Microsoft Outlook 2010 – Level 1

9 – Contacts

CORPORATE LEARNING & DEVELOPMENT

CONTACTS

The **Contacts** folder in Outlook lets you keep track of people with whom you interact or communicate.

It is really just a database into which you enter details such as name, address, company, phone number, position, and the like. Once the details have been entered, they can be used to create phone lists, send messages and faxes, and for a range of other tasks.

In this booklet you will:

✓ gain an overview of the contacts form
✓ gain an overview of electronic business cards
✓ learn how to access and view contacts
✓ learn how to create a new contact
✓ learn how to enter details into a new contact form
✓ learn how to edit the details of a contact
✓ learn how to insert a picture into the details of a contact
✓ learn how to add a contact for an existing company
✓ learn how to change the layout and design of individual electronic business cards
✓ learn how to delete an unwanted contact
✓ learn how to recover a deleted contact
✓ learn how to print contact details

UNDERSTANDING THE CONTACT FORM

Contacts in Outlook is simply an electronic address or business card book. Just like the traditional paper-based books, Contacts lets you record contact details such as name, telephone numbers, email address, and much more. You can add a new contact by typing the information directly into a new contact form as shown below.

The Contact Form

The contact form captures the details for a contact. The window comprises five pages which are displayed by clicking on the five tools in the **Show** group on the ribbon. Each page of the form is used for quite specific functions as detailed below.

General This area is used to record more common, general details such as name and address information. You can even insert a picture of the contact here and write comments in the large white box.

Details This area is used for more specific information such as birthday, name of spouse, specialised contact information, and more. This is used for details that would probably not be necessary for day-to-day contact.

Activities This area keeps track of encounters with the contact. Here you can see email interactions, journal entries, and upcoming tasks and appointments that have been made with the contact.

Certificates This is a highly specialised area where you can nominate digital signatures to use so that you can communicate with the contact using encrypted messaging. It sounds a bit cloak and daggerish, but it is really just set up so that you can send secure messages to the contact. Given the process of obtaining digital signatures, you'll not need to use this area much unless you are dealing with extremely sensitive information.

All Fields Displays all of the possible fields available on the contact form and the current value of these fields. You'll rarely need to use this area.

UNDERSTANDING ELECTRONIC BUSINESS CARDS

When you create a new contact, you enter the details into a new contact form. The default view for displaying contacts is the **Electronic Business Cards** – each of your contacts appears as an electronic business card. Any data that you add to a contact is automatically made to the corresponding Electronic Business Card, and vice versa if you edit an Electronic Business Card.
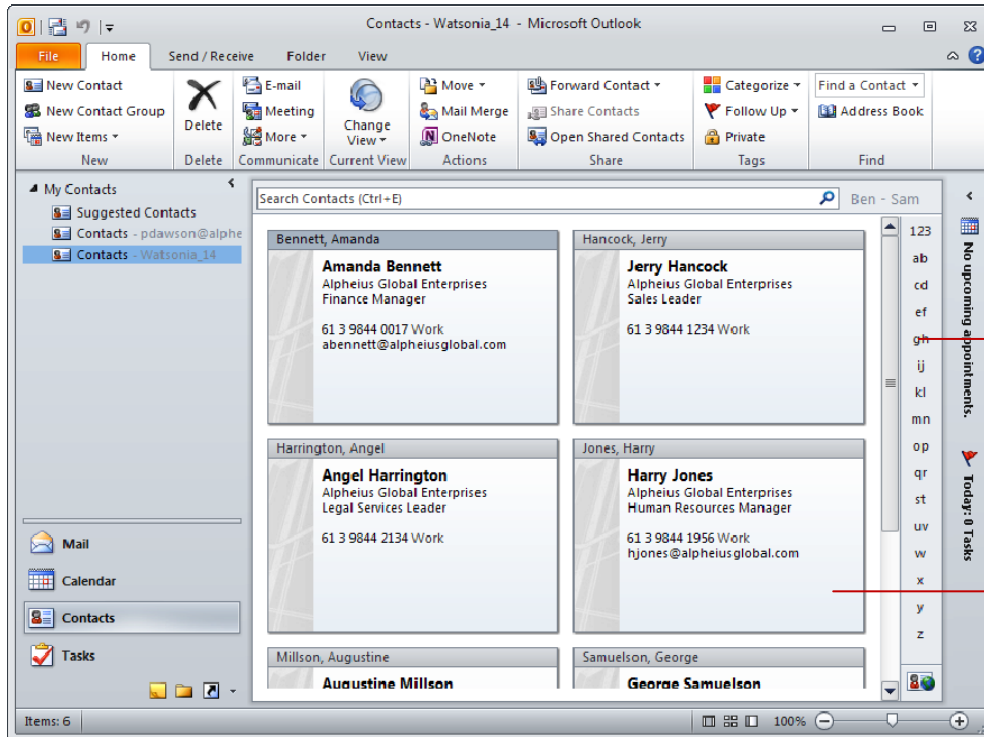
Alphabetical listing

Each contact has a corresponding Electronic Business Card

What's On A Business Card

The **Electronic Business Cards** feature streamlines the tasks of creating and sharing contacts. The **Business Cards** view shows your contacts with company logos and designs, individualised backgrounds and layouts, as well as photos or other images. These design features help to make your contacts readily recognisable when you need to locate them. The size of your Outlook window determines how many cards you can view at a time.

By positioning the fields manually when you edit a card, you can choose what information is visible on the card in the **Business Cards** view. You can modify the information for contacts you create and the cards that you receive from other people.

Advantages Of Using Electronic Business Cards

- Shared information fields make creating and saving new contacts quick and with fewer errors. Although the **Contact form** contains all of the information about a contact, the **Electronic Business Card** displays only the contact information specific to a particular audience or purpose.

- The **Business Cards** view adds visual elements, such as corporate logos, photos and colour that make your contacts easy to scan and recognise.

- A variety of design options allow you to customise the card layout, text size and text colour.

- You can easily share contact information in a familiar and visible way by attaching Electronic Business Cards in messages to other people. Recipients who use Outlook 2010 or 2007 will see the Electronic Business Card in the message, shown just as you sent it, which they can save to their contacts. Recipients with earlier versions of Outlook or other email applications that use HTML to view email will see the Electronic Business Card in their message, but only as an image. They will also receive an attached *.vcf* file that contains the card's information which they can open and save to their contacts.

- You can include your Electronic Business Card in your email signature to send your contact information to other people, either automatically or as you choose.

VIEWING YOUR CONTACTS

Outlook offers a variety of *Contact* views so that you can find and see information in a way that best suits your requirements. In Outlook 2010, the default view is *Business Cards* view. In this view, the contacts appear as a group of cards similar to traditional paper-based business cards. An alphabetical index enables you to quickly find the contact you want.

Try This Yourself:

Open File

Before starting this exercise you MUST open the file Watsonia_14.pst...

1 Click on **[Contacts]** in the *Navigation* pane to display the contacts in Outlook, then click on *Contacts – Watsonia_14* under *My Contacts*

The contacts will appear in the view that was used when Contacts was last accessed...

2 Click on *Business Cards* in the *Current View* group to display the contacts in the default view

3 Click on *st* in the alphabetical index located to the right of the window to see contacts beginning with *S* and *T*

4 Click on *Phone* in the *Current View* group to display the names and telephone numbers of the contacts

5 Click on *List* in the *Current View* group to display details such as Job Title and Country

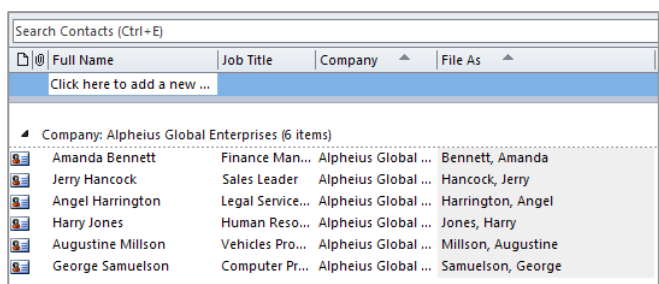**6** Repeat step *2* to change back to the default view

2

Bennett, Amanda	**Hancock, Jerry**
Amanda Bennett Alpheius Global Enterprises Finance Manager 61 3 9844 0017 Work abennett@alpheiusglobal.com	**Jerry Hancock** Alpheius Global Enterprises Sales Leader 61 3 9844 1234 Work
Harrington, Angel	**Jones, Harry**
Angel Harrington Alpheius Global Enterprises Legal Services Leader 61 3 9844 2134 Work	**Harry Jones** Alpheius Global Enterprises Human Resources Manager 61 3 9844 1956 Work hjones@alpheiusglobal.com

Search Contacts (Ctrl+E)

4

Search Contacts (Ctrl+E)

Full Name	Company	File As	Country/Region
Click here to add a new ...			
Amanda Bennett	Alpheius Global ...	Bennett, Amanda	
Jerry Hancock	Alpheius Global ...	Hancock, Jerry	
Angel Harrington	Alpheius Global ...	Harrington, Angel	
Harry Jones	Alpheius Global ...	Jones, Harry	
Augustine Millson	Alpheius Global ...	Millson, Augustine	
George Samuelson	Alpheius Global ...	Samuelson, George	

5

Search Contacts (Ctrl+E)

Full Name	Job Title	Company	File As
Click here to add a new ...			
Company: Alpheius Global Enterprises (6 items)			
Amanda Bennett	Finance Man...	Alpheius Global ...	Bennett, Amanda
Jerry Hancock	Sales Leader	Alpheius Global ...	Hancock, Jerry
Angel Harrington	Legal Service...	Alpheius Global ...	Harrington, Angel
Harry Jones	Human Reso...	Alpheius Global ...	Jones, Harry
Augustine Millson	Vehicles Pro...	Alpheius Global ...	Millson, Augustine
George Samuelson	Computer Pr...	Alpheius Global ...	Samuelson, George

For Your Reference...

To *access* and *view* your *contacts*:
1. Click on **[Contacts]** in the *Navigation* pane
2. Click on the desired option in the *Current View* group

Handy to Know...

- You can create a custom view for displaying your contacts. To do this, click on the *More* button for *Current View* and select **Manage Views** to open the *Manage All Views* dialog box. Click on **[New]** to open the *Create a New View* dialog box, type a name and then add and remove fields as desired.

CREATING A NEW CONTACT

Details for contacts are recorded in a Contact form. Outlook lets you record a great deal of information about a contact. But, yo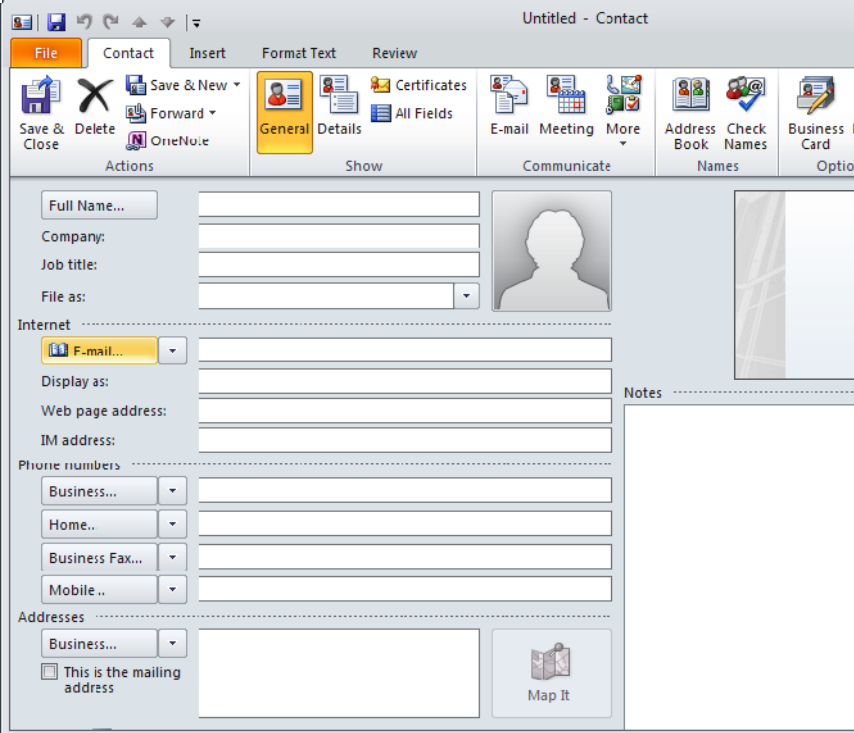u can elect to record relatively simple details for a contact, such as their name and address, or record a great deal of detail including birth dates, anniversaries and email addresses.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file Watsonia_14.pst…

1 Click on **New Contact** 📇 in the **New** group to open a new **Contact** window

2 Click on the four tabs in the ribbon (**Contacts**, **Insert**, **Format Text** and **Review**) to see what you can include and do to a contact

1

For Your Reference…

To *create* a *new contact*:
1. Click on **New Contact** 📇 in the **New** group to open a new **Contact** window
   or
   Press Ctrl + N in Contacts

Handy to Know…

- You can create a new contact from an existing contact. Click on a contact in **Business Cards** view, press Ctrl + C and then Ctrl + V. Click on **Add new contact** in the **Duplicate Contact Detected** dialog box and click on **[Add]**. Double-click on the new contact and make the desired changes.

ENTERING CONTACT DETAILS

You can record quite a few details about your contacts, ranging from name and address details through to birthdays and anniversaries. How much or how little you enter is up to you. There are a number of useful tools (such as the *Check Full Name*, *Phone Numbers* and *Address* boxes) that help you to enter the data in a format recognised by Outlook.

Try This Yourself:

Continue using the previous file with this exercise…

1 Click on **[Full Name]** to open the *Check Full Name* dialog box, complete the details as shown, then click on **[OK]**

2 Click on **[Business]** in *Phone numbers* to open the *Check Phone Number* dialog box, complete the details as shown, then click on **[OK]**

3 Click on **[Business]** in *Addresses* to open the *Check Address* dialog box, complete the details as shown, then click on **[OK]**

4 Complete the following details

Company	LeRoc
Job Title	Partner
Email	ppaston@ LeRoc.co.fr
Web page address	www.leroc.co.fr
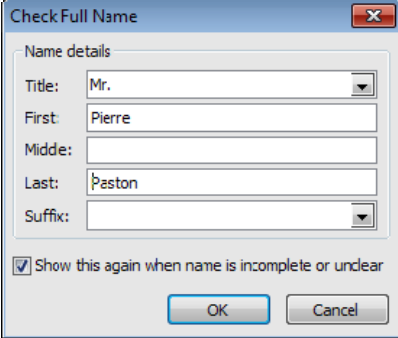
5 Click on *Details* 📧 in the *Show* group, then complete the following details

Manager's name	Stephanie Berger
Assistant's name	Marie Claude
Spouse/Partner	Helene
Birthday	10 October
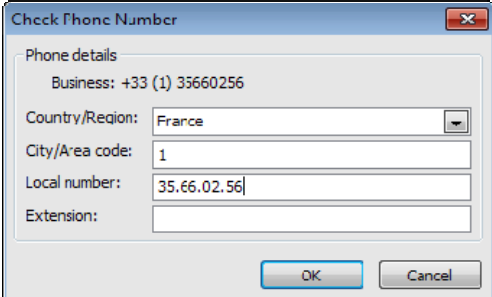
You will need to click on [OK]…

6 Click on *Save & Close* 📧, then click on **[No]** if you are asked to save the birthday to your personal calendar

1

Check Full Name

Name details

Title: Mr.
First: Pierre
Midde:
Last: Paston
Suffix:

☑ Show this again when name is incomplete or unclear

OK   Cancel

2

Check Phone Number

Phone details
Business: +33 (1) 35660256

Country/Region: France
City/Area code: 1
Local number: 35.66.02.56
Extension:

OK   Cancel

3

Check Address

Address details

Street: 567, rue Lauriston

City: Paris
State/Province:
ZIP/Postal code: 75116
Country/Region: France

☑ Show this again when address is incomplete or unclear

OK   Cancel

For Your Reference…

To **enter details** into a **new contact form**:
1. Click in the desired fields in the *Contact* form and type the appropriate information
2. Click on *Save & Close* 📧

Handy to Know…

- Wherever possible, find out the email address of the contact and include it in the card as you enter the new details. Even though you may not have a need to use it right now, you probably will in the near future!

EDITING CONTACT DETAILS

Once you have created a new contact you can change any of its details at any time. If you have to alter an address, telephone number or email details you can do this directly in **Card** view. But to make other changes, you must open the contact form for the person by double-clicking on their name – irrespective of the current view.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file Watsonia_14.pst…

1. Click on **Card** in the **Current View** group, then click on **op** to locate the card for **Pierre Paston**

    You can change any of the details visible in this view. Let's change the address…

2. Click to the left of **567** – the address box will change to edit mode – change the street address to **333 rue Laurison**, and then click on **Pierre's name**

    To change other details, you must open the contact form…

3. Double-click on the orange titlebar of **Pierre Paston's** address card to open his contact details

4. Change **Job Title** to **Senior Partner**, then click on **Save & Close** 🖫 to save and close the changes

5. Click on **Business Cards** in the **Current View** group, then click on **op** to locate the card for **Pierre Paston** – his card should reflect the changes

For Your Reference…

To **edit contact details**:
1. Double-click on the contact
2. Make the desired changes
3. Click on **Save & Close** 🖫

Handy to Know…

- You can double-click on an electronic business card to open the contact's details for editing.

INSERTING A CONTACT PICTURE

The Contact form has provision for the inclusion of a picture file. While normally one would expect to see a picture of the contact here, the picture could be of anything that is relevant to the contact and may include the company logo, a picture of the contact's premises, the contact's car, or maybe even the person who is assigned as the contact's account manager.
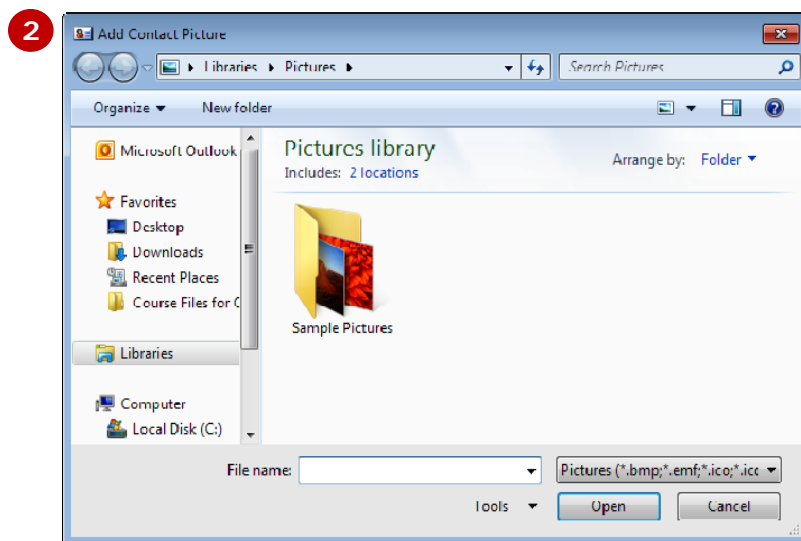
Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file Watsonia_14.pst...

1 Double-click on **Pierre Paston** to display his details in the **Contact** window

2 Click on **Picture** in the **Options** group and select **Add Picture** to open the **Add Contact Picture** dialog box

3 Navigate to the **Course Files for Outlook 2010** folder, click on **Monsieur Paston.png** and then click on **[OK]** to insert the picture

4 Click on **Save & Close** to save and close the **Contact** window

For Your Reference...

To *insert* an *image* into a contact:
1. Double-click on the contact
2. Click on **Picture** in the **Options** group and select **Add Picture**
3. Select the image and click on **[OK]**
4. Click on **Save & Close**

Handy to Know...

- Naturally, there are privacy issues that come into play when dealing with pictures of other people. You should only include a photo if you have been given permission to do so.

- You can also open the **Add Contact Picture** dialog box by double-clicking on the picture icon in the **Contact** window.

ADDING CONTACTS FOR AN EXISTING COMPANY

If you deal with large customers and suppliers, chances are you will have more than one contact in any given company. *Contacts* lets you record the company details once and then replicate those company-related details for other contacts who work in the same company.
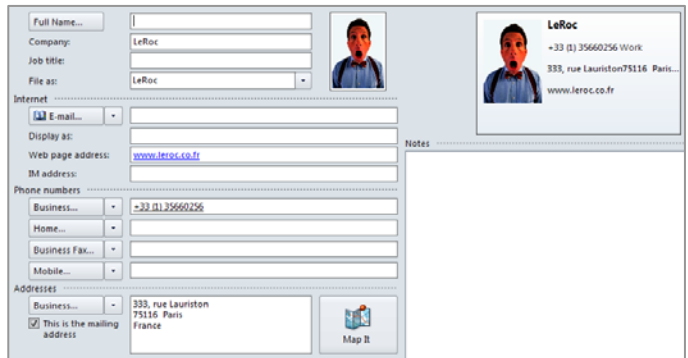

Try This Yourself:

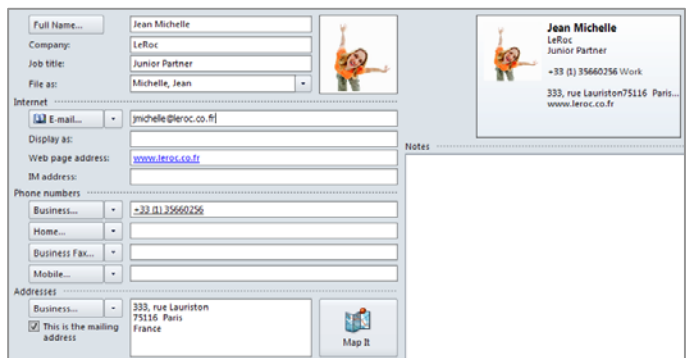*Continue using the previous file with this exercise…*

1 Double-click on *Pierre Paston* to display his details in the *Contact* window

2 Click on the drop arrow ⏷ for *Save & New* 📇 in the *Actions* group and select **Contact from the Same Company**

Notice how some of the standard details remain for the new contact, but other fields are blank…

3 Complete the following details

   Name   Jean Michelle
   Job Title Junior Partner
   Email   jmichelle@leroc.co.fr

4 Double-click on the picture to the right of the Name and Company details to open the *Change Contact Picture* dialog box

5 Double-click on *Jean Michelle.png* in the course files folder

6 Click on *Save & Close* 📇, then close the *Contact* window

②

⑤

For Your Reference…

To *add* a new *contact* for an *existing company*:

1. Double-click on a contact in the same company
2. Click on *Save & New* 📇 and select **Contact from the Same Company**
3. Enter the details and click on *Save & Close*

Handy to Know…

- Being able to add new contacts for an existing company is particularly useful if you have a number of contacts to enter from the same company – perhaps you may have just won a contract with a large company and you will need to keep in contact with several of their employees.

CHANGING A BUSINESS CARD LAYOUT

When you create a new contact, Outlook automatically creates a corresponding electronic business card based on the default layout. If you want to change the appearance of the business card for a particular contact – for example, you may want to include additional data fields or format the text – you can do so easily using the *Edit Business Card* feature.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file Watsonia_14.pst…

1 Double-click on *Jean Michelle* to display her details in the *Contact* window

2 Click on *Business Card* 🖼 in the *Options* group to open the *Edit Business Card* dialog box

Let's change things…

3 Click on *Business Address* under *Fields* then click on **[Remove]**

4 Click on the first *Blank Line* under *Business Home Page* and click on 🔼 twice

5 Click on *Business Phone* to display it in the *Edit* box, then click on *Bold* 🅱 then on *Increase Font Size* 🅰
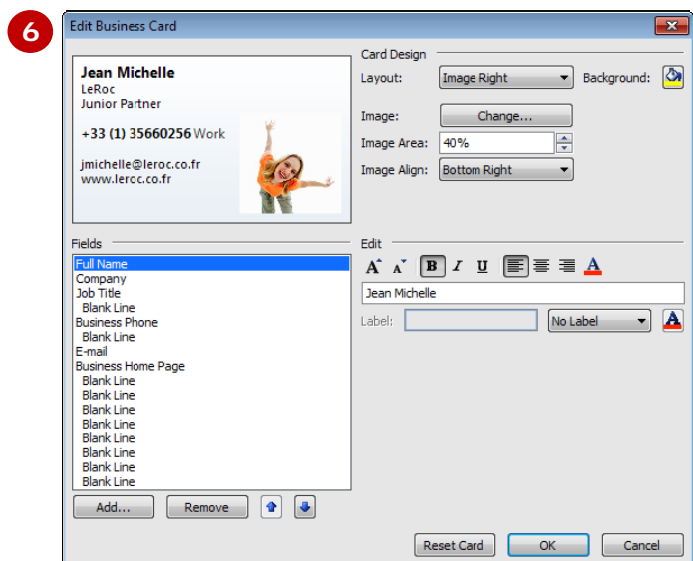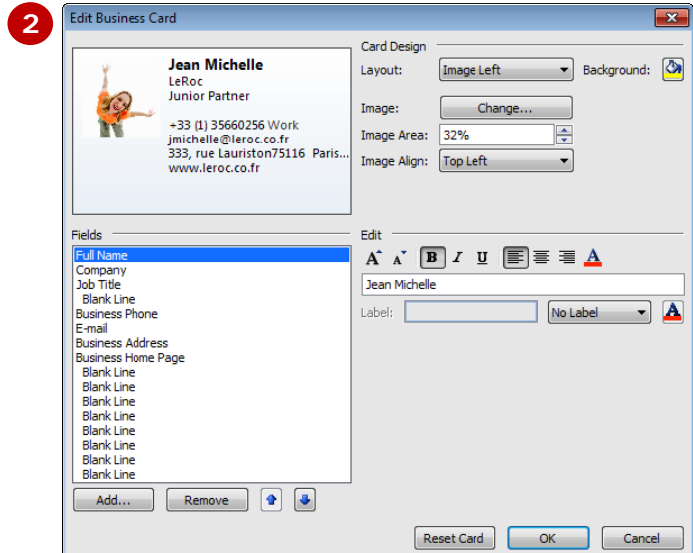
6 Change the following *Card Design* options

Layout Image Right
Image Area 40%
Image Align Bottom Right

7 Click on **[OK]** to return to the *Contact* window, then click on *Save & Close* 💾

For Your Reference…

To *change* the *design* of a single *business card*:
1. Double-click on the contact
2. Click on *Business Card* 🖼 in the *Options* group
3. Change the *fields*, *card design* and edit the font as desired, then click on **[OK]**

Handy to Know…

* To return the layout of an electronic business card to the default layout, click on **[Reset Card]** in the *Edit Business Card* dialog box.
* To include additional fields in an electronic business card, click on **[Add]** in the *Edit Business Card* dialog box and select the desired fields.

DELETING AN UNWANTED CONTACT

Over a period of time you'll most likely build up a decent list of contacts. Nothing in life ever stays static – people change positions or jobs – and as your list grows, you will need to make many changes to keep it up-to-date. To ensure your list is as clean as possible, you should occasionally weed out redundant contacts. Outlook lets you easily delete unwanted contacts from the listing.
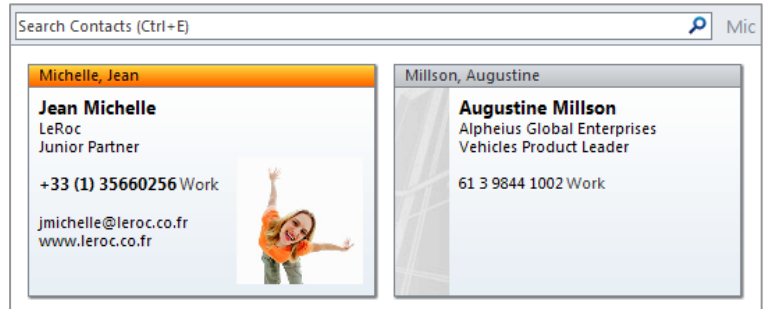
Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file Watsonia_14.pst…

1 Click on the contact *Jean Michelle* to select it

2 Click on *Delete* ☒ in the *Delete* group to remove the contact

The contact, Augustine Millson, will now be the selected contact

For Your Reference…

To *delete* an unwanted *contact*:

1. Click on the contact to select it
2. Click on *Delete* ☒

Handy to Know…

- Deleted contacts are sent to the *Deleted Items* folder. But, if you wish to permanently delete a contact, press [Shift] + [Del].

RECOVERING A DELETED CONTACT

When you delete a contact, the details for that contact are placed in the *Deleted Items* folder. If you have discovered that you accidentally deleted the wrong contact and want to resurrect that contact card, you can open the *Deleted Items* folder and move the contact back to the *Contacts* folder again.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file Watsonia_14.pst…

1 Click on *Folder List* 📁 at the bottom of the *Navigation* pane to list all folders in the *Navigation* pane

2 Expand *Watsonia_14* (if it is not already expanded) and click on *Deleted Items* to see the items in this folder

The top item should be Jean Michelle's contact record…

3 Ensure that Jean Michelle's record is selected, then click on *Move* 📋 in the *Move* group

A list of ten recently visited folders will display…

4 Select **Other Folder** to open the *Move Items* dialog box, then scroll down to and expand the *Watsonia_14* folder

5 Click on *Contacts* under *Watsonia_14*, then click on **[OK]**

6 Open *Contacts* and confirm that *Jean Michelle* is present again

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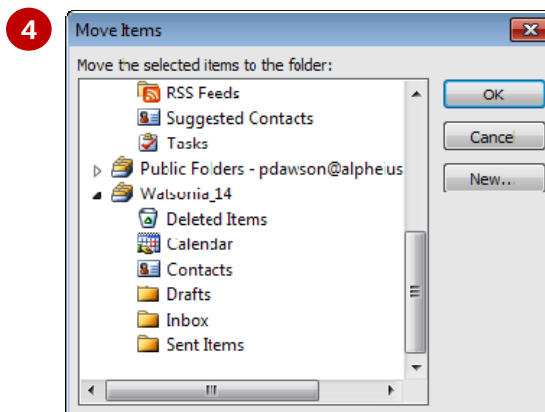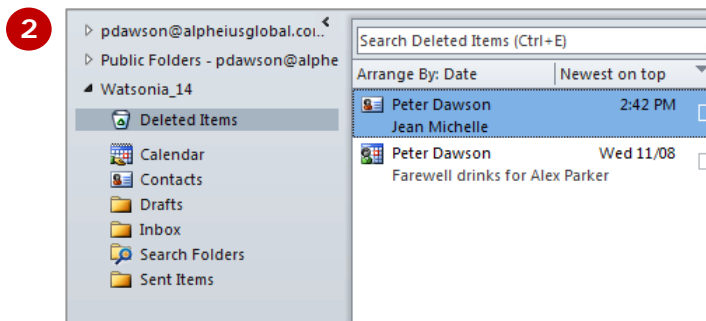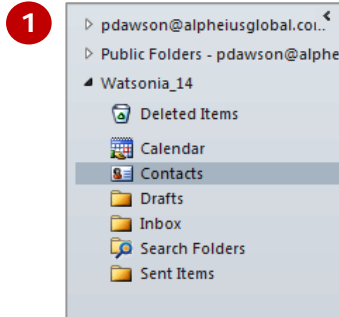
For Your Reference…

To *recover* a *deleted contact*:

1. Select the record in the *Deleted Items* folder
2. Click on *Move* 📋 in the *Move* group and select **Other Folder**
3. Select the destination folder
4. Click on **[OK]**

Handy to Know…

- If you delete a contact item from the *Deleted Items* folder it will be gone forever.

- You can also right-click on a deleted record in the *Deleted Items* folder and select **Move** > **Other Folder**.

PRINTING CONTACT DETAILS

If you are away from the office and don't want to drag your laptop and its contacts listing around with you, then you can print your listing. When you print the listing you can print it on normal A4-size paper or, if your printer is up to it, you can print the listing in a booklet style where it can be created as a pocket-size edition.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file Watsonia_14.pst…

1 Ensure that *Business Cards* is the current view, then click on the *File* tab and click on **[Print]** to display the *Print* settings in *Backstage view*

The Current View will determine what Print Style options are available in the Print dialog box…

2 Click on *Medium Booklet Style* under *Settings* to see this style

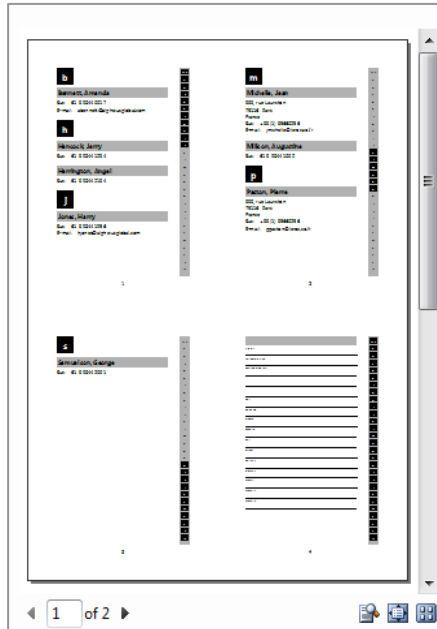*You can navigate the document and change the magnification using the tools under the preview pane…*

3 Click on *Phone Directory Style* under *Settings* to see this style

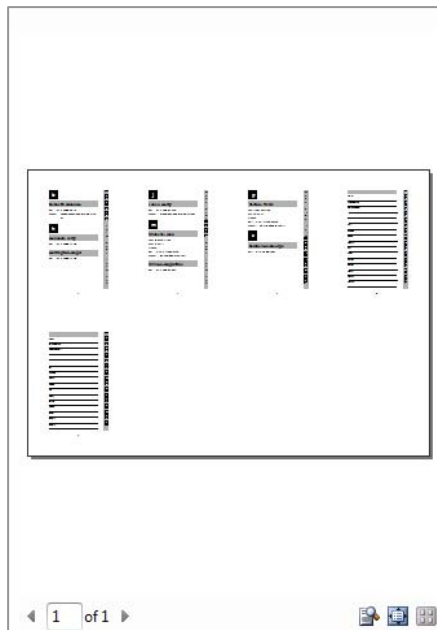**4** Click on *Small Booklet Style* under *Settings* to see this style

Let's print this style…

5 Click on **[Print]** to print the contact list

For Your Reference…

To *print* the *contact* listing:
1. Ensure the contact listing appears in the desired view
2. Click on the *File* tab and click on **[Print]**
3. Select the desired options
4. Click on **[Print]**

Handy to Know…

- If you want to print only specific contacts, select them before opening *Backstage view*. You must then click on **[Print Options]**, select *Only selected items* under *Print range* and click on **[Print]**. You can also select to print only particular pages by clicking on **[Print Options]**.

CONCLUDING REMARKS

Congratulations!

You have now completed the **Contacts** booklet. This booklet was designed to get you to the point where you can competently perform a variety of operations as listed in the objectives on page 2.

We have tried to build up your skills and knowledge by having you work through specific tasks. The step by step approach will serve as a reference for you when you need to repeat a task.

Where To From Here...

The following is a little advice about what to do next:

- Spend some time playing with what you have learnt. You should reinforce the skills that you have acquired and use some of the application's commands. This will test just how much of the concepts and features have stuck! Don't try a big task just yet if you can avoid it - small is a good way to start.

- Some aspects of the course may now be a little vague. Go over some of the points that you may be unclear about. Use the examples and exercises in these notes and have another go - these step-by-step notes were designed to help you in the classroom and in the work place!

Here are a few techniques and strategies that we've found handy for learning more about technology:

- visit CLD's e-learning zone on the Intranet

- read computer magazines - there are often useful articles about specific techniques

- if you have the skills and facilities, browse the Internet, specifically the technical pages of the application that you have just learnt

- take an interest in what your work colleagues have done and how they did it - we don't suggest that you plagiarise but you can certainly learn from the techniques of others

- if your software came with a manual (which is rare nowadays) spend a bit of time each day reading a few pages. Then try the techniques out straight away - over a period of time you'll learn a lot this way

- and of course, there are also more courses and booklets for you to work through

- finally, don't forget to contact CLD's IT Training Helpdesk on **01243-752100**