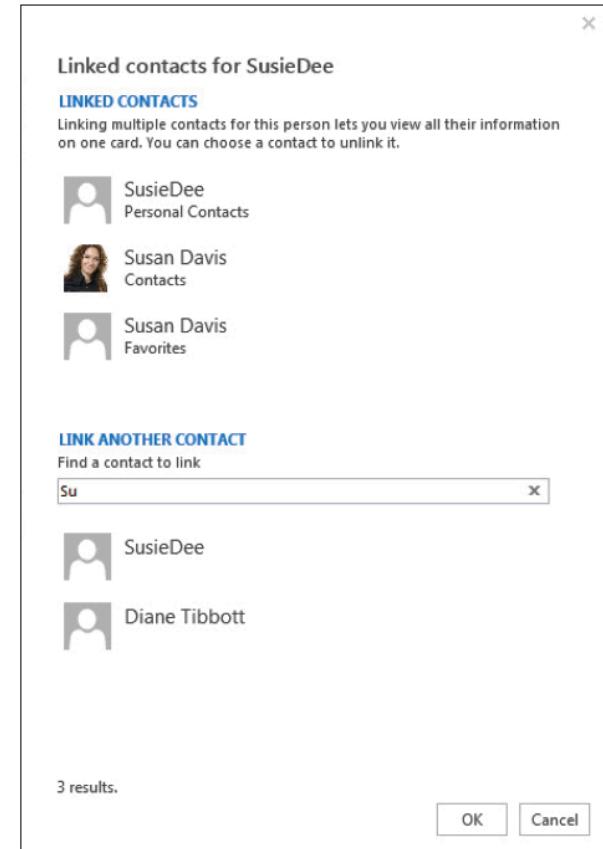
Step by Step: Link Related Contacts

8. Click the **Link Another Contact** box and key **Su**. As you begin to type, Outlook supplies matching contacts. Pretty soon, Susan Davis appears in the search results, as shown below.



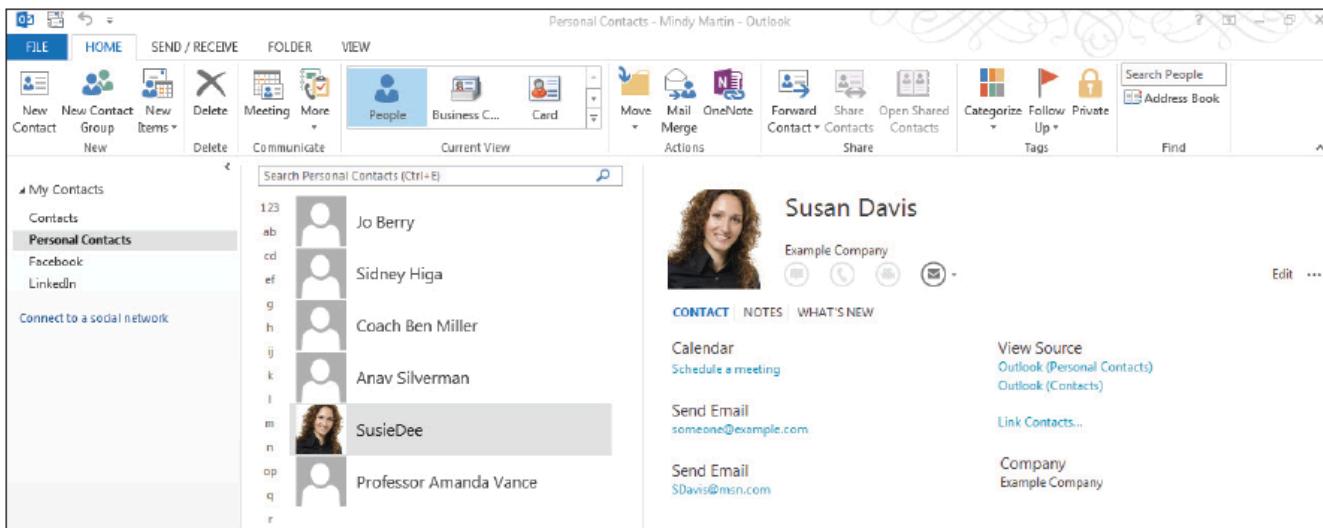
Step by Step: Link Related Contacts

- Click **Susan Davis** in the results list. The Susan Davis contact and Favorite move to the Linked contacts list, as shown at right.



Step by Step: Link Related Contacts

10. Click **OK**. The SusieDee contact record in the Personal Contacts folder is updated with Susan's image and contact information, as shown below.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.

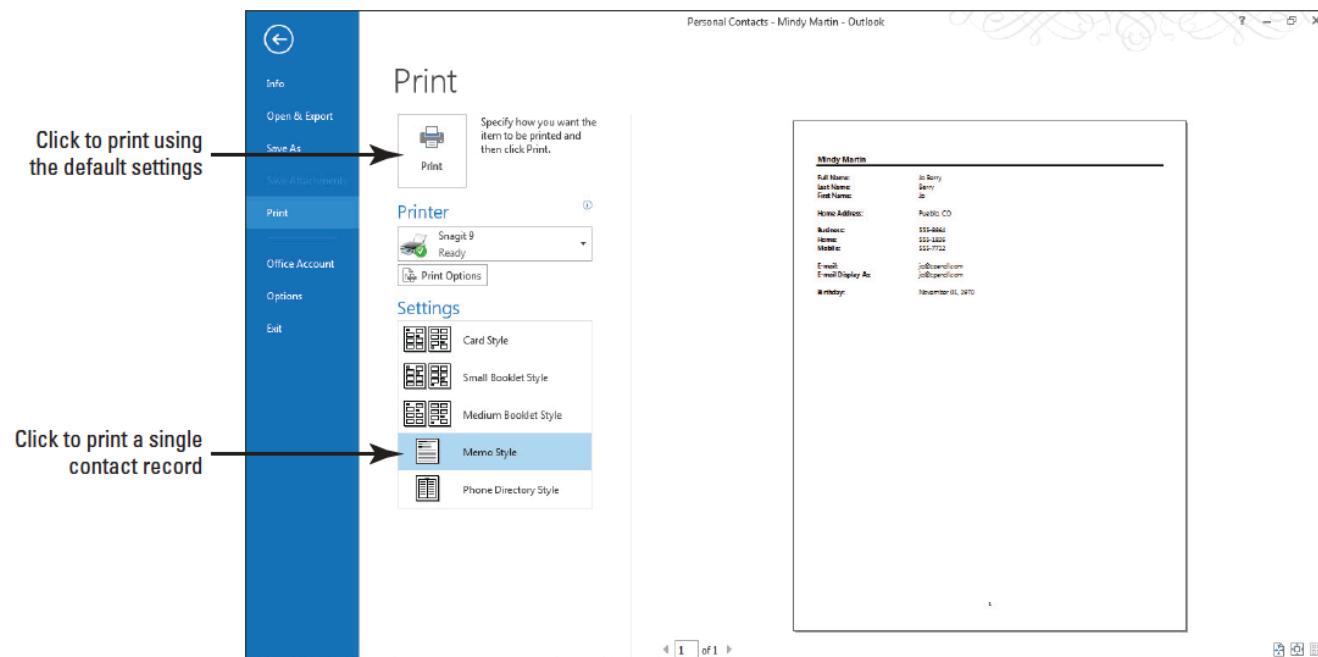


Step by Step: Print Contacts

- **GET READY. LAUNCH** Outlook if it is not already running.
 1. If necessary, click the **People** button in the Navigation bar to open the People Hub.
 2. Select the **Jo Berry** contact record in the Personal Contacts folder.
 3. Click **FILE** to open  Backstage view.
 4. Click **Print** in the Navigation Pane to open the Print page. Notice that by default the Card Style setting is selected, and the Preview pane displays all of the contacts in the Personal Contacts address book.

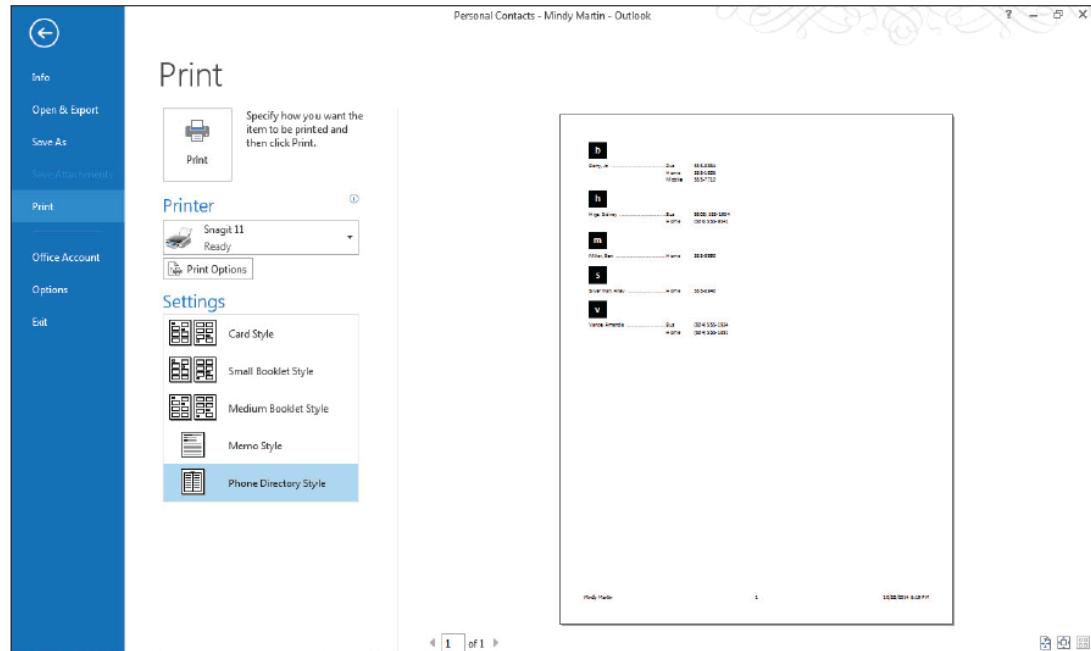
Step by Step: Print Contacts

5. Click **Memo Style**. Outlook displays the Jo Berry contact record in the Preview pane, as shown below.
6. Click **Print** if you want to print the single contact record using the default printer.



Step by Step: Print Contacts

7. Click **Phone Directory Style**. Outlook displays a preview of the entire phone directory for the Personal Contacts, as shown at right.



8. Click **Print** if you want to print a phone directory for all of the contacts in the selected folder using the default printer.
- **CLOSE** Outlook.

Skill Summary

Skills	Exam Objective	Objective Number
Using Electronic Business Cards	Edit contact information	4.1.4
	Share contacts	4.1.7
	Create new contacts	4.1.1
	Create and assign signatures	1.2.2
Finding Contact Information	Search for contacts	1.4.4
	Create new search folders	1.4.1
Managing Multiple Address Books	Manage multiple address books	4.1.8
	Import contacts from external sources	4.1.3
Printing Contacts	Print contacts	1.3.5