**CHAPTER 10**

# MANAGING CONTACTS

**INFOCUS**

Contacts are a very important part of what we do each day. We regularly interact with our contacts and Outlook provides a rich array of tools to help us to manage and monitor our contacts.

For example, you can use your contact information to call someone, email them and invite them to a meeting. You can also create contact groups for people with whom you communicate as a group.

### In this session you will:

- ✓ learn how to send an email to a contact
- ✓ learn how to create a new contact from an email
- ✓ learn how to send an electronic business card in an email message
- ✓ learn how to receive a business card and add it as a new contact
- ✓ learn how to create a contact group
- ✓ learn how to use a contact group
- ✓ learn how to send messages to only some members in a contact group
- ✓ learn how to delete members from a contact group
- ✓ learn how to set up *Outlook* to automatically record interactions with contacts
- ✓ learn how to manually enter contact encounter details
- ✓ learn how to record the time spent with a contact
- ✓ learn how to review encounters with your contacts.

# EMAILING A CONTACT

If you have entered email address details for a contact, then sending them an email is a cinch. When a contact is selected in the listing, Outlook is smart enough to retrieve the appropriate email details and show them in a new message for that contact. In addition to emailing a contact, you can invite them to a meeting, create a task for them, plus more.

## Try This Yourself:

*Open File*

*Before starting this exercise you MUST open the file Watsonia_16.pst...*

1. Click on **[Contacts]**, then click on *Contacts - Watsonia_16* under *My Contacts*

2. Using the alphabetical index, locate the business card for *Anthony O'Brien*

3. Click on his business card

   *The various ways in which you can communicate with a contact are shown in the Communicate group on the ribbon...*

4. Click on *E-mail* 🖼 in the *Communicate* group to open a new Message window with the contact's email address already entered in *To*

   *Normally you would complete and send the message. But because this is a fictitious contact, we'll close the message without saving it...*

5. Press Esc and click on **[No]**
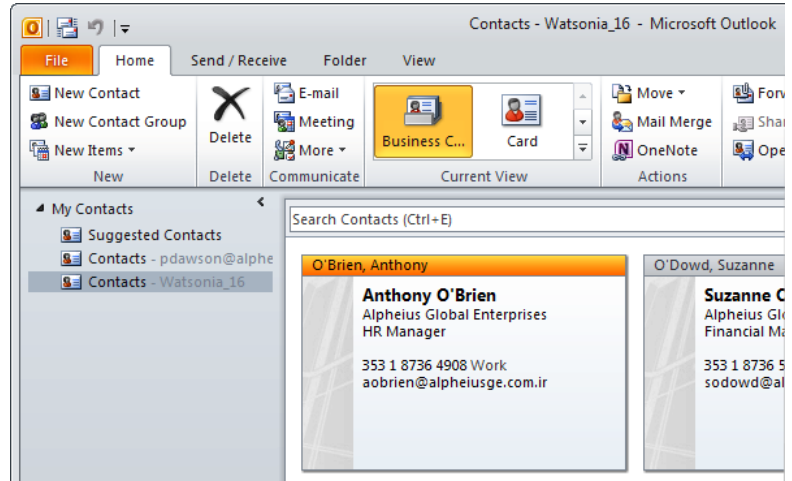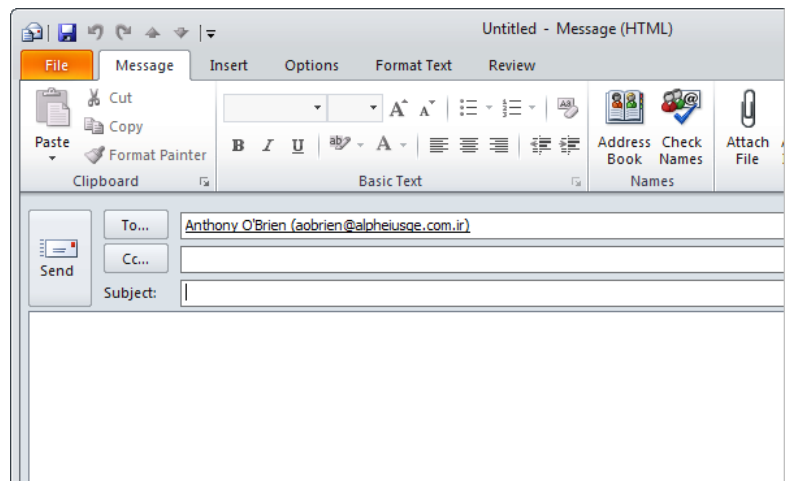




## For Your Reference…

To *send* an *email* to a *contact*:

1. Click on **[Contacts]** in the *Navigation* pane
2. Click on the contact
3. Click on *E-mail* 🖼 in the *Communicate* group
4. Complete and send the email

## Handy to Know…

- To use *Call* 📞 you must have an automated dialling function that lets you call contacts from your computer via a telephone line.

# ADDING A CONTACT FROM AN EMAIL

If you receive an email from someone who is not currently in your contacts listing you can have Outlook use the email details to create a new contact form for the person. Additional information, such as the name details, will also be placed in the form. You can then edit the form to add whatever additional information you may need.

## Try This Yourself:

*Same File*

*Continue using the previous file with this exercise...*

**1** Click on **[Mail]** in the Navigation pane and then click on the *Inbox* under *Watsonia_16*

**2** Click on the message from *Svetlana Ludowyk* to see it in the Reading pane

**3** Right-click on *Svetlana's* name in the header region and select **Add To Outlook Contacts**

*A new contact form containing Svetlana's details will open in a Contact window...*

**4** Click on *Save & Close* 💾 to save the *Contact* details

**5** Click on **[Contacts]** to open *Contacts*, and click on *Contacts* under *My Contacts* to see the new contact

**6** Click on *Contacts - Watsonia_16* under *My Contacts*

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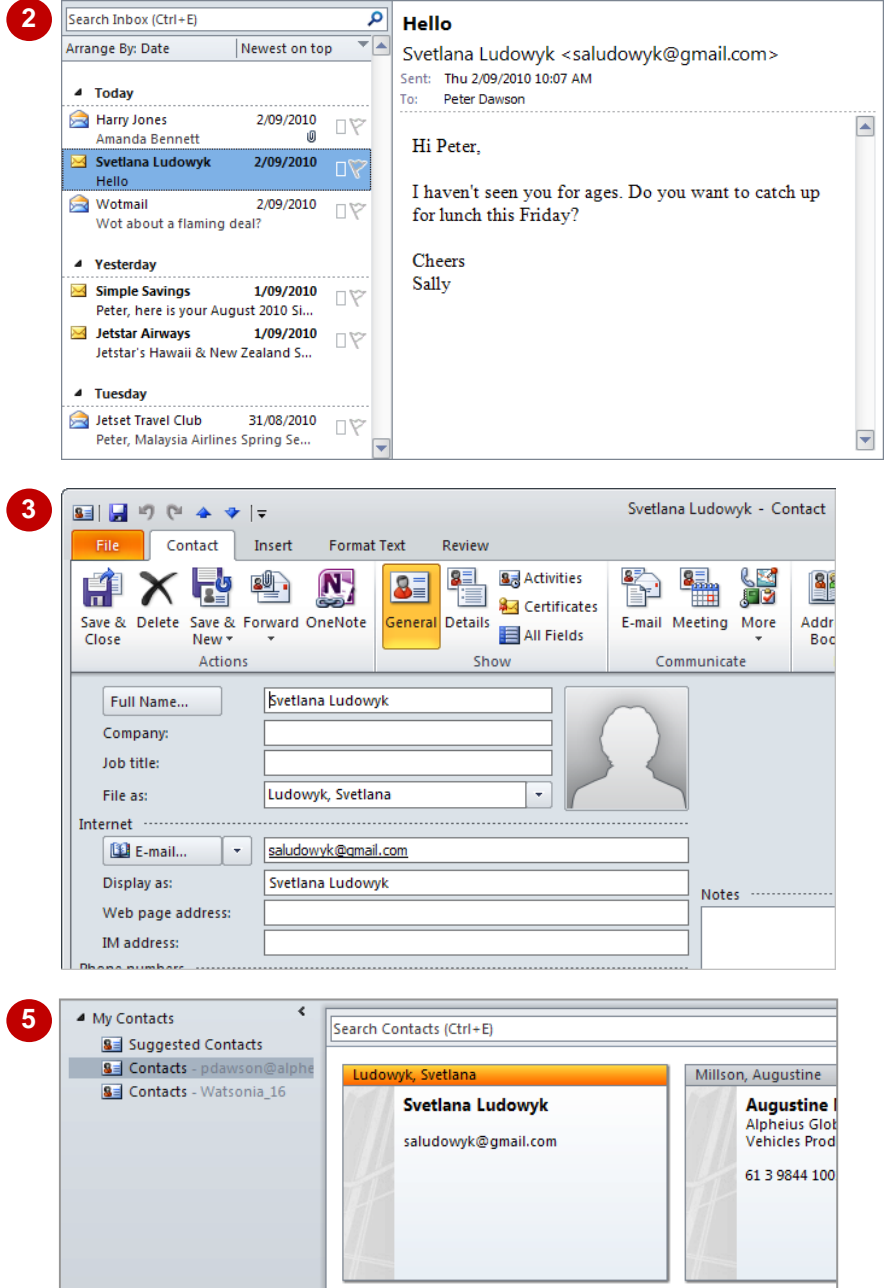
## For Your Reference…

To *add* a *contact* from an *email*:

1. Double-click on the message
2. Right-click on the contact's email address in *From*
3. Select **Add To Outlook Contacts**
4. Click on *Save & Close* 💾

## Handy to Know…

- When creating a contact from an email message, the new contact details will be automatically saved into the contacts list in the default Outlook data file.

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# SENDING AN ELECTRONIC BUSINESS CARD

You can send an electronic business card to other users who can then, in turn, save the card into their own Contacts folder. You can even send your own details via an electronic business card, but first you must create a new contact with your details and then you can send your card just like any other card.

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**Try This Yourself:**

*Same File*

*Continue using the previous file with this exercise, or open the file Watsonia_16.pst...*

1. Click on the business card for **Angel Harrington**

2. Click on **Forward Contact** in the **Share** group and select **As a Business Card**

   *A new message window will open containing an image of the business card as well as the attached Angel Harrington.vcf file. This method is ideal for recipients who use Outlook 2010 or 2007...*

3. Address the message to yourself and then send it

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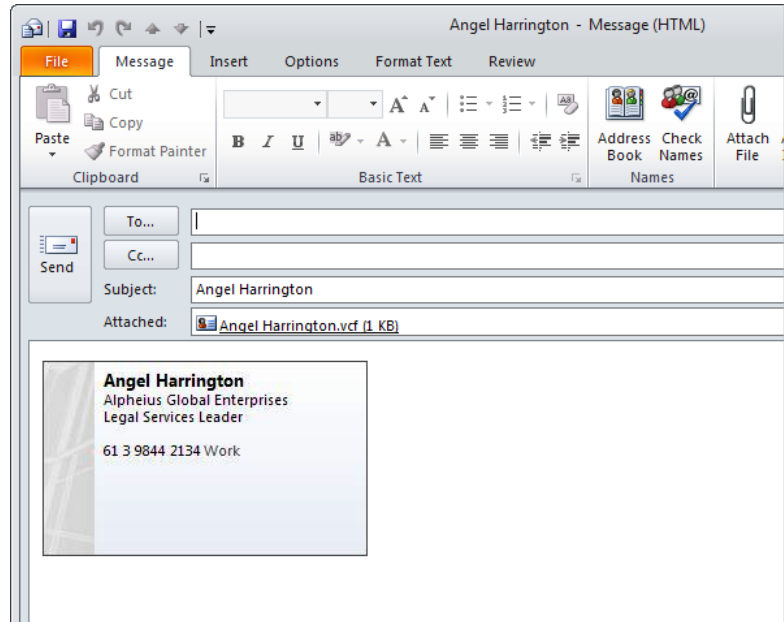
**For Your Reference…**

To **email** an **electronic business card**:

1. Click on the business card
2. Click on **Forward Contact** in the **Share** group
3. Select **As a Business Card** or **As an Outlook Contact**

**Handy to Know…**

- You can send a business card from within a new Message window by clicking on **Attach Item** in the **Include** group and selecting **Business Card**.

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# RECEIVING AN ELECTRONIC BUSINESS CARD

If a person receives a message containing an electronic business card and they are using Outlook 2010 or 2007, they can add the card, along with any customised formatting, to their

Contacts directly from the image of the card. But, recipients who are using earlier versions will have to open the attached .vcf file – the image of the business card will not be visible – and then save it.

## Try This Yourself:

*Same File*

*Continue using the previous file with this exercise, or open the file Watsonia_16.pst...*

1 Click on **[Mail]**, then click on *Inbox* under *Watsonia_16*

2 Click on the message from *Harry Jones* to see it in the Reading pane

3 Right-click on the image of the electronic business card in the body of the message and select **Add to Outlook Contacts**

*A new contact form will open containing Amanda's details...*

4 Click on *Save & Close* 💾 to add the contact

5 Click on **[Contacts]**, then click on *Contacts* under *My Contacts* to see the new contact
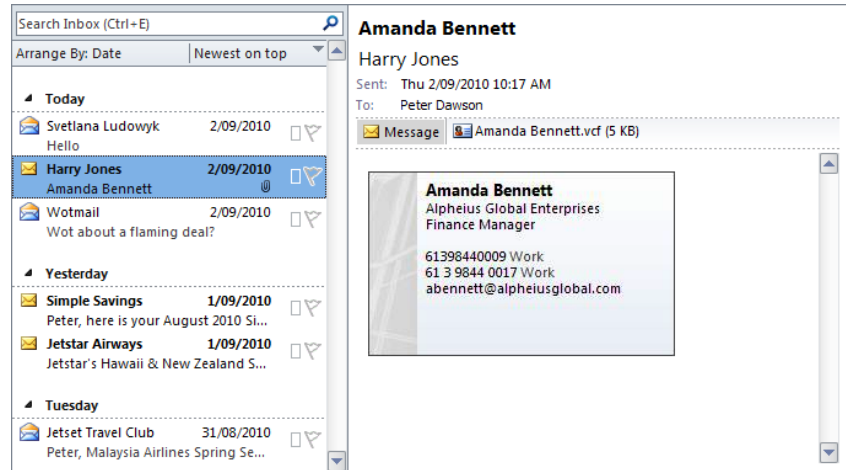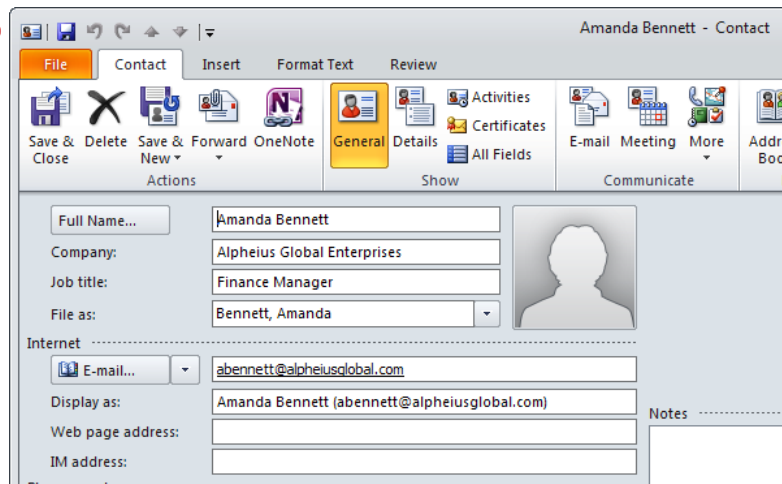
## For Your Reference…

To *add* a *contact* from a *business card*:

1. Click on the message
2. Right-click on the business card image
3. Select **Add to Outlook Contacts**
4. Click on *Save & Close* 💾

## Handy to Know…

- People who view their email in plain text will not see the visual representation of the Electronic Business Card in the message, but they will receive the .vcf file attachment which they can save to their contact lists.

# CREATING A CONTACT GROUP

If you are dealing with the same group of contacts on a regular basis, you can bundle the contacts together into a *contact group*. A contact group is simply a collection of contact email addresses. When sending messages, you only need to enter the contact group in the *To* box and the message will be sent to all members in the group.
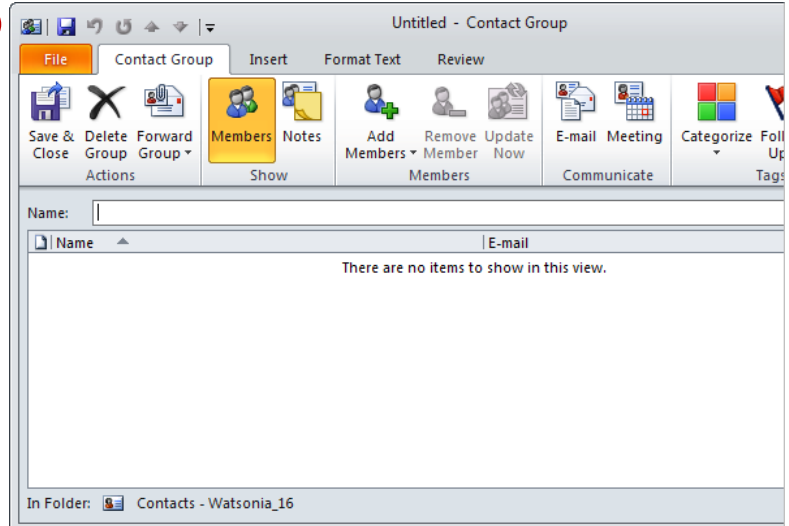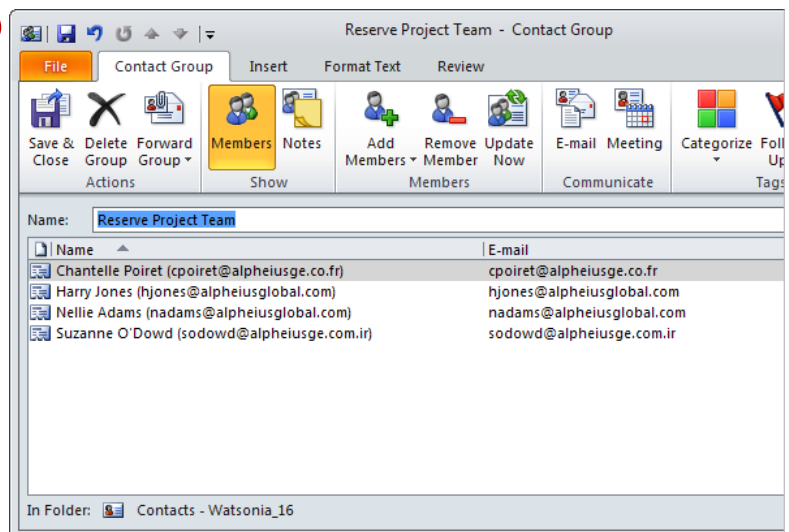
## Try This Yourself:

*Same File*

*Continue using the previous file with this exercise, or open the file Watsonia_16.pst...*

1. Click on *Contacts* under *My Contacts*

2. Click on *New Contact Group* 📇 in the *New* group to open a new *Contact Group* window

3. Type **Reserve Project Team** in *Name*

4. Click on *Add Members* 👤 in the *Members* group, then select **From Outlook Contacts** to open the *Select Members* dialog box

5. Double-click on four names to add them to the members' list, then click on [OK]

6. Click on *Save & Close* 💾

**2** [Screenshot: Untitled - Contact Group window with empty Name field and "There are no items to show in this view."]

**5** [Screenshot: Reserve Project Team - Contact Group window]

| Name | E-mail |
| --- | --- |
| Chantelle Poiret (cpoiret@alpheiusge.co.fr) | cpoiret@alpheiusge.co.fr |
| Harry Jones (hjones@alpheiusglobal.com) | hjones@alpheiusglobal.com |
| Nellie Adams (nadams@alpheiusglobal.com) | nadams@alpheiusglobal.com |
| Suzanne O'Dowd (sodowd@alpheiusge.com.ir) | sodowd@alpheiusge.com.ir |

In Folder: 📇 Contacts - Watsonia_16

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### For Your Reference…

To *create* a *contact group*:

1. Click on *New Contact Group* 📇
2. Type a *Name*
3. Click on *Add Members* 👤 and add the contacts
4. Click on *Save & Close* 💾

### Handy to Know…

- You can add a new member to a contact group who is not one of your contacts. Click on *Add Members* 👤, select **New E-mail Contact** and then enter the name and email details. If you tick *Add to Contacts* in the *Add New Member* dialog box, their details will be added to Contacts.

# USING A CONTACT GROUP

Contact groups are simply collections of email addresses. You work with a contact group as though it is a single email address. When the time comes to send the email message, Outlook will actually go into the collection of addresses in the group and send the message to each one.

## Try This Yourself:

*Same File*

*Continue using the previous file with this exercise...*

**1** Click on **[Mail]** in the Navigation pane, then create a new mail message

**2** Click on **To** to open the **Select Names** dialog box

**3** Click on the drop arrow ▾ for **Address Book** and select **Contacts** in **Address Book**

*Notice that the Reserve Project Team contact group appears in bold text…*

**4** Double-click on **Reserve Project Team**, then click on **[OK]** to insert the contact group's name into **To**

*If you were to click on the expand icon ⊞, the names of the members in the contact group would appear in To – just note however, that you cannot collapse the list again...*

**5** Complete the message and send it in the normal way, or press [Esc] to close the message and click on **[No]** to not save the message
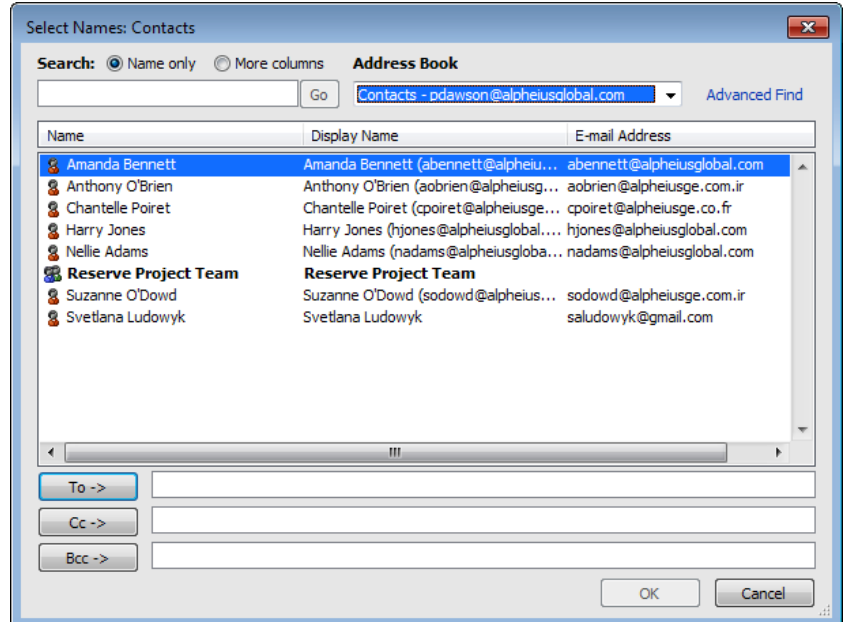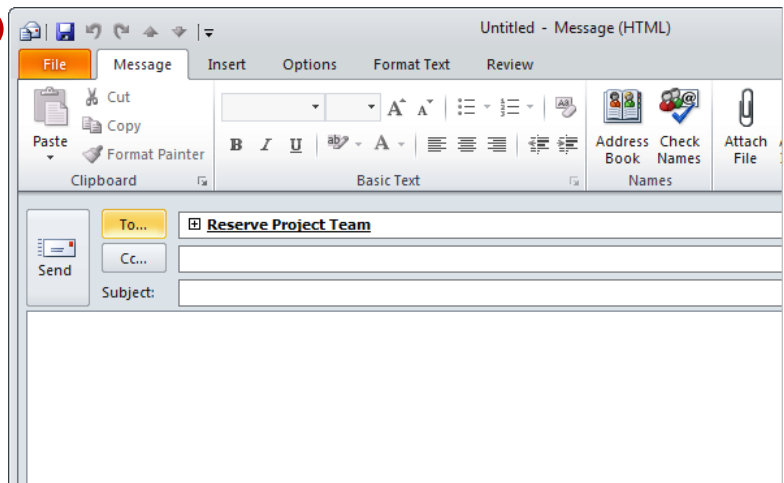




## For Your Reference…

To **use** a **contact group**:

1. Create a new mail message
2. Click on **To**
3. Double-click on the distribution list and click on **[OK]**
4. Complete and send the message

## Handy to Know…

- Contact groups appear in bold in normal address lists and also have a special icon showing two heads 👥 – rather than one for an individual. Their business cards in **Contacts** also appear different to those for an individual – the grey band down the left side of the card appears with two people.

# USING A PARTIAL CONTACT GROUP

A contact group is merely a collection of email addresses stored and used under one convenient name. When you send an email to a contact 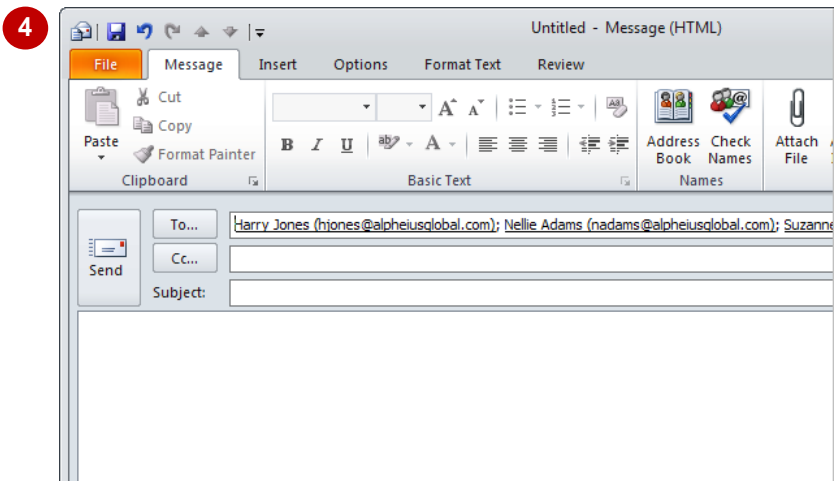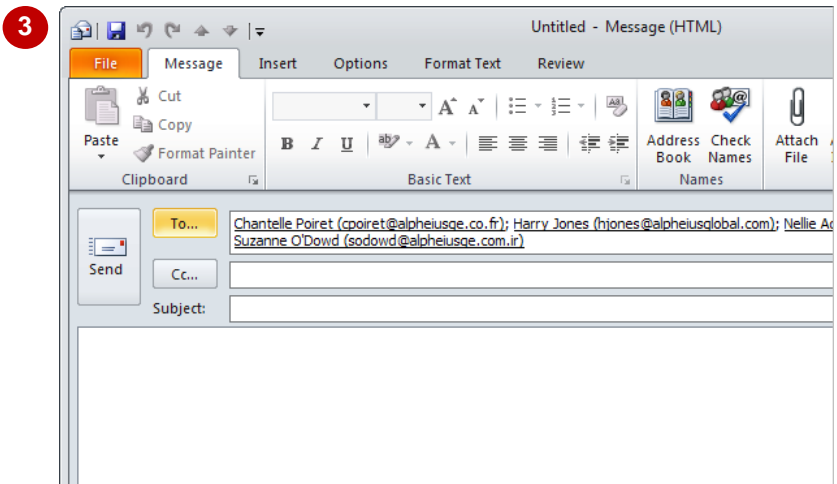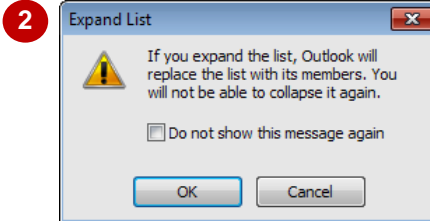group, you can send it to everyone in the group simply by using the contact group name. But, you can also expand the group name so that you can delete addresses that you wish to exclude for your message.

## Try This Yourself:

*Same File*

*Continue using the previous file with this exercise, or open the file Watsonia_16.pst...*

1. Create a new message, selecting the **Reserve Project Team** contact group in **To**

2. Click on the **expand** icon ⊞ to the left of the contact group name – a message may appear advising you that expanding the list cannot be reversed

3. Click on **[OK]** to proceed

   *The members' names will appear in To instead of the list name...*

4. Click on the first name to select it and press ⌷Del⌷, then press ⌷Del⌷ twice again to delete the spare semicolon and space

5. Complete the message and send it in the normal way, or press ⌷Esc⌷ to close the message and click on **[No]** to not save the message

**2**

**Expand List**

If you expand the list, Outlook will replace the list with its members. You will not be able to collapse it again.

☐ Do not show this message again

[OK]  [Cancel]

**3**

Untitled - Message (HTML)

To... | Chantelle Poiret (cpoiret@alpheiusge.co.fr); Harry Jones (hjones@alpheiusglobal.com); Nellie Ac Suzanne O'Dowd (sodowd@alpheiusge.com.ir)

**4**

Untitled - Message (HTML)

To... | Harry Jones (hjones@alpheiusglobal.com); Nellie Adams (nadams@alpheiusglobal.com); Suzanne

## For Your Reference…

To **use part** of a **contact group**:

1. Create a new mail message
2. Click on **To**, double-click on the distribution list and click on **[OK]**
3. Click on **expand** ⊞ and delete the unwanted members
4. Complete and send the message

## Handy to Know…

- If you find yourself deleting the same names from the contact group on a regular basis, simply create an additional contact group without these names and addresses in it!

# DELETING MEMBERS FROM A CONTACT GROUP

Contact groups comprise the address details for a group of people. You may have a contact group for your customers, friends, work colleagues, social club members, and so on. As time goes by and people move on to new positions, you will need to update the list including deleting people who are no longer valid for inclusion in a contact group.

## Try This Yourself:

*Same File*

*Continue using the previous file with this exercise, or open the file Watsonia_16.pst...*

**1** Click on **[Contacts]** in the Navigation pane, then click on *Contacts* under *My Contacts*

**2** Double-click on the *Reserve Project Team* contact group to open it

**3** Click on the name of a person who you want to remove, then click on *Remove Member* in the *Members* group to delete the member from the contact group

*This will remove the member from the contact group only, not from your Contacts list...*

**4** Click on *Save & Close* to save your change and close the contact group

**2**

**3**
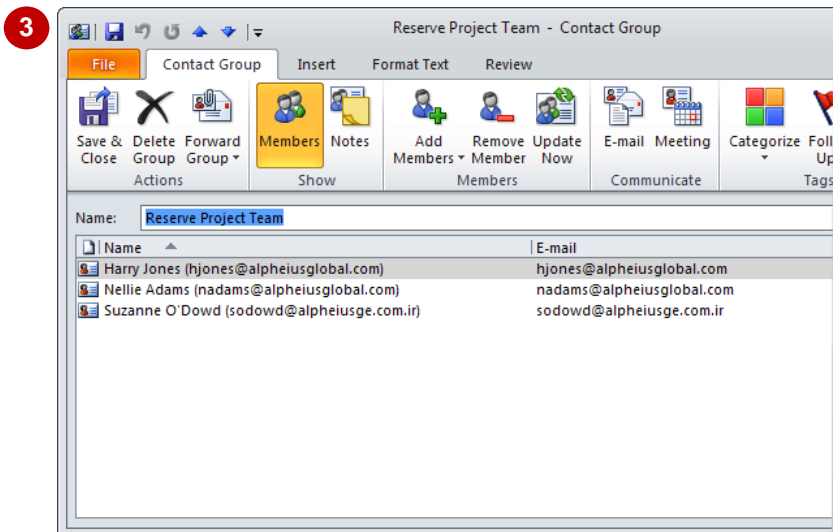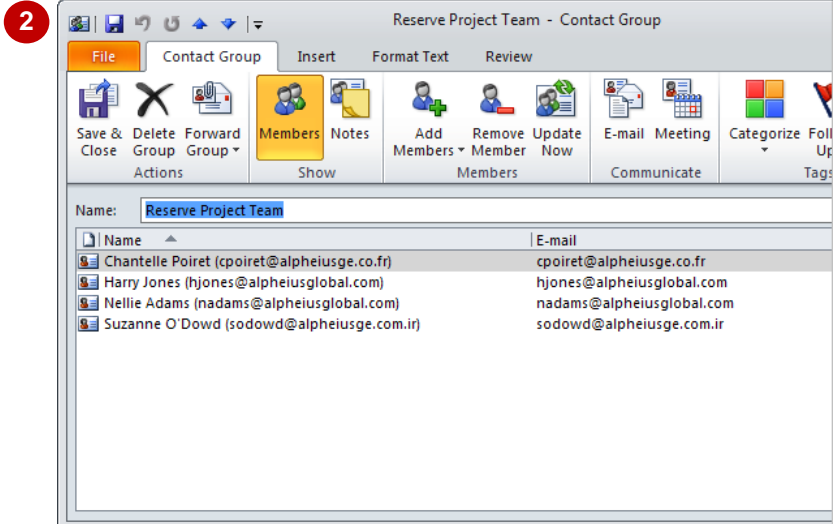
## For Your Reference…

To *delete* a *member* from a *contact group*:

1. Double-click on the contact group in Contacts
2. Click on the desired name, then click on *Remove Member* in the *Members* group
3. Click on *Save & Close*

## Handy to Know…

- To delete a contact group, click on its name in Contacts and click on *Delete*.
- If you click on *Delete Group* in the *Actions* group while trying to delete a selected member from a contact group, you will delete the entire contact group – no questions asked.

# SETTING CONTACT ACTIVITY OPTIONS

**Contacts** lets you automatically record the encounters you have with your contacts. For example, you may want to keep a record of emails you send to someone or record the time spent on the telephone with a client. Once you have specified what should be recorded, you don't need to take any further action – journal entries, recording the activity, will be automatically created.

## Try This Yourself:

*Same File*

*Continue using the previous file with this exercise...*

1 Click on **Contacts** under **My Contacts** to use the default data file's contact list

2 Click on the **File** tab, click on **[Options]**, then click on **Notes and Journals** to see their options

3 Click on **[Journal Options]** under **Contacts and Notes** to open the **Journal Options** dialog box

4 Tick **E-mail Message** and **Task request**

*This identifies that these are the activities that you always want to record for the selected contact/s...*

5 Tick a contact to select whose activities you want to record

6 Tick **Microsoft Word**

*Because this is an exercise, we won't save these settings...*

7 Click on **[Cancel]** and then on **[Cancel]** to close the dialog boxes without saving the settings

**2**

**3**
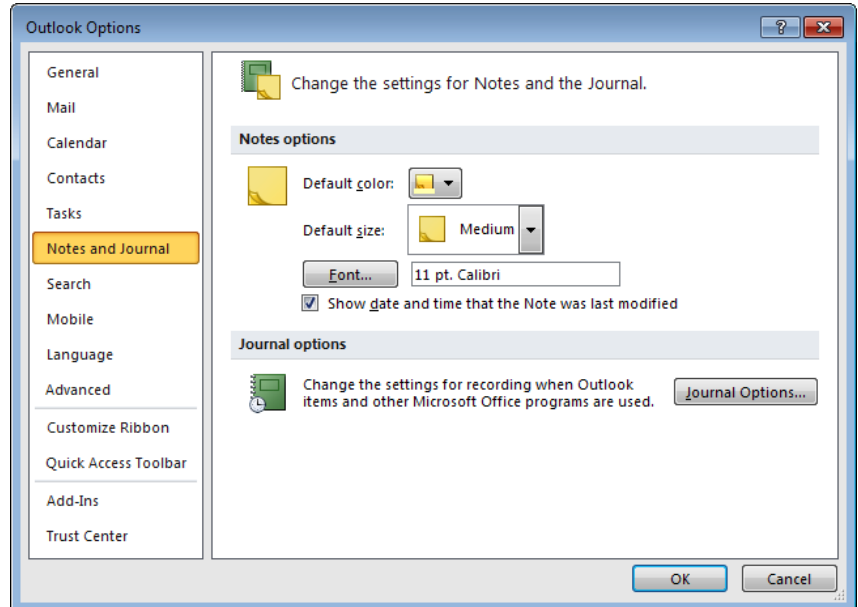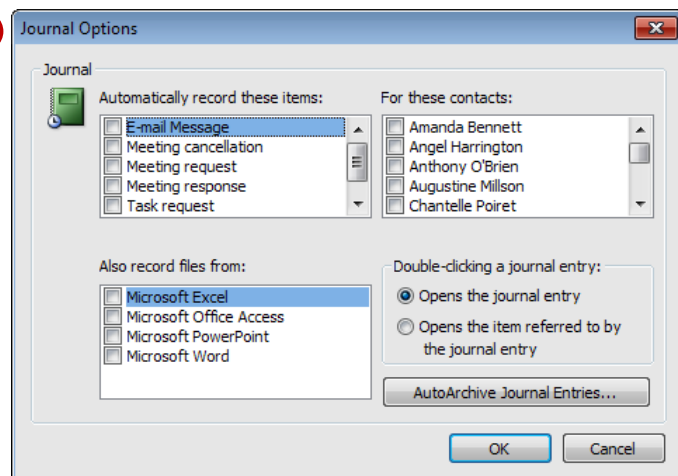
## For Your Reference…

To **set contact activity** options:

1. Select **File** > **Options** > **Notes and Journals**
2. Click on **[Journal Options]**
3. Set the desired options
4. Click on **[OK]** and on **[OK]**

## Handy to Know…

- You can only set contact activity options with your **Personal Folders** contacts listing − after all, you are trying to keep track of encounters with *your* contacts, not those in a fictional data file or those who everyone associates with (Mailbox and global lists).

# MANUALLY RECORDING CONTACT ENCOUNTERS

You can manually enter encounters that you have with your contacts. For example, you may wish to record the fact that you have rung a contact and note the issues that you discussed.

The nice thing about Outlook *Contacts* is that you can also specify the type of encounter you had. Types such as *phone call*, *conversation*, *meeting*, *letter*, and the like can be recorded.

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### Try This Yourself:

*Same File*

*Continue using the previous file with this exercise...*

1. Click on *Contacts – Watsonia_16* under *My Contacts*

2. Click on *New Items* 🖼️ then select **More Items** > **Journal Entry** to open a *Journal Entry* window

3. Type **Tender Documentation** in *Subject*

4. Click on *Address Book* 📖 in the *Names* group, select *Contacts* in *Watsonia_16* under *Look in*, then double-click on *Harry Jones*

5. Click on the drop arrow 🔽 for *Entry type* and select *Letter*

6. Click on the drop arrow 🔽 for *Start time* and select yesterday's date

7. Click in the large white box and type **Detailed letter sent outlining how to prepare tender documentation**

8. Click on *Save & Close* 💾 to return to the *Contact* window

**2**
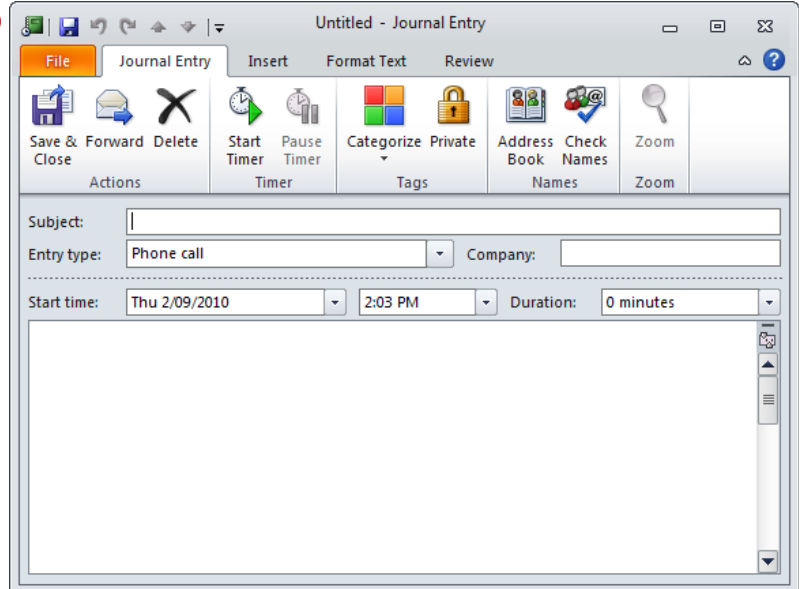
**7**

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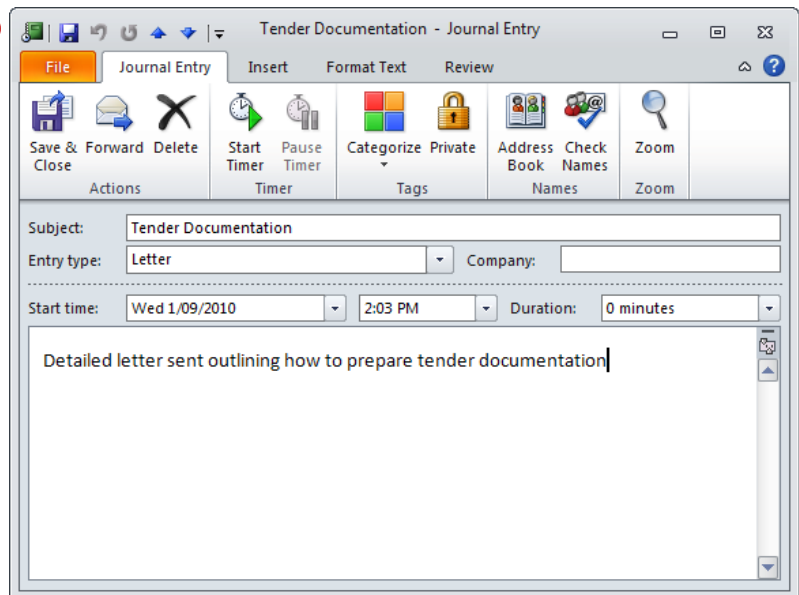
### For Your Reference…

To *manually record* an *encounter* with a contact:

1. Click on *New Items* 🖼️ and select **More Items** > **Journal Entry**
2. Select the contact in *Address Book* 📖
3. Nominate the *Subject*, *Entry type*, *Start time* and related text

### Handy to Know…

- You can create a new journal entry from an open Contact window by clicking on *More* 🖼️ in the *Communicate* group and selecting *Journal Entry*.

- When recording an encounter with a contact, you can type as much information in the white box as you like.

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# RECORDING TIMED ENCOUNTERS

Outlook allows you to record encounters that you have had with your contacts. Encounters can cover a broad range of activities from phone calls to writing letters. A nice feature here is the ability to use a timer to automatically record the duration of the encounter. This is particularly useful when recording the length of time spent with a contact either while writing a letter or talking on the phone.

## Try This Yourself:

*Same File*

*Continue using the previous file with this exercise...*

1. Click on **New Items** 📇▾ then select **More Items** > **Journal Entry** to open a **Journal Entry** window

2. Click on **Start Timer** 🕐 in the **Timer** group to start the timer – we'll let this run while we enter some details

3. Type **Tender Documentation** in **Subject**

4. Click on **Address Book** 📖 in the **Names** group, select **Contacts** in **Watsonia_16** under **Look in**, then double-click on **Harry Jones**

5. Click in the large white box and type **Spoke about Natural Reserve tender. Advised we should send three copies – no shortcuts with costs and prices.**

6. Click on **Pause Timer** 🕐 in the **Timer** group to stop the timer

   *Notice that the Duration has been recorded…*

7. Click on **Save & Close** 💾
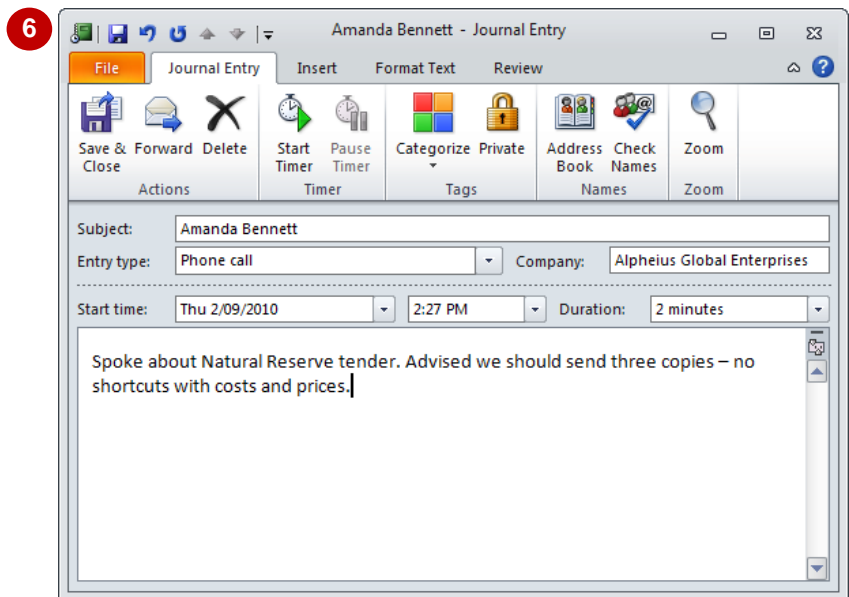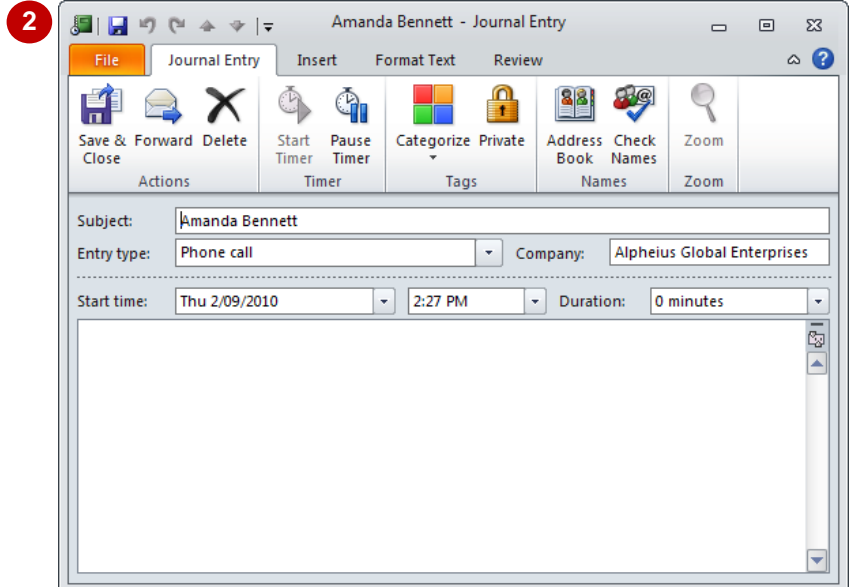
## For Your Reference…

To **time** an **encounter** with a **contact**:

1. Click on **New Items** 📇▾ and select **More Items** > **Journal Entry**
2. Click on **Start Timer** 🕐 in the **Timer** group
3. When finished click on **Pause Timer** 🕐
4. Complete the fields as desired

## Handy to Know…

- Being able to record the length of time spent with a contact is particularly useful if you charge clients for your time spent working for them by an hourly rate.

# REVIEWING CONTACT ENCOUNTERS

If you have either set up Outlook to automatically record encounters with specific contacts or you have manually recorded encounters by creating journal entries, you can review these encounters in the *Journal*. You can view the journal entries in a timeline or list, and using *Instant Search*, you can quickly narrow down the list to display only the desired entries.

## Try This Yourself:

*Same File*

*Continue using the previous file with this exercise...*

1. If the **[Journal]** button is not visible in the Navigation pane, click on **Configure buttons** ⌄ and select **Add or Remove Buttons** > **Journal**

   *The Configure buttons* ⌄ *is located in the bottom right corner of the Navigation pane…*
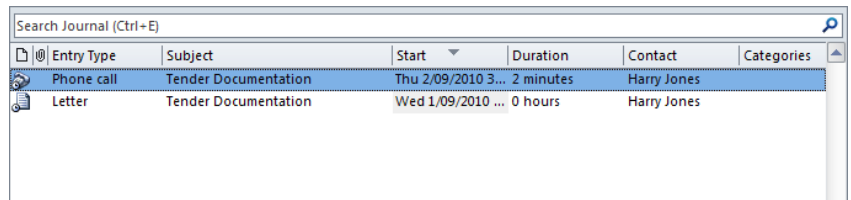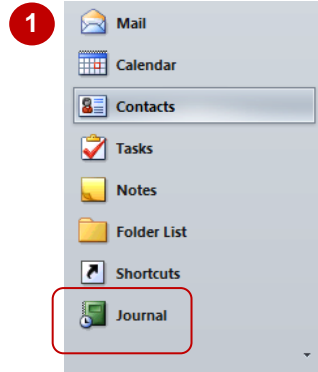
2. Click on **[Journal]**, then on **[No]** if a tracking message displays, to open the Journal

   *The two journal entries that you created in the last two exercises will appear...*

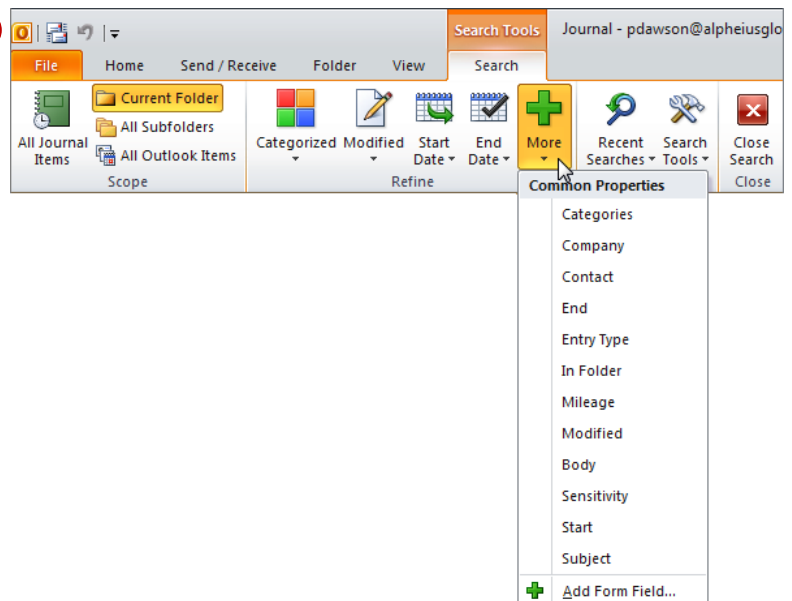3. Click on **Entry List** in the **Current View** gallery to see the details of the journal entries

4. Click in the **Instant Search** box, then click on **More** ✚⌄ in the **Refine** group to see the common properties that you can use for a search

5. Click on **Close Search** ⊠

**1**

- Mail
- Calendar
- Contacts
- Tasks
- Notes
- Folder List
- Shortcuts
- Journal

Search Journal (Ctrl+E)

| | Entry Type | Subject | Start ▼ | Duration | Contact | Categories |
|---|---|---|---|---|---|---|
| | Phone call | Tender Documentation | Thu 2/09/2010 3... | 2 minutes | Harry Jones | |
| | Letter | Tender Documentation | Wed 1/09/2010 ... | 0 hours | Harry Jones | |

**3**

**4**

Search Tools — Journal - pdawson@alpheiusglo

File | Home | Send / Receive | Folder | View | Search

All Journal Items | Current Folder | All Subfolders | All Outlook Items | Categorized | Modified | Start Date ⌄ | End Date ⌄ | More ⌄ | Recent Searches ⌄ | Search Tools ⌄ | Close Search

Scope — Refine — Close

**Common Properties**
- Categories
- Company
- Contact
- End
- Entry Type
- In Folder
- Mileage
- Modified
- Body
- Sensitivity
- Start
- Subject
- ✚ Add Form Field...

## For Your Reference…

To *review encounters* with *contacts*:

1. Click on **[Journal]**
2. Change the **Current View** as desired
3. Use **Instant Search** to search for the desired journal entries

## Handy to Know…

- The *Instant Search* feature in the Journal lets you find specific journal entries. For instance, you can find all entries for a contact, subject, journal entry type, and more.

- Double-click on a journal entry to see all of its details in the Journal window.

# NOTES: