

Section 3



Topics Covered

- Creating a contact list..... 3-2
- Viewing contacts..... 3-10
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Time Required: 30 Mins



Creating a Contact List

You add contacts to Outlook by filling in a form with details about each contact, such as their name; address; company details; telephone and fax numbers, and e-mail address. A contact list has the advantage of being integrated with the other parts of Outlook and Microsoft Office allowing you, for example, to address a mail message, or to merge contact information into a Word form letter.

By adding your contacts to one or more *categories* you can easily keep track of related items without storing them all in the same folder. A category is a key word or phrase that describes the items you'll assign to it. For example, you may have a category called **Comsys Project** to which you add the contacts who are part of the project team. You can also add other items, such as mail messages and tasks to specific categories. A list of predefined categories is supplied with Outlook, however, you can add your own categories to this list.

To Create a Contact List

1. **Menu:** Select the **File, New, Contact** menu option.

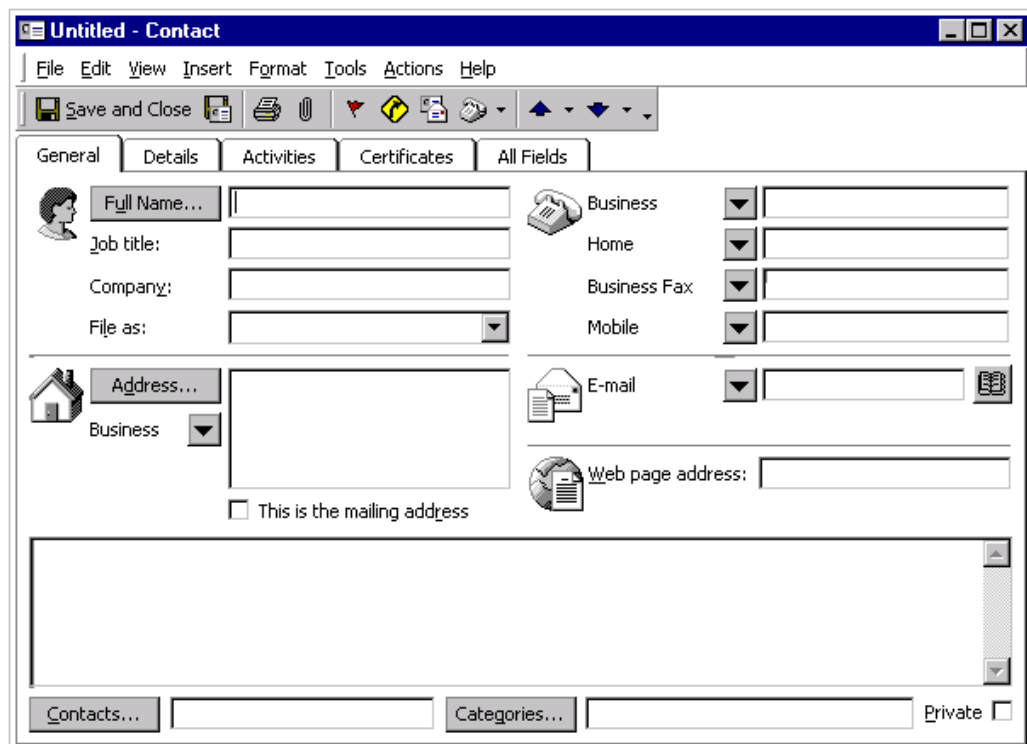


Click on the  **New Contact** button shown on the toolbar.

Note: If the current folder in the Outlook bar is not the **Contact** folder, this button will not be displayed on the toolbar. Instead, a button relating to the type of item that can be created in the current folder will be. In this case, click the drop-down arrow to the right of the **New...** button and choose **Contact**.



[CTRL] N when the **Contacts** folder is selected. /..





Creating a Contact List

../ To Create a Contact List

2. Complete the **General** property sheet, typing the information you want to store for the contact. Where more than 1 entry can be stored, a drop-down arrow appears to the left of the field. For example, you can record up to 3 addresses for each contact: **Business**, **Home** and **Other**.

Address...
Business
Business
Home
Other
 This is the mailing address

Enter an address by choosing the address type from the drop-down list for **Address** then typing the relevant details.

3. To add further details, click the **Details** tab and enter the information.

Details

Department: Manager's name:
Office: Assistant's name:
Profession:


Nickname: Birthday:
Spouse's name: Anniversary:

Online NetMeeting settings

Directory server:
E-mail alias:

Internet Free-Busy

Address:

4. Click the **Save and Close** button or, if you want to add another contact, click the  **Save and New** button. Alternatively, to create a new contact from the same company, choose the **Contact, New Contact from Same Company** menu option.

The information from the **Contacts** folder can be displayed in a number of ways in the Information viewer. Initially the default view is address cards. An example is shown below:

Ferry, June
199 Old Wharf Road
Draftsburch
Middleshire
Business: 01521 42152
Business Fax: 01521 42153
E-mail: jferry@acme.co.uk



Exercise 3-1

In this exercise, you'll add two new contacts to your contacts list.

1. Follow the instructions below to add the first new contact.

- Display the contents of your **Contacts** folder in the Information viewer then choose the **File, New, Contact** command.

A blank **Contact** form is displayed.

The screenshot shows the 'Untitled - Contact' window in Outlook. The 'General' tab is selected, displaying various fields for entering contact information. The 'Full Name' field is empty, and the 'Business' dropdown menu is set to 'Business'. The 'Address' field is also empty, and the 'Business' dropdown menu is set to 'Business'. The 'E-mail' field is empty, and the 'Web page address' field is empty. The 'Categories...' field is empty, and the 'Private' checkbox is unchecked.

- Type **Mr Jack Cunningham** into the **Full Name** text box.
- To see how Outlook has split this name, click the **Full Name** button.

The 'Check Full Name' dialog box is shown. It contains the following information:

Name details	
Title:	Mr
First:	Jack
Middle:	
Last:	Cunningham
Suffix:	

Buttons: OK, Cancel

Show this again when name is incomplete or unclear



Exercise 3-1

- Add a **Middle name** of **Kevin** then click **OK** to close the dialogue box and return to the **Contact** window.

Notice that Jack's middle name has been added to the **Full Name** text box:

General	
Full Name...	Mr Jack Kevin Cunningham

- Enter the following information for Jack by typing it into the appropriate text boxes:
Job Title: Assistant Buyer
Company: Pollock Clothing Co.
- To file Jack under his company name, click on the **File As** drop-down arrow and choose the following option:

General	Details	Journal	Certificates	All Files
Full Name...	Mr Jack Kevin Cunningham			
Job title:	Assistant Buyer			
Company:	Pollock Clothing Co.			
File as:	Cunningham, Jack Kevin			
Address...	Cunningham, Jack Kevin			
Business	Mr Jack Kevin Cunningham			
	Pollock Clothing Co.			
	Cunningham, Jack Kevin (Pollock C			
	Pollock Clothing Co. (Cunningham)			
<input type="checkbox"/> This is the mailing address				

- Type the following **Business** address into the **Address** text box, using the **[ENTER]** key to move to a new line when necessary:

90 Pollock Place
Draftsburgh
Middleshire

- Ensure that the **This is the mailing address** check box is activated then click in the **Business** box in the **Phone** group of text boxes.



Exercise 3-1

As you move from the **Address** text box, you'll be asked to confirm that the way Outlook has split the address is correct:

Check Address

Address details

Street: 90 Pollock Place

City: Draftsburgh

State/Province: Middleshire

ZIP/Postal code:

Country: United Kingdom

Show this again when address is incomplete or unclear

OK
Cancel

- Click **OK**.
- Enter a **Business** phone number of **01521 42215**.
- Click the **Save and Close** button.

Outlook will ask you to confirm the phone details:

Check Phone Number

Phone details

Business: +44 (01521) 42215

Country/Region: United Kingdom

City/Area code: 01521

Local number: 42215

Show this again when phone number is incomplete or unclear

OK
Cancel

- Check the phone number you've entered then click **OK** to confirm it.

The new contact's address card is displayed:

Pollock Clothing Co.
Cunningham, Jack Kevin


90 Pollock Place
Draftsburgh
Middleshire

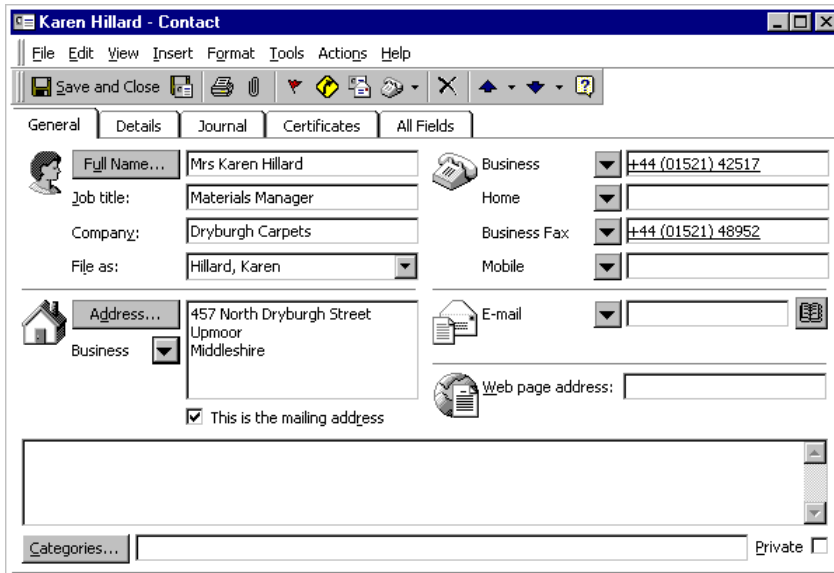
Business: +44 (01521) 42215



Exercise 3-1

2. Follow the instructions below to add another new contact.

- Click the  **New Contact** button then complete the **Contact** window as shown below.



- From the **Address** drop-down list, choose **Other** then add the following address:

Unit 15
Draftsburgh Industrial Estate
Draftsburgh
Middleshire

- Press **[TAB]** to move from the **Address** text box and click **OK** to confirm the address details.
- Click in the **E-mail** text box and type **khillar@dryburgh.co.uk** then press **[TAB]**.
As this address is in a recognised format, Outlook underlines it.



Exercise 3-1

- Click the **Categories** button.

The **Categories** dialogue box is displayed.

Categories ? X

Item(s) belong to these categories:

Add to List

Available categories:

- Business
- Competition
- Favorites
- Gifts
- Goals/Objectives
- Holiday
- Holiday Cards
- Hot Contacts
- Ideas
- International
- Key Customer
- Miscellaneous
- Personal
- Phone Calls

OK Cancel Master Category List...

- Activate the **Suppliers** check box, using the scroll bar to bring it into view in the list box.
- Click **OK** to return to the **Contact** window.
- Click the **Details** tab then complete this sheet as shown below.

Details

Department: Materials Manager's name: Alistair Franklin

Office: Assistant's name: Jim Green

Profession:

Nickname: Birthday: Sun 07/06/98

Spouse's name: Anniversary: None

Online NetMeeting settings

Directory server:

E-mail alias: Call Now

Use the date navigator to choose this date, or simply type it.



Exercise 3-1

- Save and close this contact.

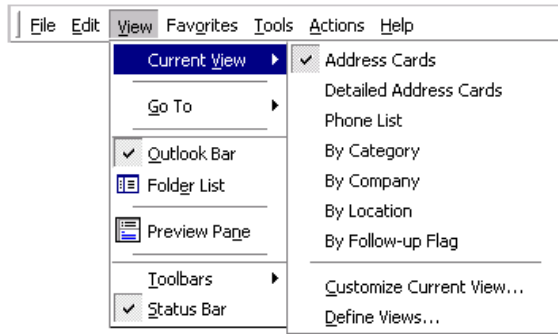
Karen's address card is shown below.





Viewing Contacts

Although your contacts are shown as address cards by default, you can change your view of this information. There are a number of views to choose from, and you'll find these on the **View** menu:



Detailed Address Cards have the same format as address cards but show more information:



Note: The precise amount of information that's shown will vary from contact to contact depending on which fields were recorded for the contact.

The **Phone List** option lists your contacts in a table format:

Contacts				
Full Name	Company	File As	Business	
Click here to add a new Co...				
Mr Jack Kevin Cunningham	Pollock Clothing Co.	Pollock Clothing Co., Cunningham, Jack Kevin	01521 42	
Mrs Karen Hillard	Dryburgh Carpets	Hillard, Karen	01521 42	
Ms June Ferry PhD	ACME Wall Builders Ltd	Ferry, June	01521 42	

Other available views can be used to group together contacts with the same **Company**, **Location** or flag status (none, flagged or complete).

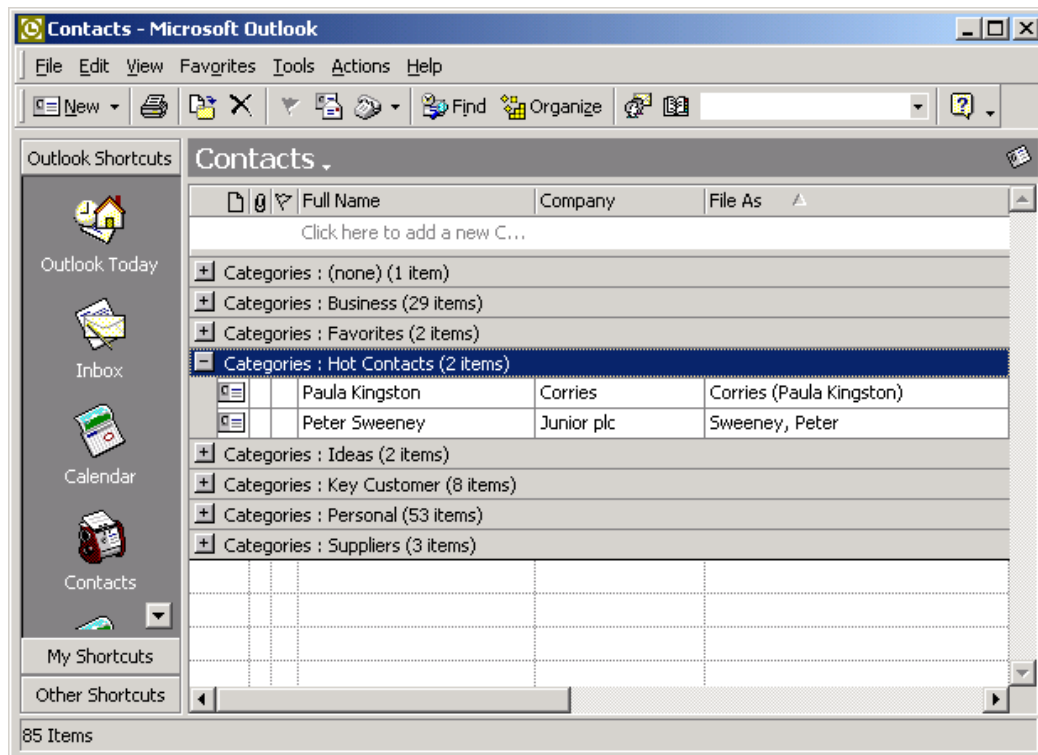


Viewing Contacts

Organising Contacts by Category

The **View, Current View, By Category** menu option allows you to group your contacts under headings representing the categories you assigned them to. Each contact will appear once in each category to which it has been assigned.

The illustration below shows an example of this view:



Each heading can be double clicked to hide or show the contacts in that category. Alternatively, you can click the + button to display the contacts in that category, or the - button to hide them. In the illustration above, the **Hot Contacts** category are display while contacts in all other categories are hidden.

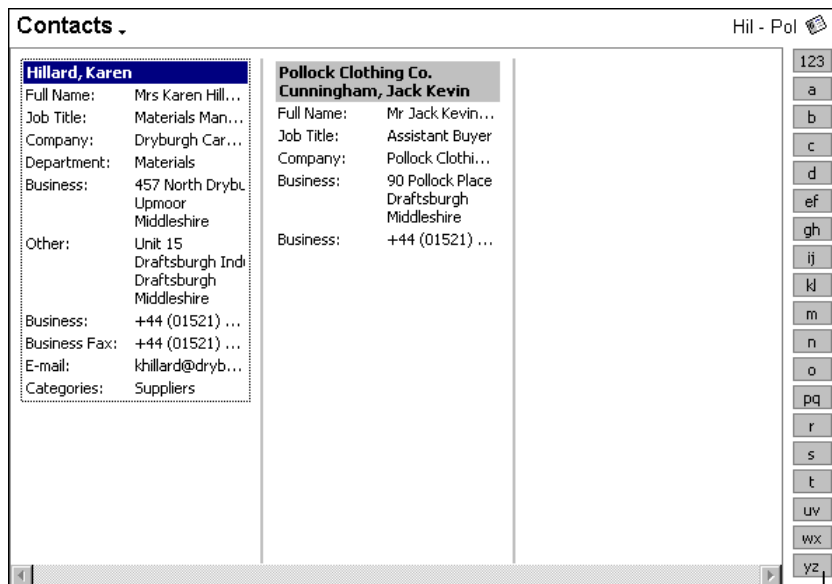


Editing Contacts

If you need to change, add or remove information for a contact, you can do so in a variety of ways.

The quickest way is to change the information in the Information viewer. If you can see the contact, simply click in the field to be modified and make the required changes. If the contact isn't shown in the Information viewer, use the scroll bars to bring it into view before editing as described above.

Note: If you're using one of the address card views and you have a large contacts list, you can use the buttons shown down the right side of the Information viewer to move through your list:



Use these buttons to navigate your contact list.

If the field you want to add, change or remove isn't shown in the Information viewer, you can double click on a contact to display their **Contact** window where you can make the required changes then save them.

Tip: If you find that you can't make changes in the Information viewer, it may be that *in-cell editing* has been switched off. Select the **View, Current View, Customise Current View** command the click the **Other Settings** button and activate the **Allow In-cell Editing** check box. Click **OK** twice to return to the Information viewer where you should now be able to make the changes you require.



Adding Other Information

If you want to record information such as birthdays, anniversaries, or family details about a contact, you can do so using the **All Fields** property sheet in the **Contact** window. This sheet contains a drop-down list that allows you to display the fields you require. If you want to see all the fields available for a contact, choose **All Contact fields** from this list:

All Fields

Select from: **All Contact fields**

Name	Value
Account	
Address Selected	457 North Dryburgh Street, Upmoor, Middleshire
Address Selector	Business
Anniversary	None
Assistant's Name	Jim Green
Assistant's Phone	
Attachment	Yes
Billing Information	
Birthday	07 June 1998
Business Address	457 North Dryburgh Street, Upmoor, Middleshire
Business Address City	Upmoor
Business Address Country	United Kingdom
Business Address PO Box	

New... Properties Delete

You can then complete the fields you require.

Note: When you add a date such as a birthday or an anniversary, it is added to your calendar as an *event*. The calendar and events are discussed later in this workbook.



Deleting Contacts

To delete contacts from your **Contacts** folder, highlight those to be deleted and then press **[DELETE]** on your keyboard or right click a highlighted contact and choose **Delete** from the shortcut menu.

The deleted entries will not be permanently deleted at this stage; they are placed in the **Deleted Items** folder and can be retrieved from there until the **Deleted Items** folder is emptied. To retrieve a contact, drag it from the **Deleted Items** folder to the **Contacts** folder.



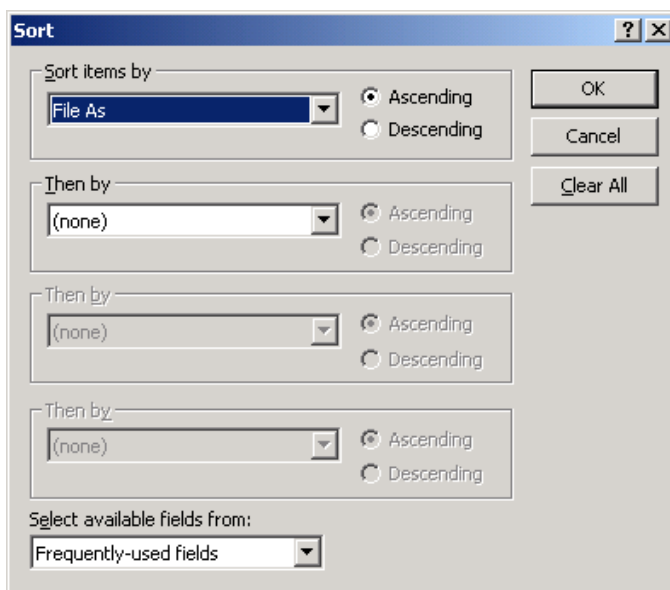
Sorting Contacts

When contacts are displayed in one of the table layouts, for example, **Phone List** or **By Category**, you can sort them in ascending order of any of the columns by clicking the column heading. To sort them in descending order of a column, click the column heading again.

When viewing your contacts using one of the other views, for example, **Address Cards** or **Detailed Address Cards**, you must use the **View, Current View, Customise Current View** menu option. You can also use this option to sort any view in order of more than one column.

To Sort Contacts By Customizing the View

1. In the **Contacts** folder display the view you want to sort.
2. Select the **View, Current View, Customize Current View** menu option.
The **View Summary** dialogue box will be displayed.
3. Click **Sort**.



4. Select the field(s) you want to use to sort the contacts from the drop-down lists.
For example, if you want to sort your contacts so that they are shown in order of company and then, if more than one contact comes from the same company, in order of last name, select **Company** from the first drop-down list and **Last Name** from the second.
5. Select the **ascending** or **Descending** option button for each sort field you have chosen.
6. Click **OK**.

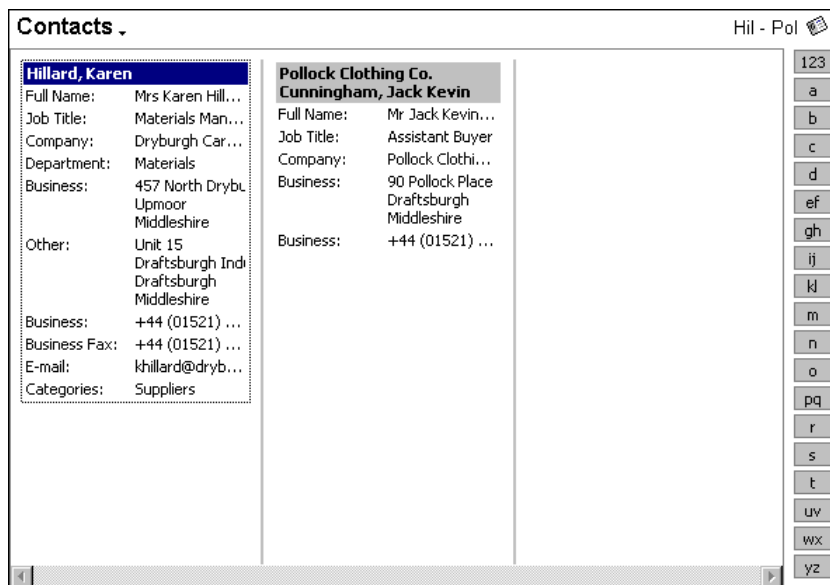
Your contacts will be shown in this order until you change the sort order or select another view.



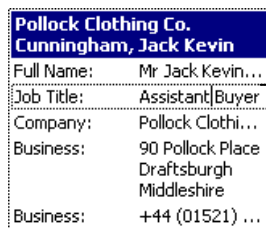
Exercise 3-2

1. Select the **View, Current View, Detailed Address Cards** command.

Your contacts are now shown with more information. As your contact list may contain contacts other than those created during the previous exercise, the information shown in the illustration below may differ from that shown in your Information viewer.



2. Jack Cunningham has now been promoted to the position of **Buyer** so his job title has to be changed. Click in the **Job Title** field and delete the word **Assistant**.



Click here and make the required changes.

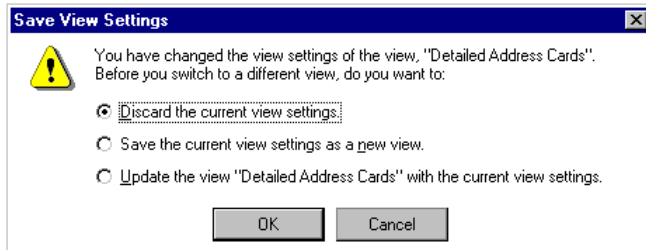
If you can't change this field, choose the **View, Current View, Customise Current View** command and click the **Other Settings** button. Activate the **Allow In-cell Editing** check box then return to the Information viewer and make the required changes.



Exercise 3-2

3. Select the **View, Current View, Phone List** command.

You may receive the following prompt.



If you do, ensure that the **Discard...** radio button is selected then click **OK**.

Your contacts are now listed in a table format:

Full Name	Company	File As	Business Phone	Busi
Click here to add a new C...				
Welcome to Contacts!				
Mrs Karen Hillard	Dryburgh Carpets	Hillard, Karen	01521 42517	015:
Mr Jack Kevin Cunningham	Pollock Clothing Co.	Pollock Clothing Co., Cunningham...	01521 42215	

Again, remember that your list may include other contacts.

4. Next choose the **View, Current View, By Company** command.

Any contacts from the same company are grouped together and shown with bar showing the name of the company and how many contacts are in the group.

Full Name	Job Title	Company	File As
Click here to add a new C...			
Company : Dryburgh Carpets (1 item)			
Mrs Karen Hillard	Materials Ma...	Dryburgh Carpets	Hillard, Karen
Company : Pollock Clothing Co. (1 item)			
Mr Jack Kevin Cunningham	Buyer	Pollock Clothing Co.	Pollock Clothing Co., Cunningham...



Exercise 3-2

5. If you are working with others, add a new entry in the contact list for one of your colleagues.

If you are working alone, enter and save your own details.

6. Follow the instructions below to add some personal information for Karen Hillard.
 - Ensure that the Address Cards view is shown then double click on **Karen Hillard's** entry in the contact list to open the **Contact** form.
 - Click the **All Fields** tab then choose **All Contact fields** from the **Select from** drop-down list.

Name	Value
Account	
Address Selected	457 North Dryburgh Street, Upmoor, Middleshire
Address Selector	Business
Anniversary	None
Assistant's Name	Jim Green
Assistant's Phone	
Attachment	Yes
Billing Information	
Birthday	07 June 1998
Business Address	457 North Dryburgh Street, Upmoor, Middleshire
Business Address City	Upmoor
Business Address Country	United Kingdom
Business Address PO Box	

Buttons: New..., Properties, Delete

- Review the information shown here. This is the information you entered when you created Karen's entry.
 - Using the scroll bar, bring the **Car Phone** field into view then enter the number **0411 521646**.
 - Save and close Karen's entry.

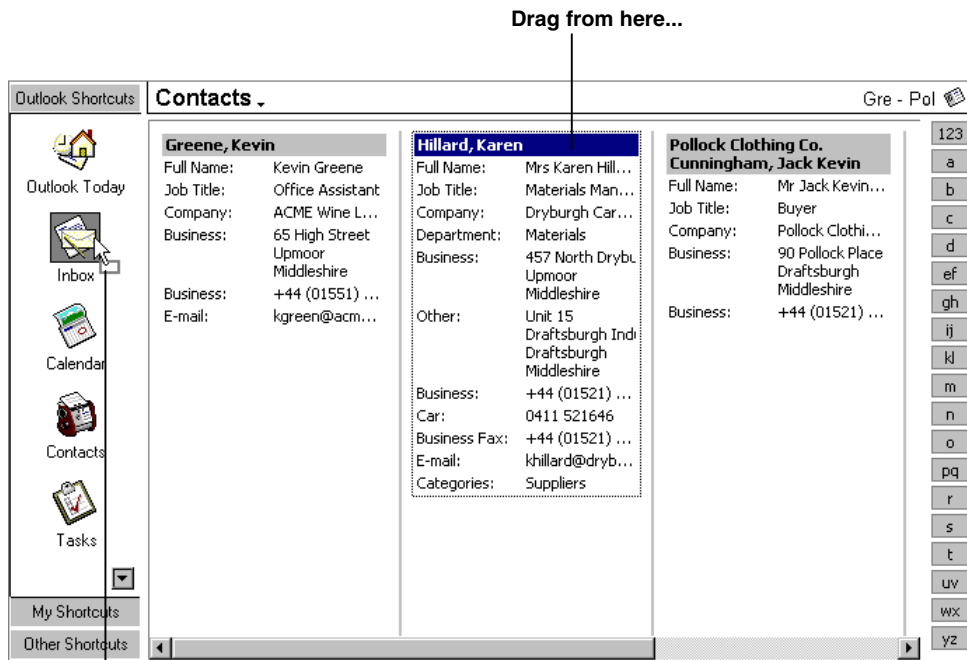
You can now see the Car phone field that you've just added in the Address Cards view.
7. Add a contact entry for one of your friends.
 8. Right click the contact you just added and choose **Delete** from the shortcut menu.

This contact is not permanently removed from the system: it has been placed in the **Deleted Items** folder and can be retrieved until the **Deleted Items** folder is emptied.
 9. Select the **View, Current View, By Category** menu option to group the contacts under headings representing the categories you've used.
 10. Use the + and – buttons on the heading bars to hide and display the contacts in each category.



Communicating with Your Contacts


If contacts in your contact list have e-mail addresses, you can either use the address books as described in section 2 when composing a message, or you can initiate a mail message from the **Contacts** folder. To do this, you can simply drag a contact onto the **Inbox** folder icon in the Outlook bar...



...and drop here.

...to display a blank message addressed to that contact:

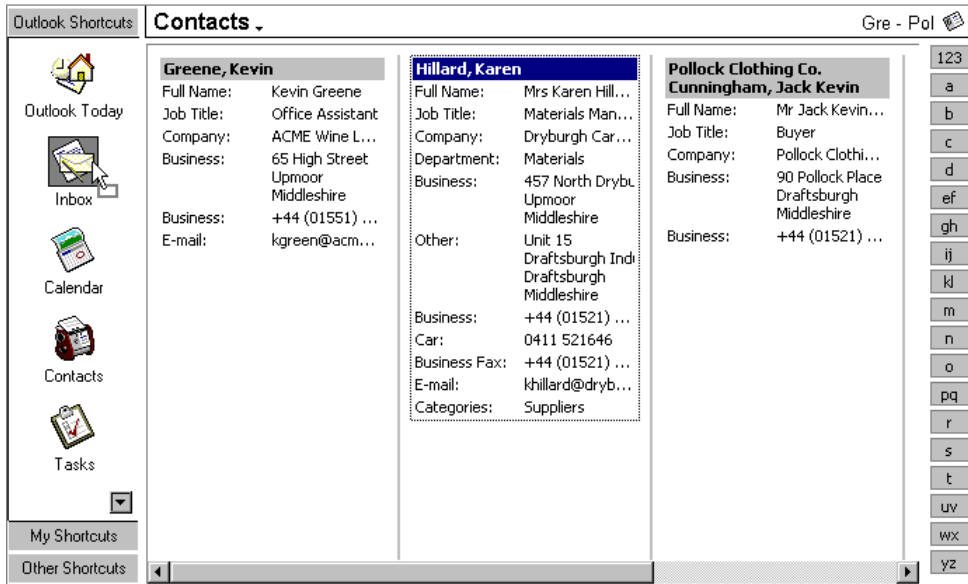
To...	<input type="text" value="khillard@dryburgh.co.uk"/>	— Contact's e-mail address
Cc...	<input type="text"/>	
Subject:	<input type="text"/>	

Alternatively, select the contact in the contact list then click the  **New Message to Contact** button shown on the toolbar.



Exercise 3-3

1. Ensure that you can see the **Contacts** folder in the Outlook bar.
2. If necessary, use the scroll bar or buttons to bring the contact you added at step **5** in exercise 3-2 into view.
3. Click on the contact in the Information viewer then drag it onto the **Inbox** icon and release the mouse button.



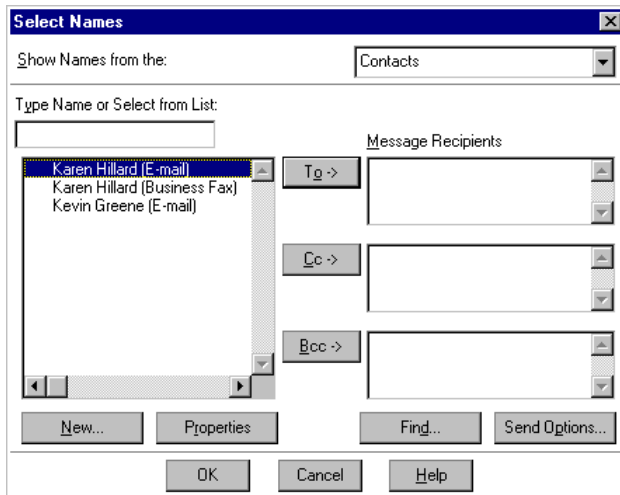
When you release the mouse button, a message addressed to the selected contact is displayed.

4. Complete this message then send it.
5. Select the **File, New, Mail Message** command to create another new message.



Exercise 3-3

- Click the **To** button to display your address book.
- From the **Show Names from the** drop-down list, select **Contacts**, shown under **Outlook Address Book**.



- Add the same contact as last time to the **Message Recipients** list then click **OK** to return to the message then complete and send the message.



Sending Contact Information via E-mail

When you want to share a contact with another user, you can send the contact's details via e-mail.

To Send Contact Information via E-mail

1. Select the contacts whose information you want to send.

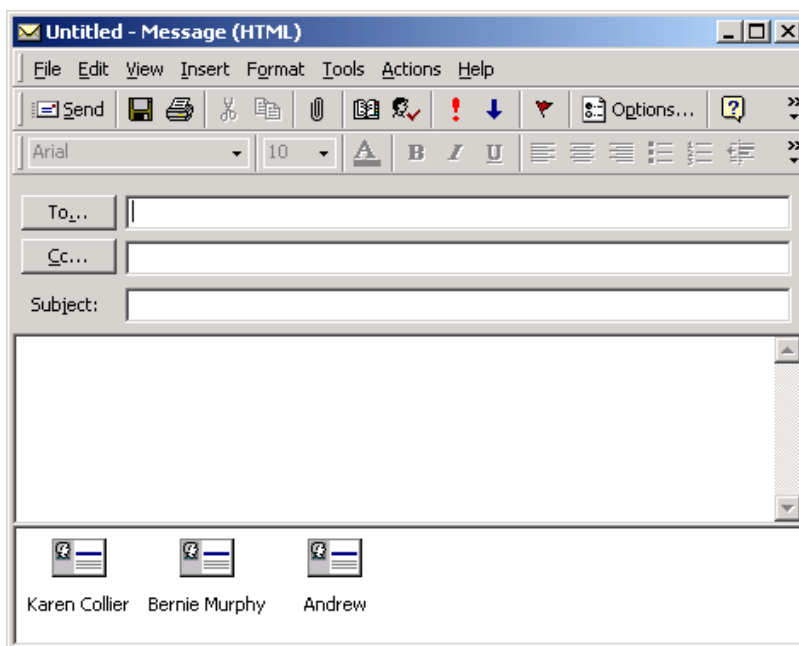
To select contacts that appear together in the current view, click the first and then, holding down **[SHIFT]** click the last.

To select contacts that do not appear together in the current view, click the first and then, holding down **[CTRL]**, click on each of the others.

2. Select the **Actions, Forward** menu option. Alternatively, right click a selected contact and choose **Forward** from the shortcut menu.

Note: This option will read **Forward Items** if more than one contact is selected.

A new message is created with each of the selected contacts shown as an attachment.



3. Complete the message and then send it.

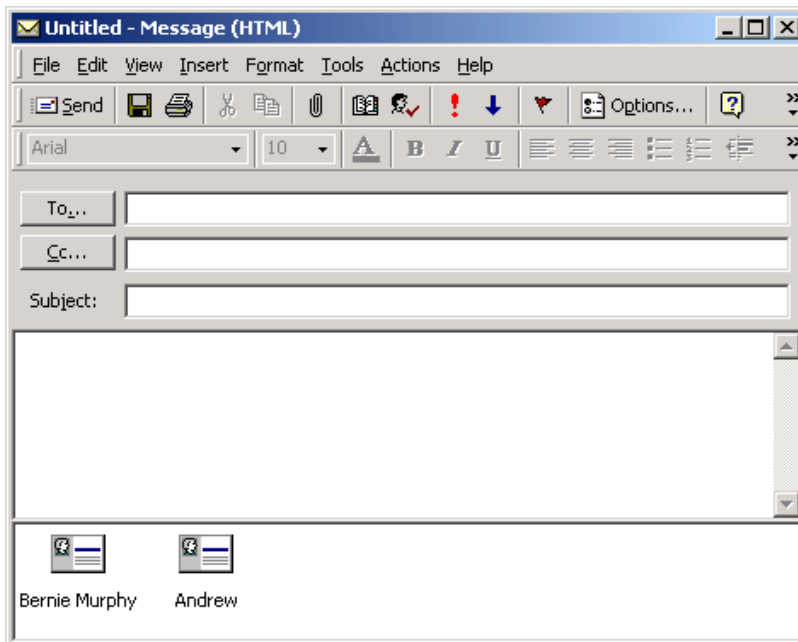


Exercise 3-4

In this exercise you'll send information about 2 of your contacts to another e-mail user.

1. Add contact information for 2 of your friends.
2. Click the first of the contacts you added and then, holding down [CTRL] on your keyboard, click the second.
3. Right click one of the selected contacts and choose **Forward Items** from the shortcut menu.

A message containing the contacts as attachments is displayed. Remember that, as you added your own friends as contacts, the names next to the attachments will differ from those shown below.



4. If you are working by yourself, add your e-mail address to the **To** box. If you are working in a group, address the message to one of the other users.



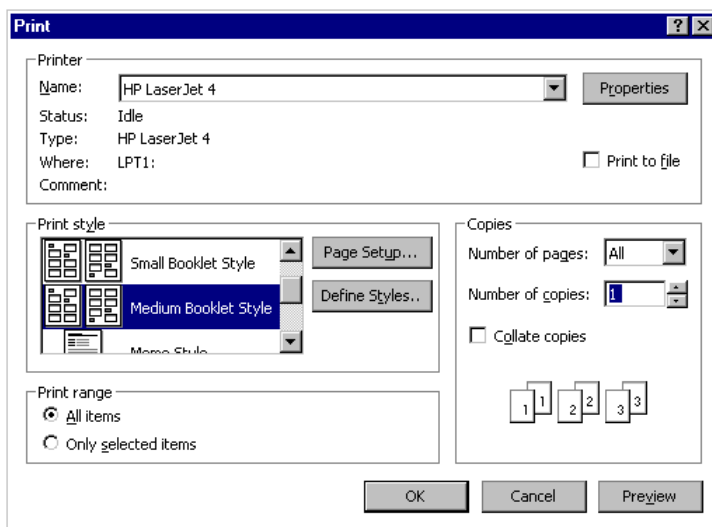
Printing Contact Information

If you want a paper copy of some or all of your contacts, you can choose from a variety of formats. For example, you can print your contacts in the style of a telephone directory or as they appear in the Address Cards view.

To Print Contact Information

1. If you want to print only some of your contacts, select them in the Information viewer.
2. Select the **File, Print** command or press **[CTRL] P**.

The **Print** dialogue box will be displayed.



3. Complete this dialogue box:

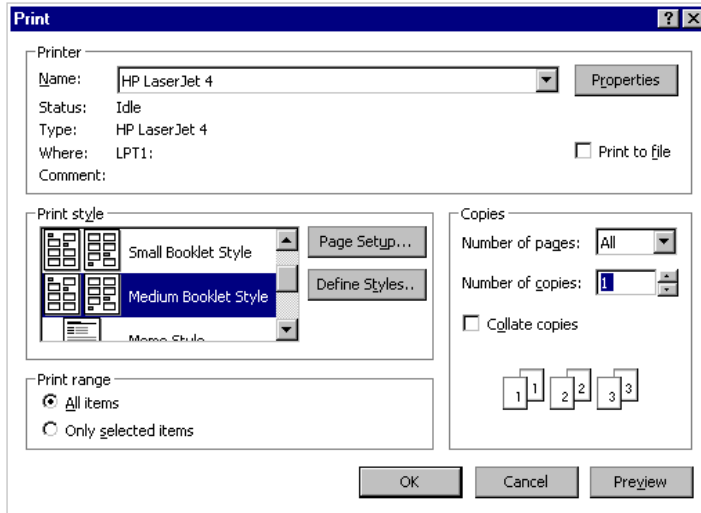
- **Printer:** If necessary, choose the required printer from the **Name** drop-down list.
- **Print style:** Choose a style for the printed information from the **Print style** list box.
- **Copies**
 - Number of pages:** Select **Odd**, **Even** or **All** from this drop-down list.
 - Number of copies:** Enter the number of copies of each contact to be printed.
 - Collate:** When printing more than one copy, activate this check box to print of the first copy of the selected items before printing the second and so on.
- **Print range:** Choose to print **All items** or **Only selected items**.

4. Click **OK** to print your contact list.



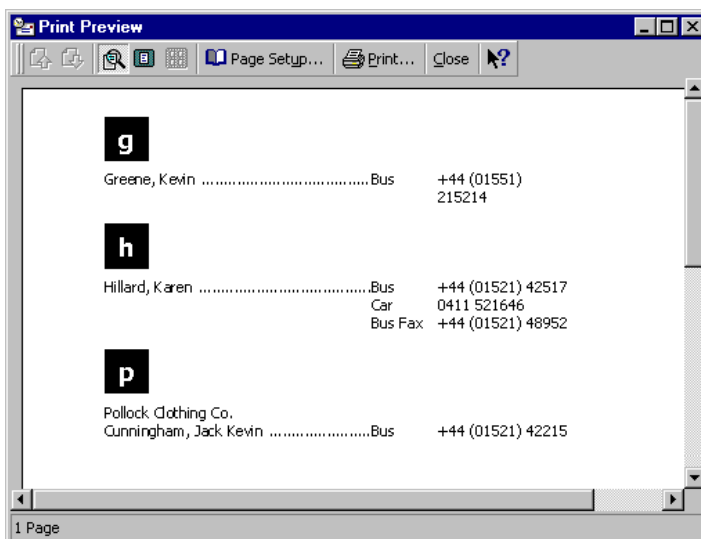
Exercise 3-5

1. Select the **File, Print** command.



2. Select the **Phone Directory Style** from the **Print style** list then click the **Preview** button.

If you are asked about double-sided printing, choose **Yes** to see a preview of your contact list. Remember that if you have additional contacts, your preview will include these contacts too.



3. Click the **Close** button in the Preview window.
4. Using the **File, Print** command, preview the **Small Booklet Style**.
5. In the Preview window, click the **Print** button to return to the **Print** dialogue box.
6. Click **OK** to produce a paper copy of your contact list in the selected style.



Questions and Answers

1. Which menu command would you use to create a new contact?

2. When creating a contact, which check box would you activate to hide the contact details from other users who have access to your **Contacts** folder?

3. Which menu shows you the available views for your contact list?

4. Which of the available views displays your contacts in a table format?

5. Describe how you would add fields that aren't shown in the current view.

6. What would happen if you dragged a contact from your Information viewer and dropped it on the **Inbox** folder in the Outlook bar?

7. How many different formats are there for printing your contacts list?

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