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# Introduction

Part of the Microsoft Office 2013 suite of programs, Microsoft Outlook 2013 is a sophisticated communication-management program that helps you quickly and efficiently manage messages, schedules, address books, and other information. *Microsoft Outlook 2013 Step by Step* offers a comprehensive look at the features of Outlook that most people will use most frequently.

## Who this book is for

*Microsoft Outlook 2013 Step by Step* and other books in the *Step by Step* series are designed for beginning to intermediate-level computer users. Examples shown in the book generally pertain to small and medium-sized businesses but teach skills that can be used in organizations of any size. Whether you are already comfortable working in Outlook and want to learn about new features in Outlook 2013 or you are new to Outlook, this book provides invaluable hands-on experience so that you can manage communications and information with ease.

## How this book is organized

This book is divided into three parts. Part 1 explores the everyday experience of working in Outlook 2013. Part 2 discusses ways of managing content within Outlook to maximize your productivity. Part 3 delves into the management of Outlook itself, and ways of customizing program functionality and the appearance of the program window to fit the way you work. This three-part structure allows readers who are new to the program to acquire basic skills and then build on them, whereas readers who are comfortable with Outlook 2013 basics can focus on material that is of the most interest to them.

Chapter 1 contains introductory information that will primarily be of interest to readers who are new to Outlook or aren't familiar with the process of configuring Outlook to connect to an email account. If you are comfortable managing accounts in a recent version of Outlook, you might want to skip directly to Chapter 2.

This book has been designed to lead you step by step through all the tasks you're most likely to want to perform with Outlook 2013. If you start at the beginning and work your way through all the exercises, you will gain enough proficiency to be able to manage communications, contacts, tasks, and calendars. However, each topic is self-contained, so you can jump in anywhere to acquire exactly the skills you need.

## Download the practice files

Before you can complete the exercises in this book, you need to download the book's practice files to your computer. These practice files can be downloaded from the following page:

<http://aka.ms/Outlook2013sbs/files>

**IMPORTANT** The Outlook 2013 program is not available from this website. You should purchase and install that program before using this book.

As you work through the exercises in this book, you will create Outlook items that you will use as practice files in later exercises. If you do not complete the earlier exercises, you can substitute Outlook items of your own and modify the exercise settings to fit.

The following table lists the practice files for this book.

Chapter	Use these files and items	Create these files and items
Chapter 1: Get started with Outlook 2013	<i>No practice files required</i>	None
Chapter 2: Explore Outlook 2013	<i>No practice files required</i>	None
Chapter 3: Send and receive email messages	We provide: NaturalGardening.pptx Procedures.docx	SBS First Draft message series SBS Tradeshow Schedule message
Chapter 4: Store and access contact information	<i>No practice files required</i>	Contact records for Ben Miller, Dean Halstead, Jill Frank, Lola Jacobsen, and Sarah Jones

<b>Chapter</b>	<b>Use these files and items</b>	<b>Create these files and items</b>
Chapter 5: Manage scheduling	<i>No practice files required</i>	SBS Lunch with Jane appointment SBS Pay Day event SBS Staff Meeting appointment SBS Study Session meeting
Chapter 6: Track tasks	You provide: SBS First Draft message SBS Tradeshow Schedule message	Flagged SBS First Draft message Flagged SBS Tradeshow Schedule message SBS Make Dinner Reservations task SBS Order Brochures task SBS Send Dinner Invitations task
Chapter 7: Organize your Inbox	You provide: SBS First Draft message series SBS Tradeshow Schedule message	SBS Messages folder
Chapter 8: Manage your calendar	<i>No practice files required</i>	Secondary calendar
Chapter 9: Manage contact records	We provide: JoanLambert.jpg SBSContacts.csv  You provide: Contact records for Ben Miller, Dean Halstead, Jill Frank, Lola Jacobsen, and Sarah Jones	Contact records for Delphine Ribaute, Max Stevens, and Sara Davis SBS Contacts address book SBS Project Team contact group
Chapter 10: Enhance message content	We provide: Lighthouse.jpg	Casual email signature SBS Development Process message SBS Picture Tools message
Chapter 11: Customize Outlook	<i>No practice files required</i>	None
Chapter 12: Manage email settings	<i>No practice files required</i>	Flagged SBS Quick Message message SBS Messages folder SBS rule
Chapter 13: Work remotely	<i>No practice files required</i>	None

# Your companion ebook

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- Search the full text
- Print
- Copy and paste

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## Stay in touch

Let's keep the conversation going! We're on Twitter at: *<http://twitter.com/MicrosoftPress>*.

# Chapter at a glance

## Save

Save and update contact information, page 134

Full Name...	Joan Lambert	
Company	Wingtip Toys	
Job title	Chief Toy Tester	
File as	Lambert, Joan	
Internet		
E-mail...	joan@wingtip toys.com	
Display as	Joan Lambert (joan@wingtip toys.com)	
Web page address	www.wingtip toys.com	
IM address	joan@wingtip toys.com	
Phone numbers		
Business...	(940) 555-0140 x36	
Home...		
Business Fax...	(800) 555-0141	
Mobile...		

## Communicate

Communicate with contacts, page 146

More ▾

- Call
- Web Page
- Assign Task
- Map It

Business: (940) 555-0140 x36  
Business Fax: (940) 555-0141  
New Call...

## Display

Display different views of contact records, page 149

123	<b>Frank, Jill</b>	<b>Halstead, Dean</b>
a	<b>Jill Frank</b>	<b>Dean Halstead</b>
b	Fabrikam, Inc.	Fabrikam, Inc.
c	Sales Associate	Quality Control Manager
d		
e	jill@fabrikam.com	dean@fabrikam.com
f	www.fabrikam.com	www.fabrikam.com
g		
h		
i	<b>Jacobsen, Lola</b>	<b>Jones, Sarah</b>
k	<b>Lola Jacobsen</b>	<b>Sarah Jones</b>
l	Wingtip Toys	Wingtip Toys
m	Sales Associate	Creative Design Manager
n		
o	(940) 555-0140 Work	(940) 555-0140 Work
p	lola@wingtip toys.com	sarah@wingtip toys.com
q	315 Wingtip Way	315 Wingtip Way
r	Highflying, TX 71234	Highflying, TX 71234
	www.wingtip toys.com	111 Magnolia Lane
		Flower Hill, TX 71235

## Print

Print contact records, page 157

### Settings

- Card Style
- Small Booklet Style
- Medium Booklet Style
- Memo Style
- Phone Directory Style

**J**

**Jacobsen, Lola**

Full Name: Lola Jacobsen  
Job Title: Sales Associate  
Company: Wingtip Toys  
Company: Wingtip Toys  
Company: Wingtip Toys  
E-Mail: lola@wingtip toys.com  
E-Mail: lola@wingtip toys.com  
Web Page: www.wingtip toys.com

**Jones, Sarah**

Full Name: Sarah Jones  
Job Title: Creative Design Manager  
Company: Wingtip Toys  
Company: Wingtip Toys  
Company: Wingtip Toys  
E-Mail: sarah@wingtip toys.com  
E-Mail: sarah@wingtip toys.com  
Web Page: www.wingtip toys.com

**m**

**Miller, Ben**

Full Name: Ben Miller  
Job Title: Sales Associate  
Company: Fabrikam, Inc.  
Company: Fabrikam, Inc.  
Company: Fabrikam, Inc.  
E-Mail: ben@fabrikam.com  
E-Mail: ben@fabrikam.com  
Web Page: www.fabrikam.com

# Store and access contact information

## 4

IN THIS CHAPTER, YOU WILL LEARN HOW TO

- Save and update contact information.
- Communicate with contacts.
- Display different views of contact records.
- Print contact records.

Having immediate access to current, accurate contact information for the people you need to interact with—by email, phone, mail, or otherwise—is important for timely and effective communication. You can easily build and maintain a detailed contact list, or address book, in the Microsoft Outlook 2013 People module. From your address book, you can look up information, create messages, and share contact information with other people. You can also keep track of your interactions with a person whose contact information is stored in Outlook.

If you need to take contact information with you in a non-electronic format, you can print an address book or selected contact records, in many different formats.

In this chapter, you'll create and edit contact records and view them in different ways. Then you'll discover how to initiate communications with people from contact records or from an address book. Finally, you'll print a contact record and a list of contact information.

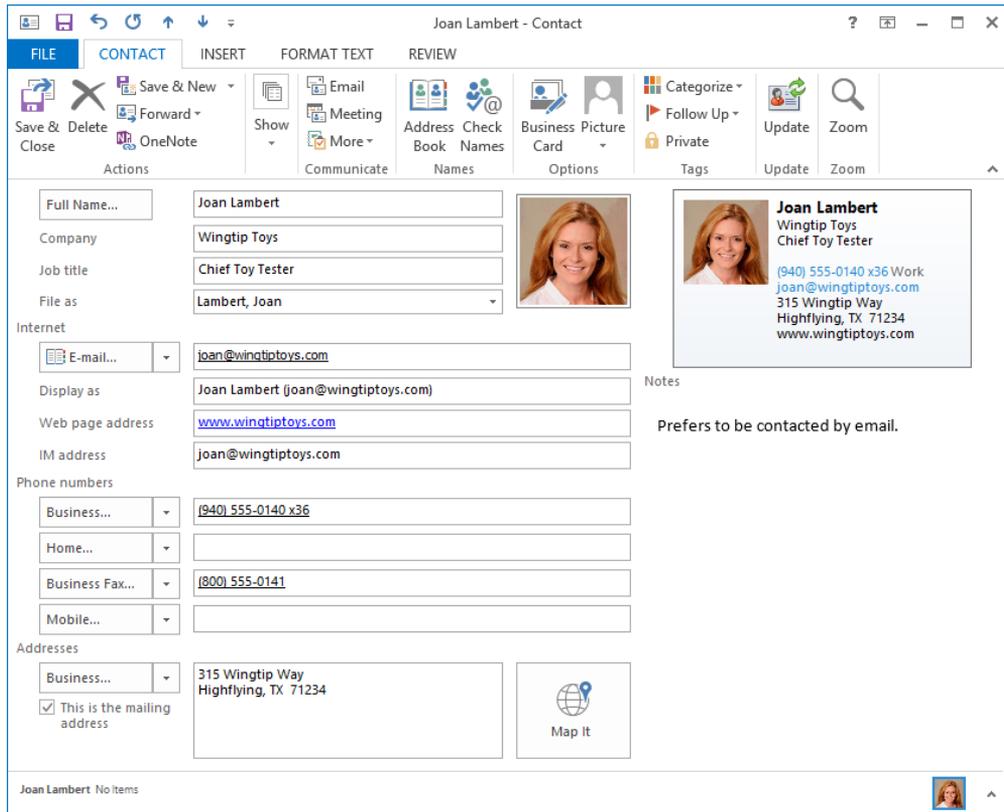
---

**PRACTICE FILES** You don't need any practice files to complete the exercises in this chapter.

---

# Saving and updating contact information

You save contact information for people and companies by creating a contact record in an address book.



The screenshot shows a Microsoft Outlook contact record for Joan Lambert. The window title is "Joan Lambert - Contact". The ribbon includes FILE, CONTACT, INSERT, FORMAT TEXT, and REVIEW. The CONTACT ribbon has several groups: Actions (Save & New, Save & Delete, Forward, OneNote), Communicate (Email, Meeting, More), Names (Address Book, Check Names), Options (Business Card, Picture), Tags (Categorize, Follow Up, Private), and Update/Zoom. The contact information is organized into sections: Full Name (Joan Lambert), Company (Wingtip Toys), Job title (Chief Toy Tester), File as (Lambert, Joan), Internet (E-mail: joan@wingtip toys.com, Display as: Joan Lambert (joan@wingtip toys.com), Web page address: www.wingtip toys.com, IM address: joan@wingtip toys.com), Phone numbers (Business: (940) 555-0140 x36, Home, Business Fax: (800) 555-0141, Mobile), and Addresses (Business: 315 Wingtip Way, Highflying, TX 71234, with a checked box for "This is the mailing address" and a "Map it" button). A business card preview is shown on the right, and a notes field contains the text "Prefers to be contacted by email." The status bar at the bottom left shows "Joan Lambert No Items" and a small profile picture on the right.

*A typical contact record for a business contact.*

**TIP** You can create a personalized electronic business card for yourself or for any of your contacts. For information, see “Personalizing electronic business cards” in Chapter 9, “Manage contact records.”

On the General page of a contact record, you can store the following types of contact information:

- Name, company name, and job title
- Business, home, and alternate addresses
- Business, home, mobile, pager, and other phone numbers
- Business, home, and alternate fax numbers
- Webpage address (URL), instant messaging (IM) address, and up to three email addresses

**TIP** If you need to store more than three email addresses for a contact, you can do so by creating a custom contact record form.

- Photo, company logo, or other identifying image
- General notes, which can include text and illustrations such as photos, clip art images, SmartArt diagrams, charts, and shapes

On the Details page of a contact record, you can store personal and organization-specific details, such as the following:

- Professional information, including department, office location, profession, manager's name, and assistant's name
- Personal information, including nickname, spouse or partner's name, birthday, anniversary, and the title (such as Miss, Mrs., or Ms.) and suffix (such as Jr. or Sr.) for use in correspondence

## Creating contact records

You typically create a contact record by displaying the address book to which you want to add the contact record in the People module and then clicking the New Contact button in the New group on the Home tab. In the contact record window that opens, you insert the information you want to save. After you save the contact record, it appears in the contact list.

You can create a contact record that contains only one piece of information (for example, a name or company name), or as much information as you want to include. You can quickly create contact records for several people who work for the same company by cloning the company information from an existing record to a new one. And of course, you can add to or change the information stored in a contact record at any time.

The order in which Outlook displays contact records in the contact list is controlled by the File As setting. By default, Outlook files contacts by last name (Last, First order). If you prefer, you can change the order for new contacts to any of the following:

- First Last
- Company
- Last, First (Company)
- Company (Last, First)

To set the filing order for all your contacts, display the People page of the Outlook Options dialog box, click the Default “File As” Order arrow and select an order from the list. You can change the filing order for an individual contact by selecting the order you want in the File As list in the contact record.

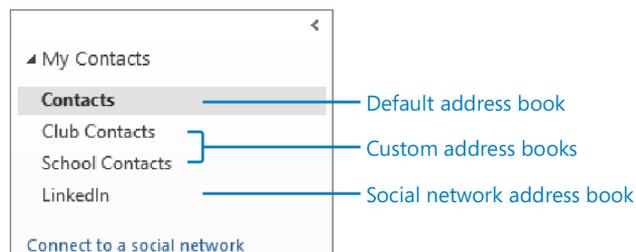
**TIP** In addition to creating individual contact records, you can create groups of contacts so that you can manage messaging to multiple people through one email address. For information, see “Creating contact groups” in Chapter 9, “Manage contact records.”

## Address books

Outlook stores contact information from different sources in separate address books. Some are created by Outlook, some by your email server administrator, and others by you.

### Contacts address books

Outlook creates a Contacts address book for each account you connect to. These address books are available from the My Contacts list in the Folder Pane of the People module.



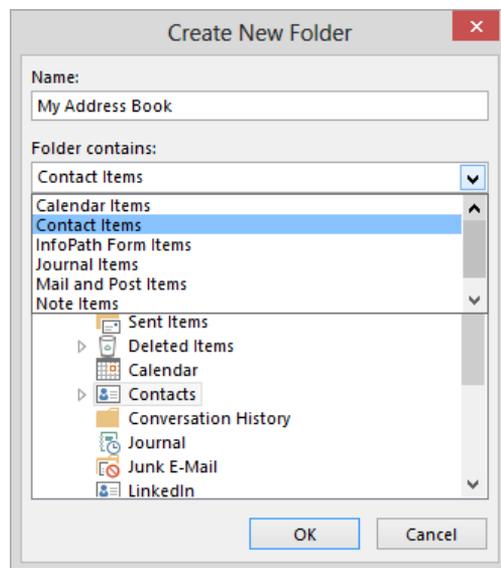
*The Folder Pane of the People module displays a list of all your address books.*

The Contacts address book of your default email account is your main address book, and it is the address book that appears by default in the People module. The Contacts address book is empty until you add contact records to it.

## Custom address books

You can create address books in addition to those associated with email accounts; for example, you might want to keep contact information for family and friends in an address book separate from client contact information, or you might maintain an address book for clients that meet specific criteria.

You create an address book by creating a folder and specifying that the folder will contain contact items.



*An address book is a folder designed specifically to contain contact records and contact groups.*

When you display the Folder List in the Folder Pane, your custom address books appear along with other folders you create, and you can organize them in the same manner—for example, at the same level as your Inbox, as a subfolder of the Contacts address book, or inside a project folder. All address books are available from the My Contacts list in the Folder Pane of the People module.

**SEE ALSO** For information about creating address books, see “Organizing messages in folders” in Chapter 7, “Organize your Inbox.”

**TIP** If your organization stores contact information in a SharePoint contact list, you can import the list contents from SharePoint into Outlook as an address book. For more information, see “Working with SharePoint site content” in Chapter 13, “Work remotely.”

## Global Address Lists

If you have a Microsoft Exchange Server account, you also have access to an official address book called the Global Address List (or *GAL*). The GAL is maintained by your organization's Exchange administrator and includes information about individuals within your organization, distribution lists, and resources (such as conference rooms and media equipment) that you can reserve when you schedule meetings. It can also include organizational information (each person's manager and direct subordinates) and group membership information (the distribution lists each person belongs to).

The GAL doesn't appear in the My Contacts list shown in the Folder Pane of the People module. To display the GAL, click the Address Book button in the Find group on the Home tab of the People module or the Address Book button in the Names group on the Message tab of a message composition window. Outlook users can view the GAL but not change its contents. Only an Exchange administrator can modify the GAL.

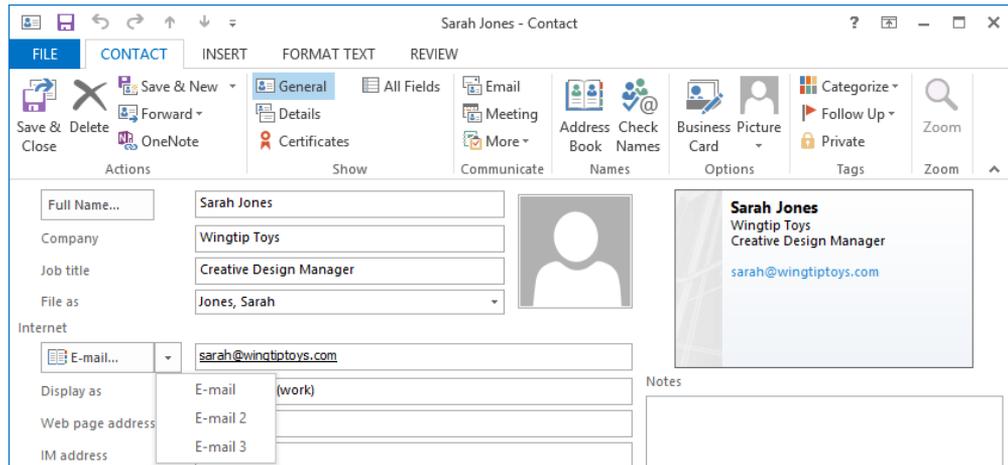
In this exercise, you'll create and edit a contact record in your main address book.



**SET UP** You don't need any practice files to complete this exercise. Display the People module, and then follow the steps.

- 1 On the **Home** tab, in the **New** group, click the **New Contact** button to open a new contact record window.
- 2 In the **Full Name** box, enter **Sarah Jones**, and then press the **Tab** key to move the cursor to the **Company** box. Notice that Outlook transfers the name to the **File as** box, and displays it in the default order (**Last, First**). The name also appears on the contact record window title bar and in the business card representation.  
**SEE ALSO** For information about changing the default order, see "Configuring Office and Outlook options" in Chapter 11, "Customize Outlook."
- 3 In the **Company** box, enter **Wingtip Toys**.
- 4 In the **Job title** box, enter **Creative Design Manager**.
- 5 In the **Internet** area of the form, enter **sarah@wingtip toys.com** in the **E-mail** box, and press **Tab**. Notice that Outlook formats the email address as a hyperlink and enters the name and email address in the **Display as** box. This box indicates the way the contact will appear in the headers of email messages you exchange with this contact.

- 6 In the **Display as** box, select the email address inside the parentheses and replace it with the designator **work**.
- 7 Click the **E-mail** arrow (not the button) to display a list of the email address fields available in the contact record.



*Groups of related contact information fields are indicated by an arrow button to the right of the field name.*

- 8 In the **E-mail** list, click **E-mail 2** to change the displayed email address and display name.
- 9 In the **E-mail 2** field, enter **sarah@thephone-company.com**, and then press **Tab** to populate the **Display as** field with information for this email address. Although the field name doesn't change to indicate it, this information is specific to the **E-mail 2** field.
- 10 In the **Display as** box, select the email address inside the parentheses and then enter **personal**. Notice that the business card representation in the upper-right corner of the contact card displays both email addresses, but not their labels.
- 11 In the **Web page address** box, enter **www.wingtip toys.com**. Outlook formats the URL as a hyperlink.
- 12 In the **Phone numbers** section of the form, enter **9405550140** in the **Business** box, and then press **Tab**. Notice that Outlook formats the string of numbers in standard telephone number format.
- 13 In the **Addresses** area, click in the text box to the right of **Business**, enter **315 Wingtip Way**, press the **Enter** key, and then enter **Highflying, TX 71234**.

**TIP** In a new contact record, a selected check box to the left of the Business address field indicates that it is the default mailing address for the contact.

- 14 Click the **Business** arrow to display the list of address labels, and then click **Home** to indicate the address information you want to enter.
- 15 In the text box, enter **111 Magnolia Lane**, press **Enter**, and then enter **Flower Hill, TX 71235**. The contact record now contains both business and personal contact information.

**TIP** If you enter multiple addresses for a contact and want to specify one as the default mailing address, display that address and then select the This Is The Mailing Address check box.

**SEE ALSO** For information about adding an image to a contact record, see “Personalizing electronic business cards” in Chapter 9, “Manage contact records.”

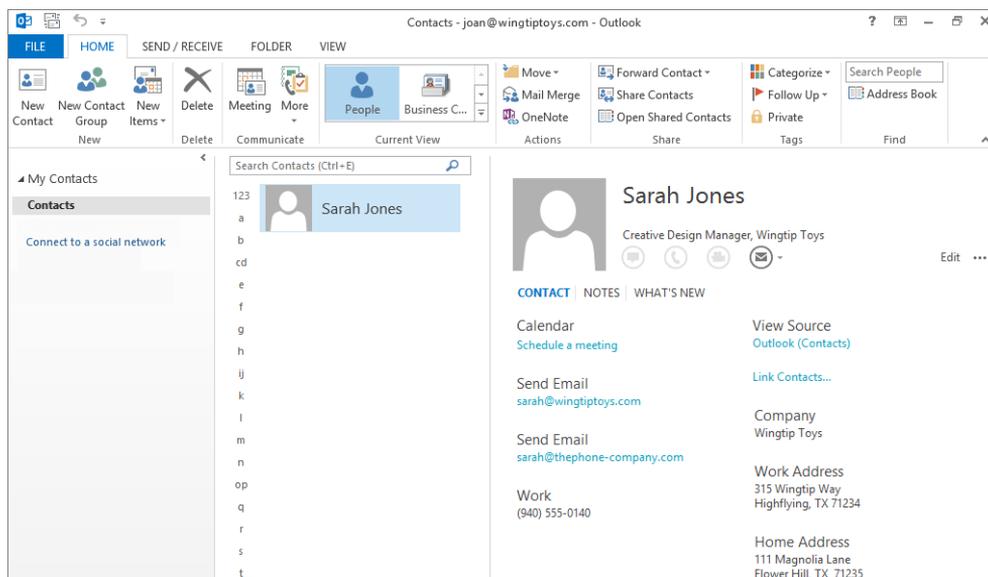
The screenshot shows the 'Sarah Jones - Contact' window in Microsoft Office. The ribbon includes FILE, CONTACT, INSERT, FORMAT TEXT, and REVIEW. The CONTACT ribbon has several groups: Actions (Save & Delete, Save & New, Forward, OneNote), Communicate (Email, Meeting, More), Names (Address Book, Check Names), Options (Business Picture Card), Tags (Categorize, Follow Up, Private), and Update (Update, Zoom). The contact form is filled with the following information:

- Full Name: Sarah Jones
- Company: Wingtip Toys
- Job title: Creative Design Manager
- File as: Jones, Sarah
- Internet: E-mail 2...: sarah@thephone-company.com
- Display as: Sarah Jones (personal)
- Web page address: www.wingtip toys.com
- IM address: (empty)
- Phone numbers: Business...: (940) 555-0140; Home...: (empty); Business Fax...: (empty); Mobile...: (empty)
- Addresses: Home...: 111 Magnolia Lane, Flower Hill, TX 71235. The checkbox 'This is the mailing address' is unchecked.

On the right, there is a business card preview for Sarah Jones, Wingtip Toys Creative Design Manager, with contact details: (940) 555-0140 Work, sarah@wingtip toys.com, sarah@thephone-company.com, 315 Wingtip Way, Highflying, TX 71234, www.wingtip toys.com. Below the card is a 'Notes' field. At the bottom, there is a 'Map it' button and a status bar showing 'Sarah Jones (work) No Items'.

*The completed contact record.*

- 16 On the **Contact** tab, in the **Actions** group, click the **Save & Close** button to close the contact record window. The contact list now includes the new contact record for Sarah Jones, shown in the default **People** view.



*A People card view of the new contact record is visible in the contact list.*

- 17 In the contact list, double-click the entry for **Sarah Jones** to open the **People** card that contains her information. This card format is new in Outlook 2013; it cleanly displays the available information exactly as it appears in the Reading Pane.

**TIP** You can assign follow-up flags to contact entries, and link contact entries to email messages, appointments, tasks, and other Outlook items. For more information, see “Creating tasks” in Chapter 6, “Track tasks.” You can open a contact record in the original multipage contact record window by first displaying the People module in a view other than People view, and then double-clicking the contact record. You can view all items linked to a contact on the Activities page of the contact record window.

- 18 In the **Reading Pane**, click **Edit**, and then scroll to the bottom of the pane.

**TIP** You can edit a contact record directly in the Reading Pane or you can open it in a separate window by double-clicking it in the contact list.

Name  
Sarah Jones

**CONTACT** | NOTES

+ Email  
Email  
sarah@wingtip toys.com  
Outlook (Contacts)

Changes Saved To  
Outlook (Contacts)

+ Work  
Title  
Creative Design Manager  
Company  
Wingtip Toys

+ Phone  
Work  
(940) 555-0140

+ IM

+ Address  
Work Address  
315 Wingtip Way  
Highflying, TX 71234  
Home Address  
111 Magnolia Lane  
Flower Hill, TX 71235

+ Birthday

Save Cancel

*When editing a People card, you have fewer options than when editing a standard contact record.*

- 19 Click the plus sign to the left of **Birthday**, click the **Birthday** arrow, scroll the calendar to **January**, and then click **23** to display January 23 of the current year in the **Birthday** box.

**TIP** The birthday or anniversary date you select in the calendar defaults to the current calendar year.

- 20 In the **Birthdate** box, replace the current year with **1979**.
- 21 In the lower-right corner of the **Reading Pane**, click the **Save** button.
- 22 In the contact list, click the **Sarah Jones** contact record. On the **Home** tab, in the **New** group, click the **New Items** button, and then click **Contact from the Same Company** to create a new contact record that already contains the company name, webpage address, business phone number, and business address from the **Sarah Jones** contact record. Because no person's name has been provided, the **File as** name is currently set to the company name.

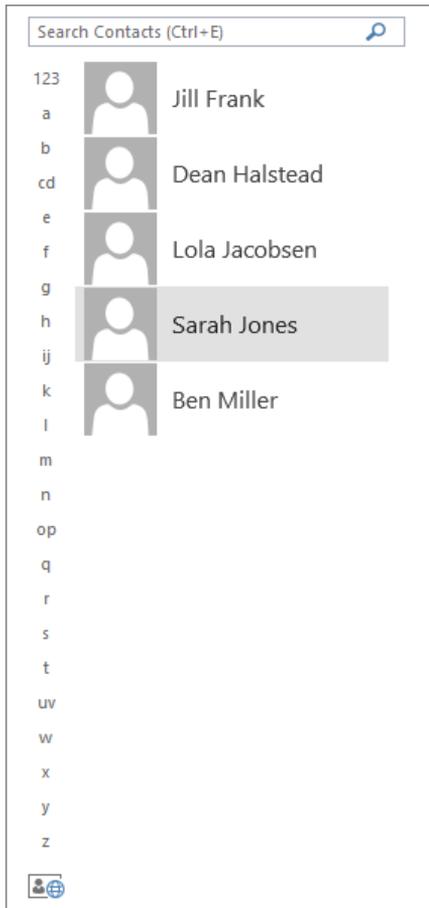
The screenshot shows the Microsoft Outlook 'Wingtip Toys - Contact' form. The ribbon includes FILE, CONTACT, INSERT, FORMAT TEXT, and REVIEW. The CONTACT ribbon has groups for Actions, Show, Communicate, Names, Options, Tags, and Zoom. The form fields are: Full Name (empty), Company (Wingtip Toys), Job title (empty), File as (Wingtip Toys), Internet (E-mail... empty, Display as empty, Web page address: [www.wingtip toys.com](http://www.wingtip toys.com), IM address empty), Phone numbers (Business...: (940) 555-0140, Home... empty, Business Fax... empty, Mobile... empty), Addresses (Business...: 315 Wingtip Way Highflying, TX 71234, This is the mailing address checked). A preview card on the right shows 'Wingtip Toys' with phone number, address, and website. A 'Map It' button is at the bottom right.

*Without any changes, the new contact record could be saved as a contact record for the company rather than for a specific person.*

- 23 In the **Full Name** box, enter **Lola Jacobsen**, and in the **Job title** box, enter **Sales Associate**.
- 24 In the **E-mail** box, enter **lola@wingtiptoys.com**. Leave the default **Display as text**.
- 25 Save and close the open contact record.
- 26 Create a new contact record and enter the following information:
- Full name: **Ben Miller**
  - Company: **Fabrikam, Inc.**
  - Job title: **Manufacturing Manager**
  - Email address: **ben@fabrikam.com**
  - Webpage address: **www.fabrikam.com**
- 27 After you enter the contact information, click the **Save & New** arrow (not the button) in the **Actions** group on the **Home** tab, and then click **Contact from the Same Company** to create a new contact record for Fabrikam, Inc.
- 28 Populate this contact record and create one more, to create contact records for the following people:

Full name	Company	Job title	Email address
Dean Halstead	Fabrikam, Inc.	Quality Control Manager	dean@fabrikam.com
Jill Frank	Fabrikam, Inc.	Sales Associate	jill@fabrikam.com

- 29 Save and close the open contact records. The contact list now includes the five records you've created. Notice that the contact records appear in **File as** (last, first) order rather than in order by first name, even though the first name appears first in the contact list.



*If an address book contains a lot of records, you can quickly scroll to those filed by a specific letter by clicking that letter in the contact index.*



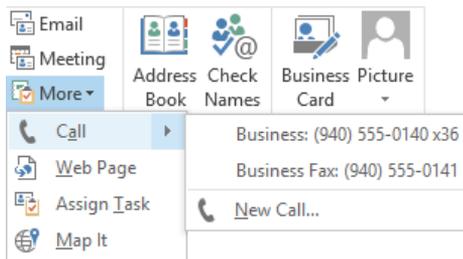
**CLEAN UP** Save and close any open contact records to return to the contact list. Retain the Jill Frank, Dean Halstead, Lola Jacobsen, Sarah Jones, and Ben Miller contact records for use in later exercises.

# Communicating with contacts

Saving contact information for people in a physical or an electronic address book is useful because it centralizes the information in one place so that you no longer have to remember the information or where to find it. The added benefit of saving contact information in an Outlook address book is that it makes the process of initiating communication with a contact much more efficient.

## Initiating communication from contact records

Contact records are useful not only for storing information; you can also initiate a number of actions that are specific to a selected contact. Commands for initiating communication are available in the Communicate group on the Contact tab of an open contact record or in the header of a People card.



*The commands available in the Communicate group may vary based on your specific Outlook configuration.*

You can perform many actions from within a contact record window (but not in a People card) by using the commands in the Communicate group on the Contact tab, including the following:

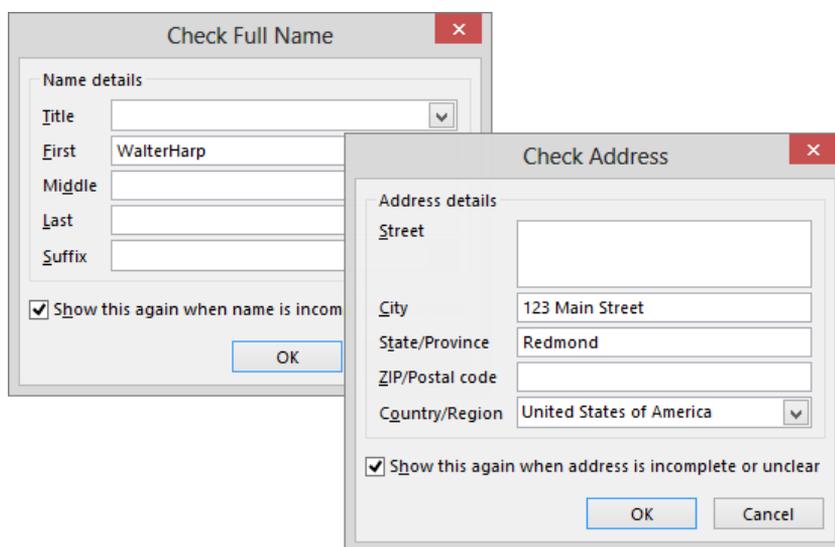
- Create an email message addressed to the contact by clicking the Email button.
- Create a meeting request that includes the contact by clicking the Meeting button.
- Initiate a chat session with the contact by clicking the Reply With IM button (if it is available in your organization's environment).
- Place a call to the contact by clicking the Call arrow and then, in the list, clicking the phone number you would like Outlook to dial (requires unified communications).
- Display the contact's website by clicking the Web Page button.

- Create a task assigned to the contact by clicking the Assign Task button.
- Display a map of the contact's address by clicking the Map It button.

If Microsoft OneNote 2013 is installed on your computer, you can create a OneNote notebook entry that is linked to the contact record by clicking the OneNote button in the Actions group on the Contact tab.

## Conforming to address standards

When you enter information in a contact record, Outlook verifies that the information conforms to expected patterns. If Outlook detects possible irregularities, a related dialog box opens, prompting you to enter information into a standard template.



*The Check Full Name and Check Address dialog boxes fit contact information into standard patterns.*

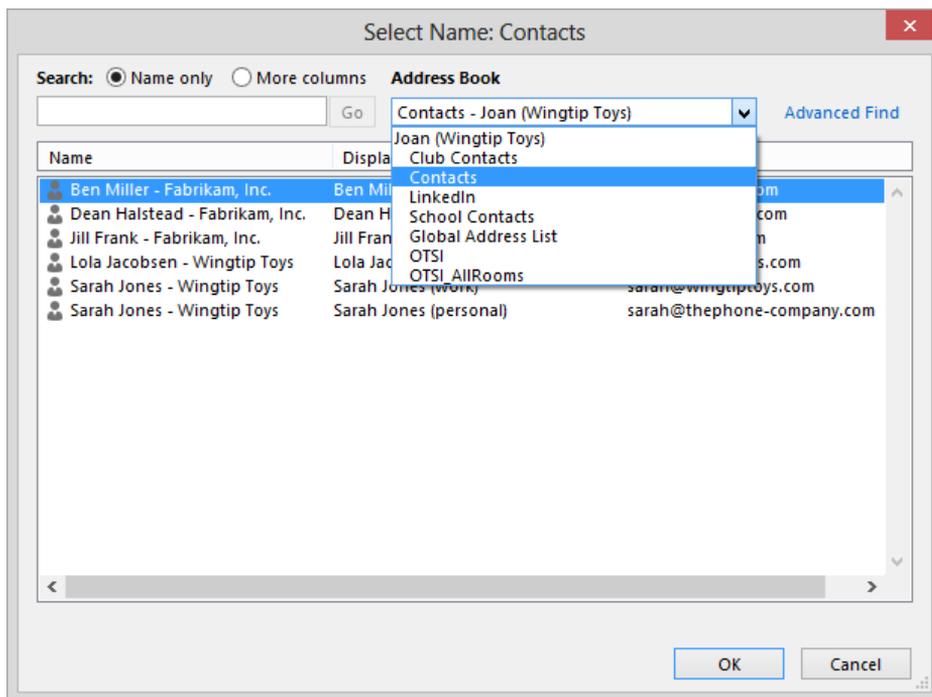
The intention of these dialog boxes is to verify that you have usable contact information available. If you determine that the information in the dialog box is correct as-is, you can click Cancel to close the dialog box without making changes.

**TIP** You can create a contact record for the sender of a message you have received by right-clicking the sender's name in the message header—either in the Reading Pane or the open message item—and then clicking Add To Outlook Contacts. Outlook creates a contact record with the name and email address already filled in. Add any other information you want to record, and then save the contact record.

## Selecting message recipients from address books

When you send an email message to a person whose contact information is stored in one of your address books, you can quickly address the message to that person by entering his or her name exactly as it appears in the address book and letting Outlook validate the address. If you don't know the exact spelling of the name, follow these steps:

- 1 In the message composition window, click the **Address Book** button in the **Names** group on the **Message** tab to open the **Select Name** dialog box.
- 2 In the **Address Book** list, click the arrow, and then click the address book you want to search.



*To insert names from an address book, you must open the address book from the message composition window.*

- 3 Scroll through the **Name** list, and locate the person's name. If you have multiple email addresses saved for that person, the name will appear once for each email address.  
**TIP** You can enter the first few letters of the person's name to scroll to entries beginning with those letters.
- 4 To add the person in the **To** box as a primary message recipient, double-click the name, or click it and then press **Enter**. To add the person as a secondary or private recipient, click in the **Cc** or **Bcc** box at the bottom of the dialog box and then double-click the name, or click it and press **Enter**.  
**TIP** If you click the **To**, **Cc**, or **Bcc** box in the message header before clicking the **Address Book** button, double-clicking the name adds the person to that box. You can also click the **Cc** or **Bcc** box and then click the adjacent button to open the **Select Names** dialog box with that box active.
- 5 After selecting all message recipients from the address book, click **OK** to close the **Select Names** dialog box and return to the message composition window.

**SEE ALSO** For information about creating email messages, see "Creating and sending messages" in Chapter 3, "Send and receive email messages."

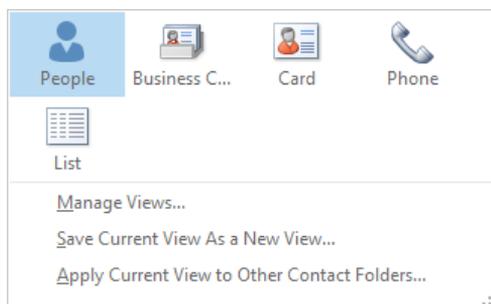
## Displaying different views of contact records

You can view all your address books in the People module. You can also display a list of the contacts in an address book, including those in your organization's Global Address List, in one of these ways:

- Click the **Address Book** button in the **Find** group on the **Home** tab of the program window in any module to open the **Address Book** window.
- Click the **Address Book** button in the **Names** group on the **Contact** tab of a contact record window to open the **Select Name** dialog box.

Expand the Address Book list, and then click the name of the address book whose contents you want to display.

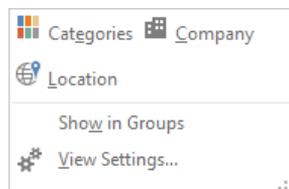
In the People module, you can view an address book in many different formats. You can choose any standard view from the Current View gallery on the Home tab.



*The standard view options for the People module.*

Each view presents information from your contact records either as cards or in a list:

- **People** Displays only contact names in the contact list, and the available information for the selected contact in the Reading Pane. Contact names are displayed in alphabetical order by first or last name, depending on the File As selection. This view displays information about the contact from multiple sources. For example, if you have an Outlook contact record for a person you network with on LinkedIn and Facebook, the People card displays a compilation of the information from all three locations. This view, which is new in Outlook 2013, is the default view.
- **Business Card** Displays the business card associated with each contact record—either the default card created by Outlook or a custom card if you have one. Business cards are displayed in the alphabetical order specified by the File As selection.
- **Card** Displays contact information as truncated business cards that include limited information, such as job title and company name.
- **Phone** Displays a columnar list that includes each contact's name, company, and contact numbers. You can choose the grouping you want from the Arrangements gallery on the View tab.



*Buttons in the gallery on the Arrangements menu of the People module are available only while contact records are displayed in a list view.*

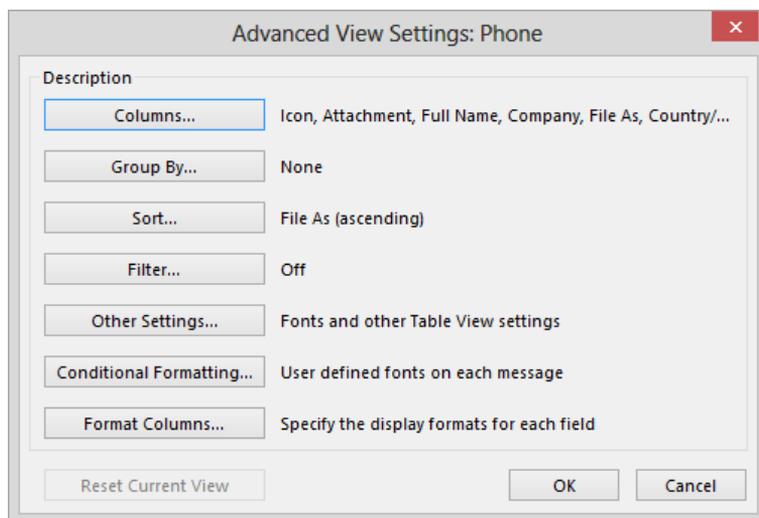
- **List** Displays a columnar list with contact records arranged in groups. You can choose the grouping you want from the Arrangements gallery on the View tab.

In any list view, you can expand and collapse the groups or select and take action on an entire group of contacts. You can also enter information directly into any contact record field displayed in the list.

You can search and filter your contact records in any view by using the Instant Search feature from the search box at the top of the content area. You can sort contact records by any displayed column in a list view by clicking the column header.

**KEYBOARD SHORTCUT** Press **Ctrl+E** to move to the search box in the active module. For more information about keyboard shortcuts, see “Keyboard shortcuts” at the end of this book.

You can change the fields displayed in each view; the way records are grouped, sorted, and filtered; the display font; the size of business cards; and other settings to suit your preferences. You can personalize a view from the Advanced View Settings dialog box, which you open by clicking View Settings in the Current View group on the View tab.



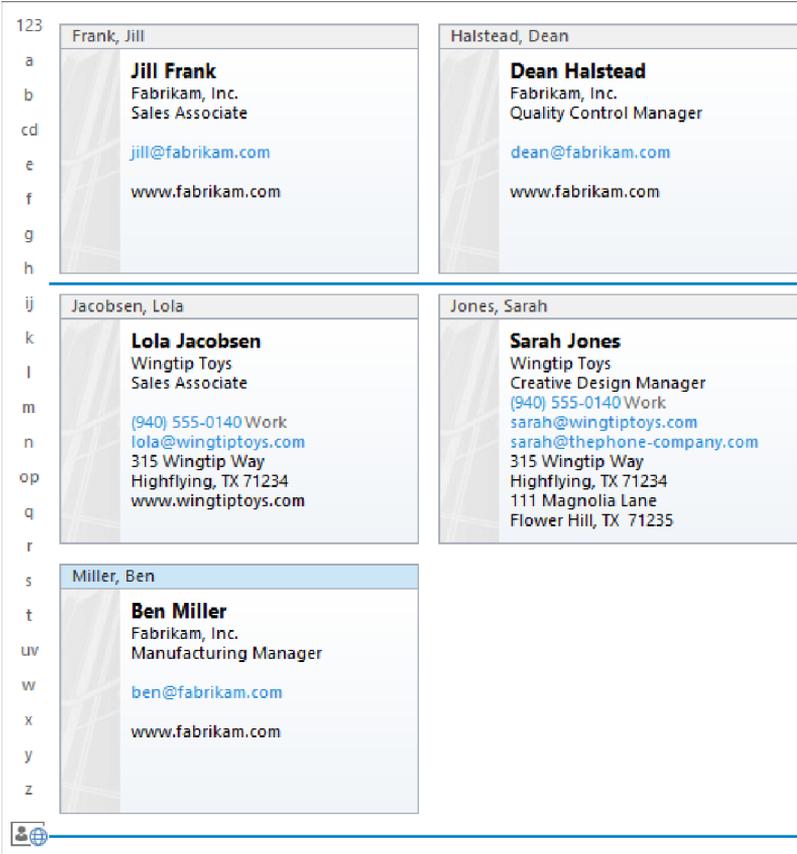
*The options available in the Advanced View Settings dialog box vary depending on the currently displayed view.*

**TIP** From the Advanced View Settings dialog box, you can undo your changes to the currently displayed view by clicking the Reset Current View button, which is available only when the default settings for the view have been changed.

In this exercise, you'll look at different views of contact records within the contact list, add and remove columns in a list view, and reset a customized view.

 **SET UP** This exercise uses the contact records you created in the exercise “Saving and updating contact information,” earlier in this chapter. If you didn’t complete that exercise, you can do so at this time or use contact records of your own. Display the People module, and then follow the steps.

- 1 On the **Home** tab, in the **Current View** gallery, click the **Business Card** button to display standard business cards for each contact (in addition to any personalized business cards you may have created). The cards are organized by **File as** name.
- 2 On the contact index located to the right of the contact list, click the letter **m** to scroll the contact list to the business card for **Ben Miller** (or the first contact record in your **People** module that is filed under **m**).

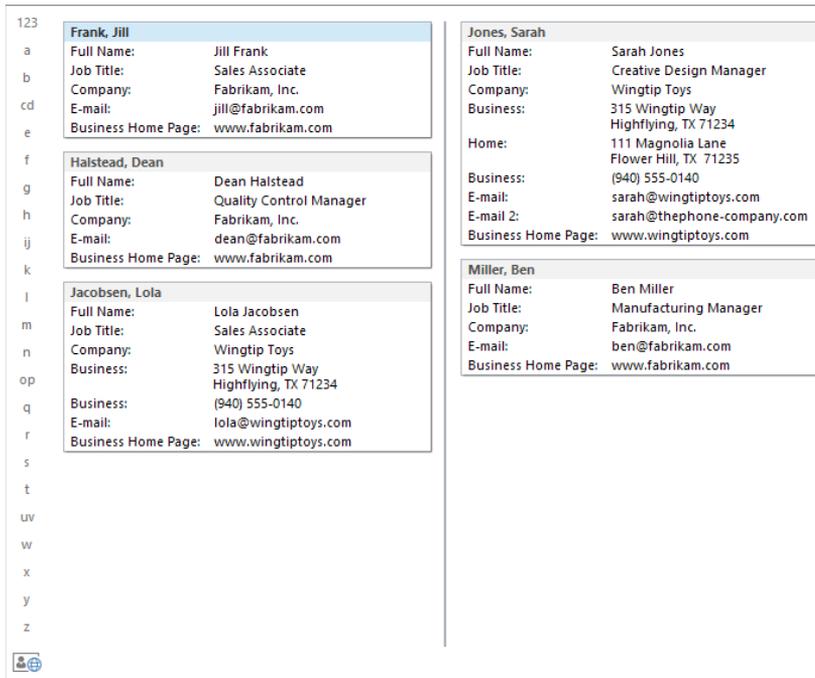


The screenshot shows a contact list in a business card view. The list is organized by 'File as' name. The visible cards are for Jill Frank, Dean Halstead, Lola Jacobsen, Sarah Jones, and Ben Miller. A 'Contact index' is visible on the right side of the list, and a 'Language Settings' icon is at the bottom right.

File as	Name	Company	Job Title	Email	Website
Frank, Jill	Jill Frank	Fabrikam, Inc.	Sales Associate	jill@fabrikam.com	www.fabrikam.com
Halstead, Dean	Dean Halstead	Fabrikam, Inc.	Quality Control Manager	dean@fabrikam.com	www.fabrikam.com
Jacobsen, Lola	Lola Jacobsen	Wingtip Toys	Sales Associate	(940) 555-0140 Work lola@wingtip toys.com	315 Wingtip Way Highflying, TX 71234 www.wingtip toys.com
Jones, Sarah	Sarah Jones	Wingtip Toys	Creative Design Manager	(940) 555-0140 Work sarah@wingtip toys.com sarah@thephone-company.com	315 Wingtip Way Highflying, TX 71234 111 Magnolia Lane Flower Hill, TX 71235
Miller, Ben	Ben Miller	Fabrikam, Inc.	Manufacturing Manager	ben@fabrikam.com	www.fabrikam.com

When you have many contact records, you can scroll them by using the contact index.

- 3 In the **Current View** gallery, click the **Card** button.
- 4 If the card columns are not wide enough to display the information saved with the contact records, click the **Zoom In** button at the right end of the status bar until the information is visible. Notice that Outlook displays the contact records in a compact card-like format that includes only text and no additional graphic elements.



*Card view displays all the available primary contact information.*

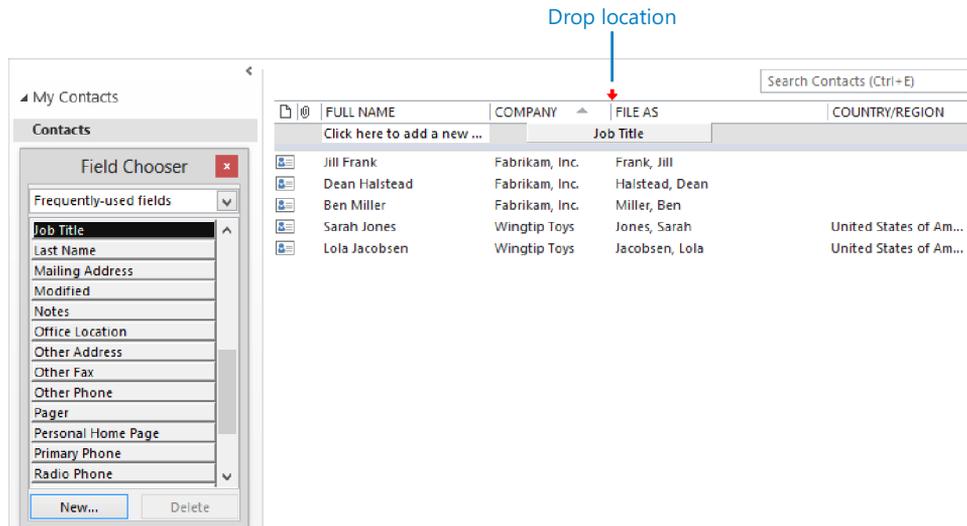
- 5 In the **Current View** gallery, click the **Phone** button to display your contact records in a grid of columns and rows organized in ascending order based on the **File as** column.
- 6 Click the **Full Name** column heading to sort the contact records in ascending order based on the **Full Name** field, as indicated by the upward-pointing sort arrow to the right of the column heading. You can reverse the sort order by clicking the active heading again.

	FULL NAME ▲	COMPANY	FILE AS	COUNTRY/REGION	BUSINESS PHONE	BUSINESS FAX
Click here to add a new ...						
	Ben Miller	Fabrikam, Inc.	Miller, Ben			
	Dean Halstead	Fabrikam, Inc.	Halstead, Dean			
	Jill Frank	Fabrikam, Inc.	Frank, Jill			
	Lola Jacobsen	Wingtip Toys	Jacobsen, Lola	United States of Am...	(940) 555-0140	
	Sarah Jones	Wingtip Toys	Jones, Sarah	United States of Am...	(940) 555-0140	

*Click any column header to sort by that column or to reverse the sort order.*

**TIP** You can add a contact to your address book in any list view by clicking the box under the Full Name header (labeled Click Here To Add A New Contact) and entering the contact's information.

- 7 Click the **Company** column heading to sort the contact records in ascending order based on the **Company** field.
- 8 Right-click the **Company** column header, and then click **Field Chooser** to open the **Field Chooser** window.
- 9 Scroll down the field list until the **Job Title** field is visible. Drag the **Job Title** field from the **Field Chooser** window to the column heading area, and when the red arrows indicate that it will be inserted between the **Company** and **File as** fields, release the mouse button. Notice that the list view now includes a column that displays the **Job Title** for each contact.



*You can add any field to a list view from the Field Chooser.*

- 10 Point to the column separator between **Job Title** and **File as**. When the cursor changes to a double-headed arrow, double-click to change the column width to accommodate its contents.
- 11 Drag the **Country/Region** column header down from the column heading row until a black X appears. Then release the mouse button to remove the **Country/Region** column from the list view.

	FULL NAME	COMPANY	JOB TITLE	FILE AS	COUNTRY/REGION	BUSINESS
	Click here to add a new ...					
	Jill Frank	Fabrikam, Inc.	Sales Associate	Frank, Jill		
	Dean Halstead	Fabrikam, Inc.	Quality Control Manager	Halstead, Dean		
	Ben Miller	Fabrikam, Inc.	Manufacturing Manager	Miller, Ben		
	Sarah Jones	Wingtip Toys	Creative Design Manager	Jones, Sarah	United States of Am...	(940) 555-0
	Lola Jacobsen	Wingtip Toys	Sales Associate	Jacobsen, Lola	United States of Am...	(940) 555-0

You can remove a column from a list view by dragging its column header away from the column header row.

- 12 On the **View** tab, in the **Current View** group, click the **Reset View** button. Then in the **Microsoft Outlook** dialog box that asks whether you want to reset the view to its original settings, click **Yes** to return the **Phone** view to its original settings.
- 13 Close the **Field Chooser** window. Then in the **Current View** gallery, click the **List** button to display the final standard view of your contact records. Notice that the contact records are currently grouped by company.

	FULL NAME	JOB TITLE	COMPANY	FILE AS	COUNTRY/REGION	DEPARTMENT	BUSI
	Click here to add a new ...						
▲	Company: Fabrikam, Inc.: 3 item(s)						
	Jill Frank	Sales Associa...	Fabrikam, Inc.	Frank, Jill			
	Dean Halstead	Quality Cont...	Fabrikam, Inc.	Halstead, Dean			
	Ben Miller	Manufacturi...	Fabrikam, Inc.	Miller, Ben			
▲	Company: Wingtip Toys: 2 item(s)						
	Lola Jacobsen	Sales Associa...	Wingtip Toys	Jacobsen, Lola	United States of Am...		(940)
	Sarah Jones	Creative Desi...	Wingtip Toys	Jones, Sarah	United States of Am...		(940)

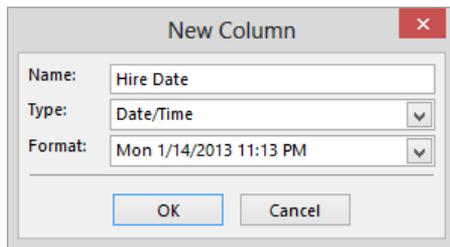
List view displays contact records grouped by whatever field you choose.

**CLEAN UP** Return the People module to the default People view. Retain the Jill Frank, Dean Halstead, Lola Jacobsen, Sarah Jones, and Ben Miller contact records for use in later exercises.

## User-defined fields

If you'd like to save information that doesn't fit into the default contact record fields, you can create a custom field. A custom field can contain information such as text, numbers, percentages, currency, Yes/No answers, dates, times, durations, keywords, and formulas.

You can create a custom information field from any view of the All Fields page of the contact record window by clicking the New button in the lower-left corner of the page and then specifying the name, type, and format of the field in the New Column dialog box that opens.



The image shows a 'New Column' dialog box with the following fields:

- Name: Hire Date
- Type: Date/Time
- Format: Mon 1/14/2013 11:13 PM

Buttons: OK, Cancel

*Custom fields can be formatted to contain many specific types of information.*

Custom fields appear when you filter the All Fields page on User-Defined Fields In Folder. When you enter information in the custom field for a specific contact, it also appears in the User-Defined Fields In This Item list within that contact record.

# Printing contact records

You can print an address book or individual contact records, either on paper or to an electronic file (such as a PDF file or an XPS file), from any address book view. Depending on the view, Outlook offers a variety of print styles, such as those described in the following table.

<b>Style</b>	<b>Description</b>	<b>Available in these views</b>
Card	Contact information displayed alphabetically in two columns. Letter graphics appear at the top of each page and the beginning of each letter group.	Business Card, Card, People
Small Booklet	Contact information displayed alphabetically in one column. Formatted to print eight numbered pages per sheet. Letter graphics appear at the top of each page and the beginning of each letter group, and a contact index at the side of each page indicates the position of that page's entries in the alphabet.	Business Card, Card, People
Medium Booklet	Contact information displayed alphabetically in one column. Formatted to print four numbered pages per sheet. Letter graphics appear at the top of each page and the beginning of each letter group, and a contact index at the side of each page indicates the position of that page's entries in the alphabet.	Business Card, Card, People
Memo	Contact information displayed under a memo-like header that contains your name. One record per sheet.	Business Card, Card, People
Phone Directory	Contact names and phone numbers displayed in two columns. Letter graphics appear at the top of each page and the beginning of each letter group.	Business Card, Card, People
Table	Contact information displayed in a table that matches the on-screen layout.	Phone, List

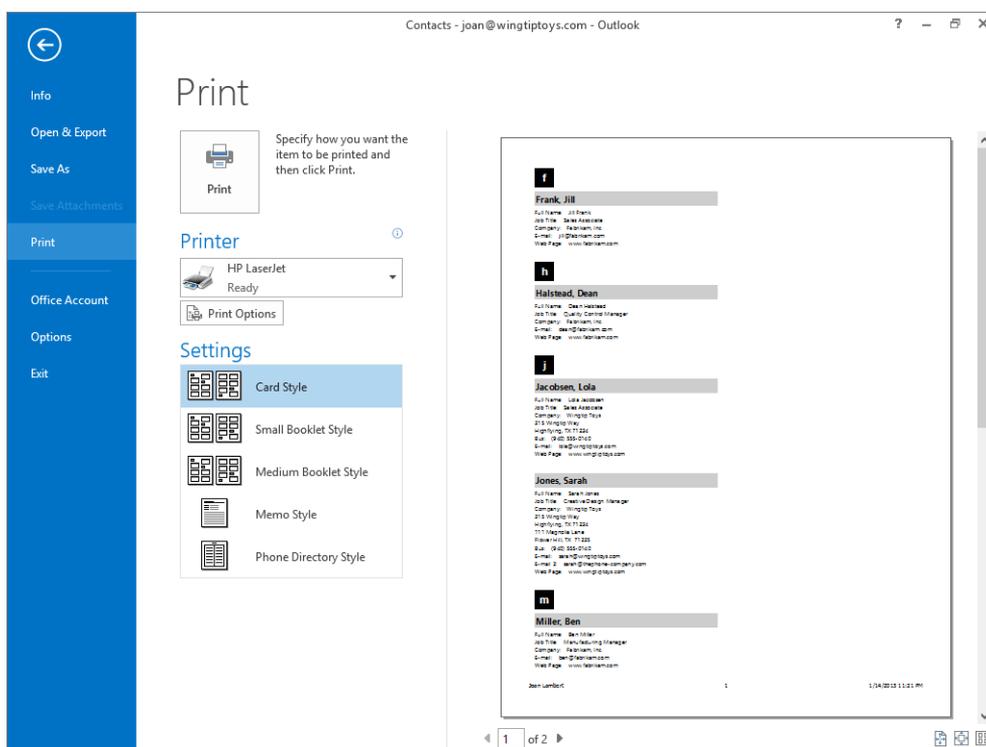
You can customize the layout of most of the default print styles, in addition to saving custom print styles.

In this exercise, you'll set up Outlook to print a phone list and then to print individual address cards.

**→ SET UP** This exercise uses the contact records you created in the exercise “Saving and updating contact information,” earlier in this chapter. If you didn't complete that exercise, you can do so at this time or use contact records of your own. Display the People module in Card view, and then follow the steps.

**IMPORTANT** To fully complete this exercise, you must have a printer installed. If you don't have a printer installed, you can perform all the steps of the exercise other than printing.

1 Display the **Print** page of the **Backstage** view.

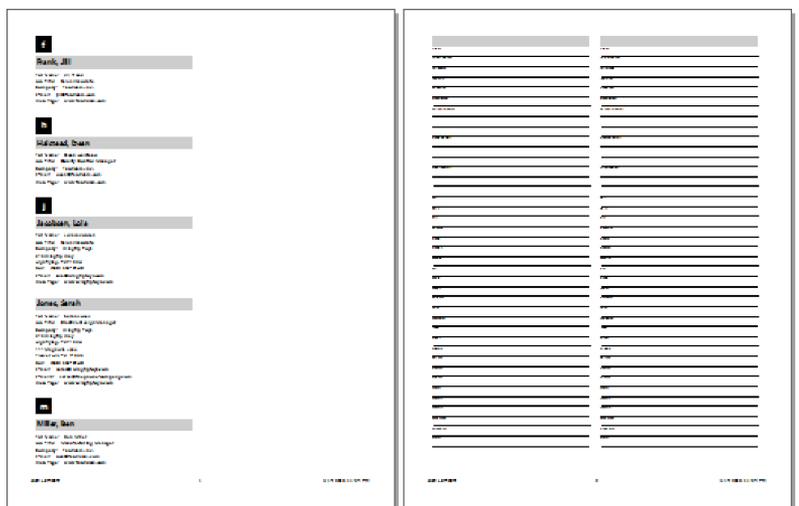


*In Card view, many print styles are available in the Settings list.*

**TIP** The Backstage view on your computer reflects your individual printer settings and might display other print options than those shown here.

The preview pane displays the way the cards will appear if printed in the default Card Style, with the current settings. The page indicators at the bottom of the preview pane indicate that the cards will be printed on two pages.

- 2 In the lower-right corner of the preview pane, click the **Multiple Pages** button to display both pages in the preview pane. The second page contains a series of lines and illegible text.



◀ 1 of 2 ▶

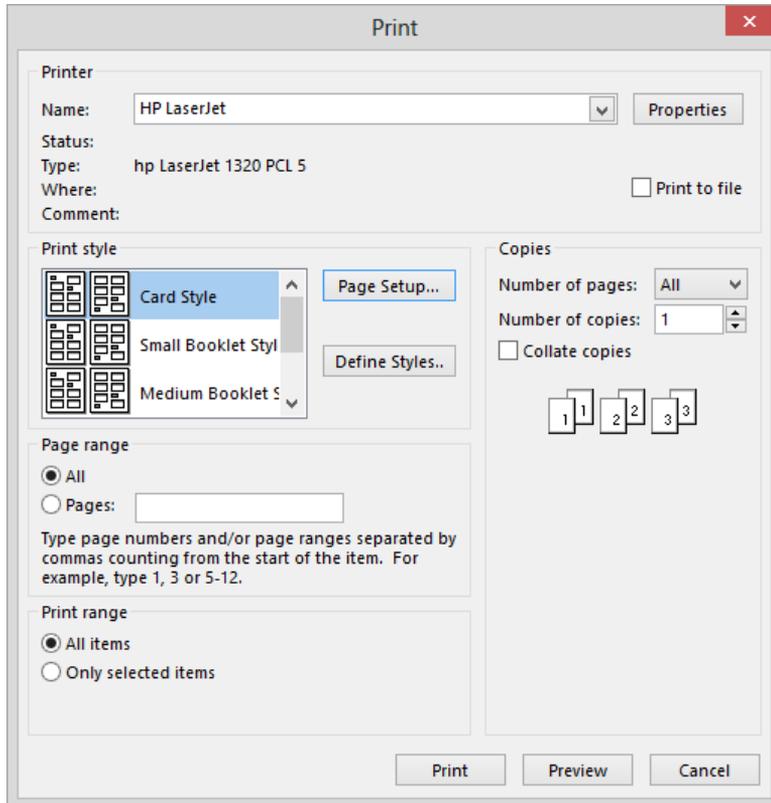


Multiple Pages

*The second page of the Card Style printout provides space for you to enter additional contact information.*

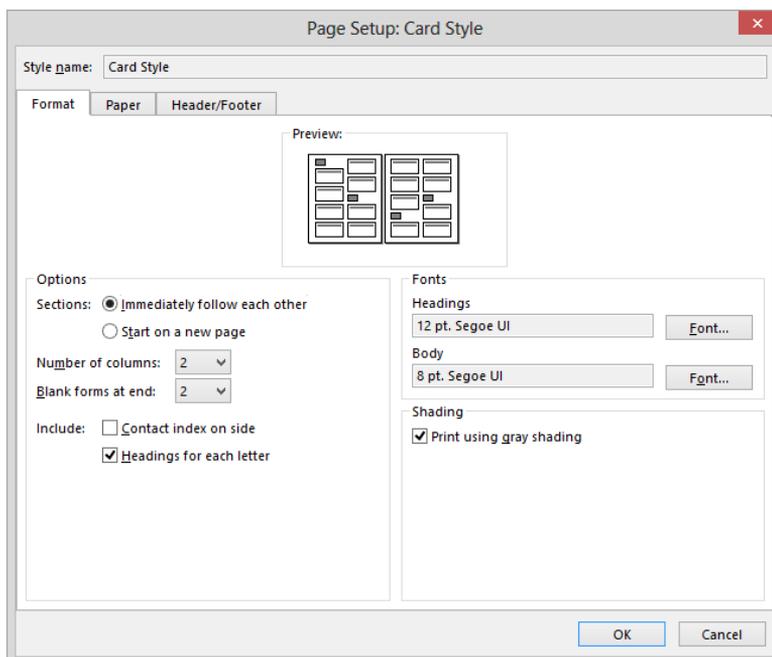
- 3 In the lower-right corner of the preview pane, click the **Actual Size** button to display a full-size version of the document in the preview pane. The magnified text is large enough to read.
- 4 At the bottom of the preview pane, to the right of the number of pages, click the right arrow to display the second page, which provides an area for you to record information about an additional contact, in the preview pane. Outlook refers to this page of the print style as a *blank page*.

- 5 In the middle pane, click **Print Options** to open the **Print** dialog box and display the options for the **Card Style** print style.



*When printing contact records in the Card Style print style, you can select specific contact records (items) to be printed.*

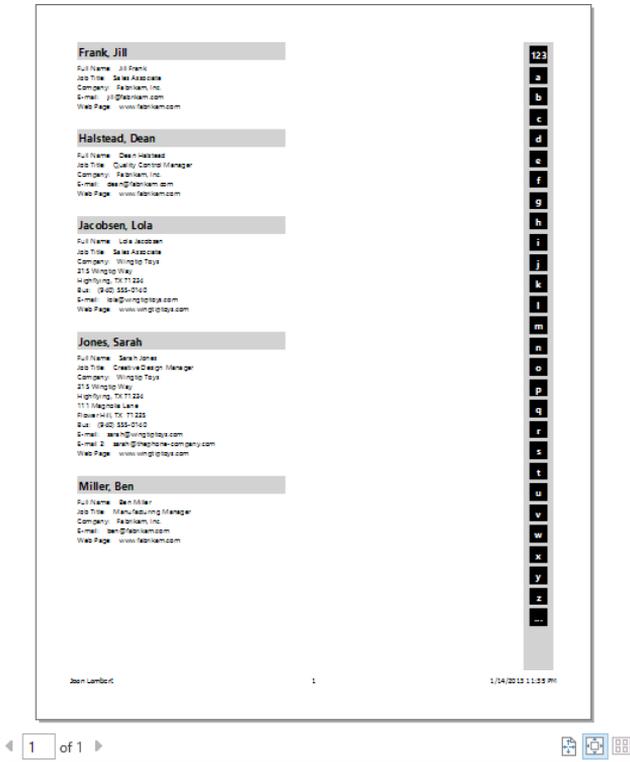
- 6 With **Card Style** selected in the **Print style** box, click **Page Setup** to display the **Format** page of the **Page Setup: Card Style** dialog box.



*The Page Setup dialog box contents vary depending on the selected print style.*

- 7 Review the settings available on each of the dialog box pages. For all print styles, you can change the fonts, paper size, page orientation and margins, header and footer, and other basic settings. For this print style, you can also change the layout of cards on the page, the number of blank forms to be printed, and how the alphabetical division of the cards is indicated.
- 8 In the **Options** area of the **Format** page, click **None** in the **Blank forms at end** list. Select the **Contact index on side** check box, and then clear the **Headings for each letter** check box.
- 9 Click **OK** in the **Page Setup** dialog box, and then click **Preview** in the **Print** dialog box to display in the preview pane the previously selected **Actual Size** view of the card list. Note that it's now only one page.

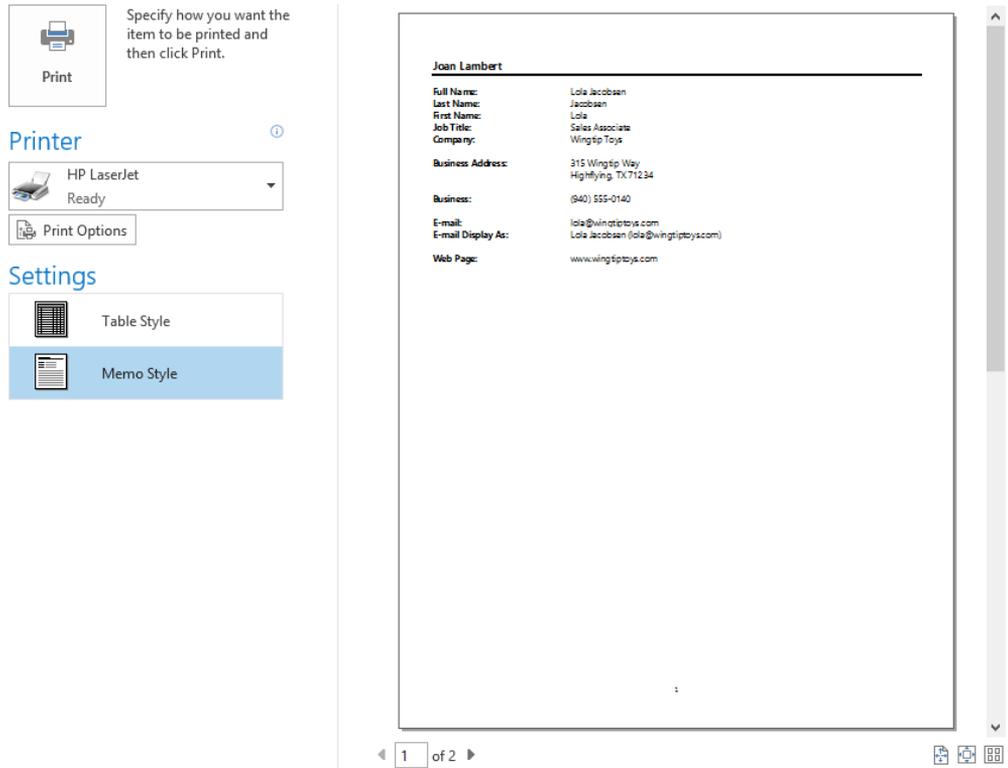
- 10 In the lower-right corner of the preview pane, click the **One Page** button to display in the preview pane the entire card list as it will appear when printed.



*Alphabetical headings no longer precede the contact record cards.*

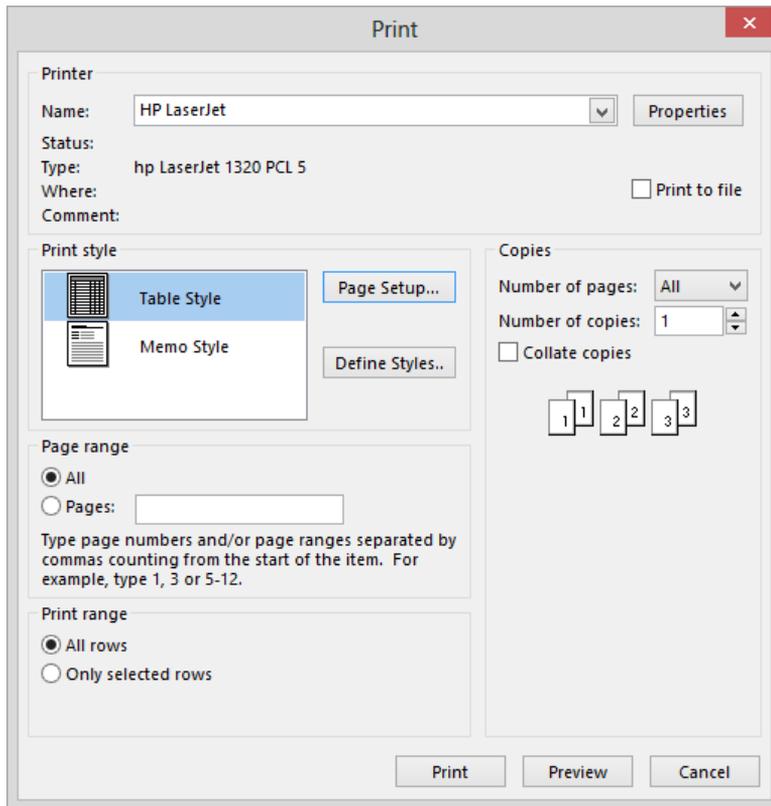
- 11 If you want to print the card list, click the **Print** button. After printing the card list, Outlook returns to the **People** module.
- 12 On the **Home** tab, in the **Current View** gallery, click the **List** button.
- 13 In the contact list, click the **Lola Jacobsen** contact record to select it, press and hold the **Ctrl** key, and then click the **Sarah Jones** contact record to add it to the selection.

- 14 Display the **Print** page of the **Backstage** view. Notice that the **Settings** list displays only two options—**Table Style** and **Memo Style**. **Memo Style** is selected by default.
- 15 If a **Preview** button appears in the preview pane, click it to preview the selected contact records.



*By default, Memo Style prints one contact record per page.*

- 16 In the **Settings** list, click **Table Style**. The preview of **Table Style** indicates that all contact records will be printed rather than only the two you selected.
- 17 In the middle pane, click **Print Options** to open the **Print** dialog box and display the options for the **Table Style**.



*When printing contact records in Table Style, you can select specific items to be printed.*

- 18 In the **Print range** area, click **Only selected rows**. Then click **Preview** to reflect your change.
- 19 If you want to print the selected records, click the **Print** button.
- 20 Experiment with the other ways in which you can print your contact records and your address book.



**CLEAN UP** Return to the default People view or your preferred view of the People module before continuing to the next chapter. Retain the Jill Frank, Dean Halstead, Lola Jacobsen, Sarah Jones, and Ben Miller contact records for use in exercises in later chapters.

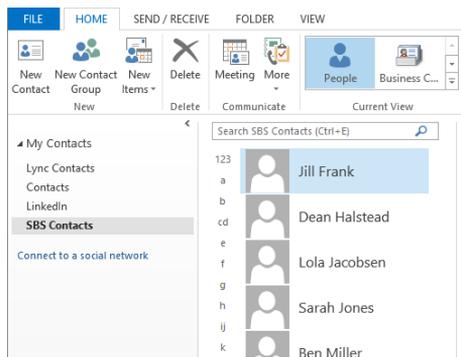
# Key points

- You can create and access different types of address books, including the Global Address List provided by your Exchange Server account, your main address book, and any custom address books that you create.
- Contact records can include names, email and IM addresses, phone numbers, mailing addresses, birthdays, and other information.
- You can display contact records in many different views. In card views, you can move among records by clicking the contact index. In list views, you can sort records by any field.
- You can print your address book or individual contact records in several formats.

# Chapter at a glance

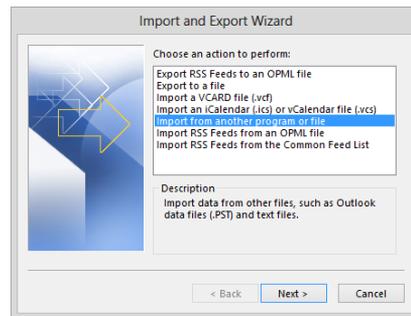
## Create

Create address books,  
page 310



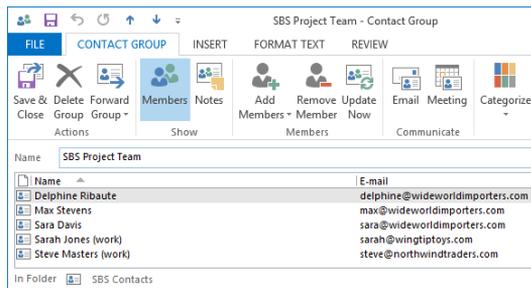
## Import

Import and export contact records,  
page 315



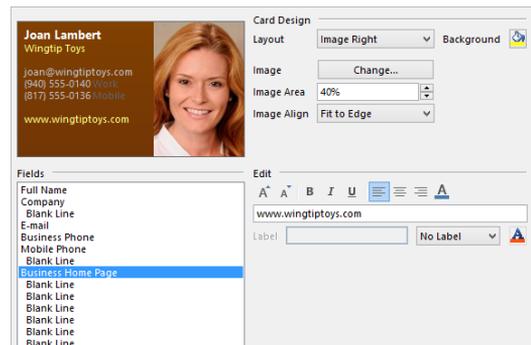
## Group

Create contact groups,  
page 325



## Personalize

Personalize electronic business cards,  
page 337



IN THIS CHAPTER, YOU WILL LEARN HOW TO

- Create address books.
- Import and export contact records.
- Create contact groups.
- Quickly locate contact information.
- Personalize electronic business cards.

If you regularly save contact information for business and personal contacts in Microsoft Outlook, you will quickly accumulate a large collection of contact records. Being able to organize and quickly locate specific contact information is important for efficient communications. The more people you deal with on a daily basis, the more important it is to keep your contact list organized. You can simplify communications with specific groups of people by creating contact groups to which you can address messages as you would an individual contact. You can also create purpose-specific address books and organize contact records within the address books to make it easier to locate specific contact records. You can add contact records to a custom address book either by moving contact records that are already stored in Outlook, or by importing contact records from another program or file.

The Search feature of Outlook 2013 makes it easy to find a specific contact record based on any text within the contact record or any attribute, such as a color category that you assign to it. Within each contact record, you can make preferred contact information easily discoverable by displaying it on the electronic business card version of the contact record. You can also display images, such as photographs or corporate logos on business cards, to provide additional information when you view contacts in the default Business Card view.

In this chapter, you'll first organize the contact records associated with this book into an individual address book. You'll import a fresh set of contact records into the custom address book, and then export a subset of the records. Then you'll create a contact group and send a message to a subset of the group. You'll locate specific contact records by using the Search feature and the commands available on the new Search tool tab. Finally, you'll personalize the content of an electronic business card.

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**PRACTICE FILES** To complete the exercises in this chapter, you need the practice files contained in the Chapter09 practice file folder. For more information, see “Download the practice files” in this book’s Introduction. The exercises in this chapter also use Outlook items you created in exercises in previous chapters. If an exercise requires an item that you don’t have, you can complete the exercise in which you create the item before beginning the current exercise, or you can substitute a similar item of your own.

---

## Creating address books

Outlook displays your default address book when you click the People link or button on the Navigation Bar. The default address book content is stored in a folder named *Contacts*. If you connect to a Microsoft Exchange Server account, the default address book is part of that account, and the information you store in the address book is available on all devices from which you connect to your account. Exchange Server also provides a Global Address List (GAL), which is an address book maintained centrally by your Exchange administrator.

You can track all your contacts—business and personal—within the address book of your default email account. However, you might find it useful to create a separate address book that contains contact records for only a specific group of people. For example, you might want to have an address book that contains only clients, relatives, club members, neighborhood contacts, parents and teachers from your child’s school, or sports teammates.

**TIP** When searching for a specific contact record, you can search a single address book or search all address books within your Outlook configuration, including your organization’s GAL. For more information, see “Quickly locating contact information” later in this chapter.

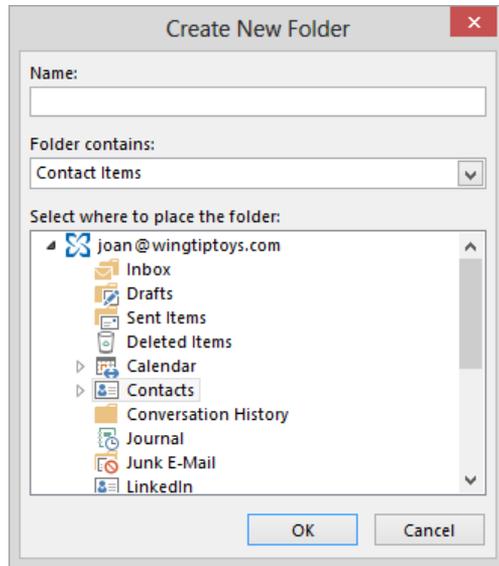
You create an additional address book by creating a folder that has a designated purpose of containing contact items (a *contact folder*). You can move and copy contact records between address books in your Outlook configuration. As with other folders, you can share the contact folder with other Outlook users on your network, or you can export it for distribution to other people. Unlike the Calendar module, in which you can display multiple calendars, the People module can display only one address book at a time. When you have multiple address books, you can switch among them by choosing the address book you want to display from the list in the Folder Pane of the People module or from the Folder List in the Mail module.

**TIP** You can’t display your organization’s GAL from the Folder Pane. To display it, click the Address Book button in the Find group on the Home tab of the People module.

In this exercise, you'll create an address book and move existing contact records into it.

**→ SET UP** You need the contact records you created in Chapter 4 to complete this exercise. If you didn't create those contact records, you may do so now or substitute any contact records of your own. Display the People module, and then follow the steps.

- 1 On the **Folder** tab, in the **New** group, click the **New Folder** button to open the **Create New Folder** dialog box.

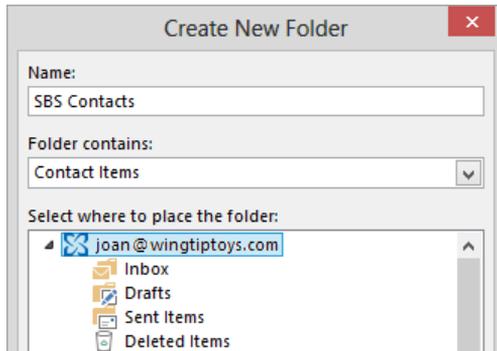


*Because you are creating this folder from within the People module, Contact Items is selected by default. However, you can create any type of folder from within any module.*

- 2 In the **Name** box, enter **SBS Contacts**.

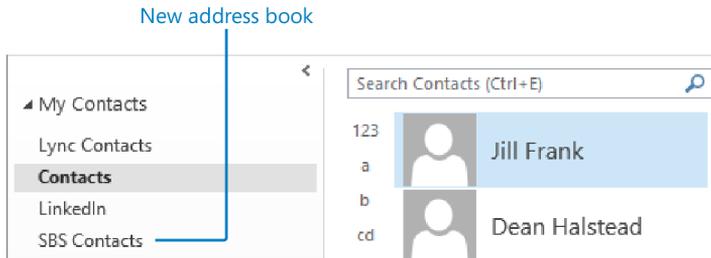
**TIP** The name of this folder begins with **SBS** so that you can easily differentiate it from other folders in your mailbox.

- 3 In the **Select where to place the folder** list, click your account name (or **Mailbox**, depending on your account configuration) to place the new folder at the same level in the **Folder List** structure as your default module folders.



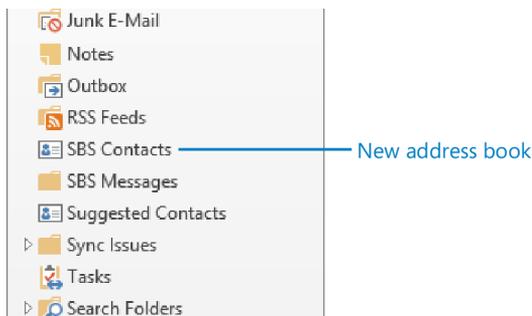
You can create a contact folder anywhere within the existing folder structure.

- 4 In the **Create New Folder** dialog box, click **OK** to create the **SBS Contacts** address book. The address book appears in the **My Contacts** list.



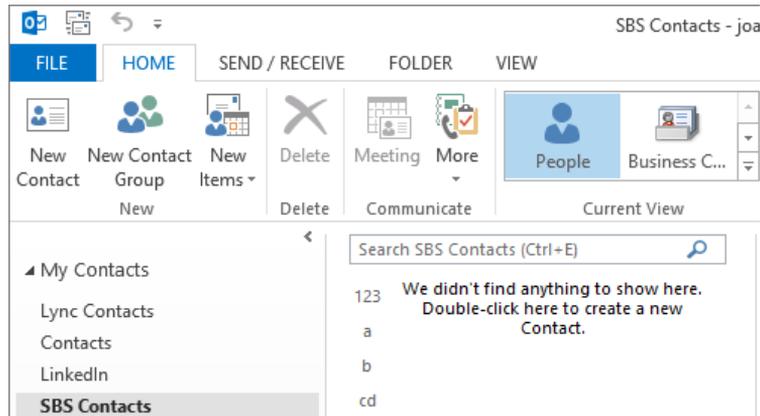
The **Folder Pane** of the **People** module lists all the available contact folders.

- 5 On the **Navigation Bar**, click the **Mail** button to display your **Inbox**. Notice that the **SBS Contacts** folder is not visible in the **Folder Pane**.
- 6 Click the **Folders** button to display the **Folder List**, which includes all the folders in your Outlook configuration rather than only those containing mail items. The **SBS Contacts** folder appears in alphabetic order in the list.



A contact card icon next to the folder name indicates that it is a contact folder, designed to hold contact items.

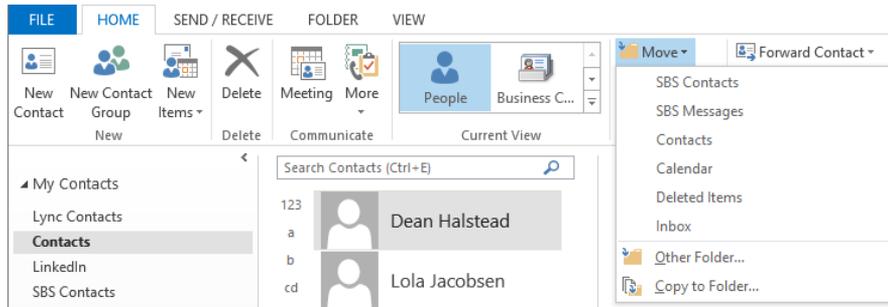
- 7 In the **Folder Pane**, click the **SBS Contacts** folder to display the currently empty address book. Although the **Folder List** still appears in the **Folder Pane**, the ribbon displays the groups appropriate to an address book.
- 8 On the **Navigation Bar**, click the **People** button to display the usual **People** module **Folder Pane**, which provides easy access to your address books.



*The same features available within your main address book, such as the contact index, are available within this custom address book.*

- 9 In the **My Contacts** list, click **Contacts** to display your default address book, which currently contains the five contact records you created in Chapter 4.
- 10 In the contact list, click the **Jill Frank** contact record once to select it.
- 11 Drag the selected contact record from the contact list to the **SBS Contacts** address book in the **Folder Pane**. The record disappears from the contact list.
 

**TIP** To copy rather than move a contact record, right-click and drag the contact record to the destination address book and then, when you release the mouse button, click **Copy** on the shortcut menu.
- 12 In the contact list, if the **Dean Halstead** contact record is not already selected, click it once to select it.
- 13 On the **Home** tab, in the **Actions** group, display the **Move** list.



The Move list includes your custom and standard folders; you can browse to other folders.

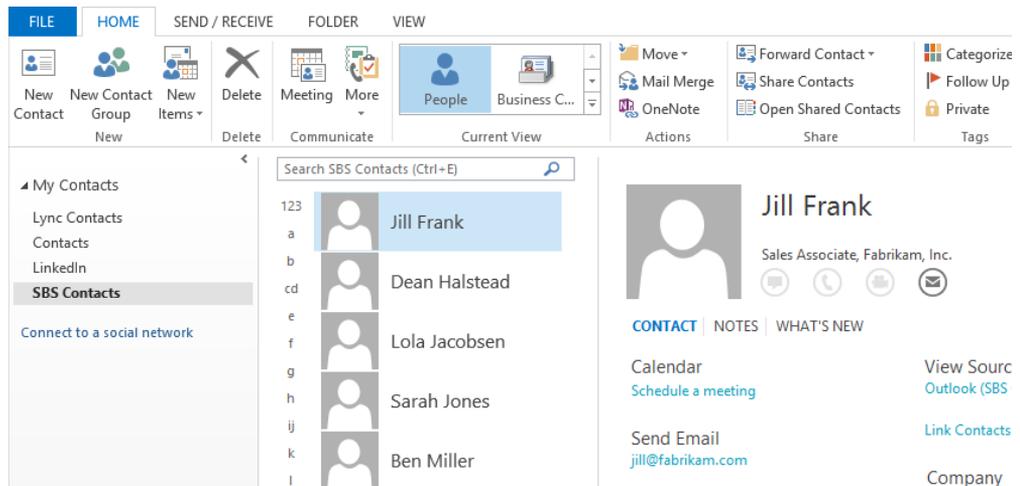
14 In the **Move** list, click **SBS Contacts** to move the selected contact record.

**TIP** If the SBS Contacts folder doesn't appear in your Move list, click **Other Folder** and then select **SBS Contacts** in the Move Items dialog box.

15 In the contact list, click the **Lola Jacobsen** contact record. Press and hold the **Ctrl** key, and then click the **Sarah Jones** and **Ben Miller** contact records in turn to select all the contact records you've created for this book that remain in your main address book.

16 Right-click any one of the selected contact records, click **Move**, and then click **SBS Contacts** to move the contact records.

17 In the **Folder Pane**, click **SBS Contacts** to display the custom address book, which now contains the five records you moved there.



The contact records you've created for this book are now collected in the custom address book.



**CLEAN UP** Retain the SBS Contacts folder and its contents for use in later exercises.

# Importing and exporting contact records

In addition to copying and moving contact records between address books within your Outlook configuration, you can import contact records into an existing address book from external files and programs. Outlook accepts data imported from non-application specific files, files created in other Microsoft programs, and files created in third-party programs.

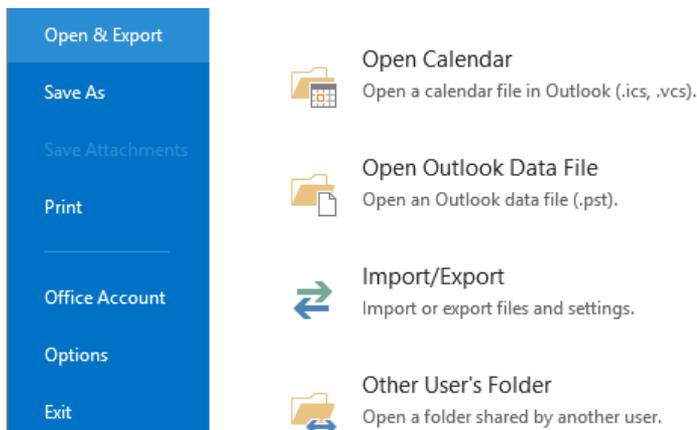
You can import data into Outlook from data files created in Outlook (.pst files) or from plain-text files that contain field values separated by commas (.csv files). Similarly, you can export contact records from Outlook for import into Outlook or another program.

**TIP** In previous versions of Outlook, you could directly import content from many other sources. To import content stored in another source program, export it from that program to a .csv file and then import the .csv file. To import a file that contains contact records into a separate address book, first create the address book, and then import the file.

In this exercise, you'll import contact records from a tab-separated (also referred to as *tab-delimited*) text file into an existing address book. Then you'll export a selection of records from the updated address book to a file that other Outlook users can import, and you'll test that you successfully exported only the records you wanted.

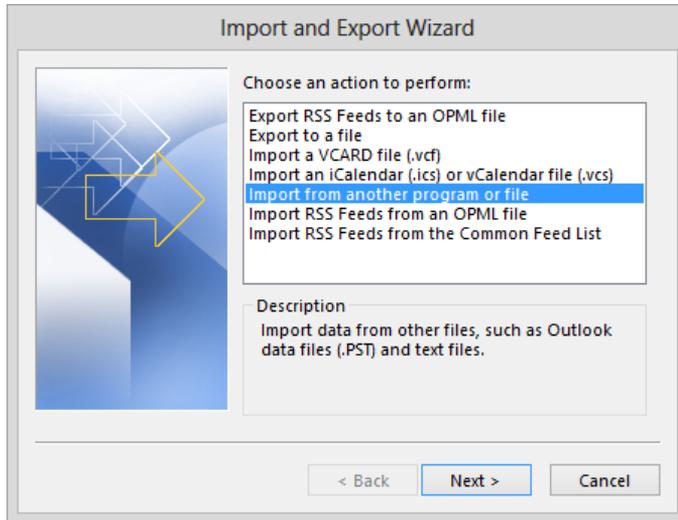
 **SET UP** You need the SBS Contacts address book you created in the previous exercise, and the SBSContacts file located in the Chapter09 practice file folder to complete this exercise. If you didn't create the address book, you may do so now or substitute any existing address book. Display the SBS Contacts address book, and then follow the steps.

1 Display the **Open & Export** page of the **Backstage** view.



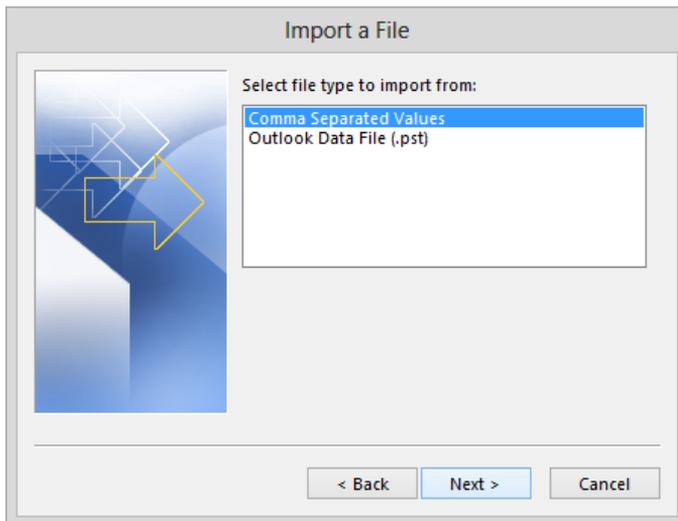
Opening a file creates a link to the external file; importing adds the data to your Outlook folders.

- 2 On the **Open & Export** page, click **Import/Export** to start the **Import and Export** wizard.



*You can export and import specific items or entire RSS feeds.*

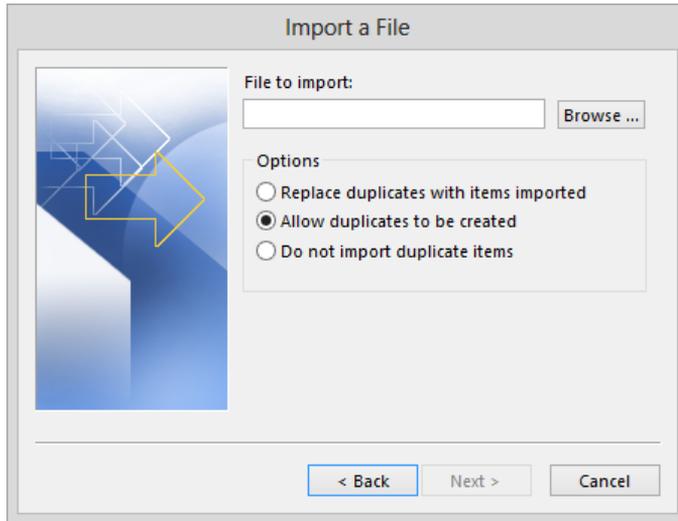
- 3 With **Import from another program or file** selected in the **Choose an action to perform** list, click **Next** to display the list of file types from which you can import content.



*Outlook 2013 accepts data only from .csv and .pst files.*

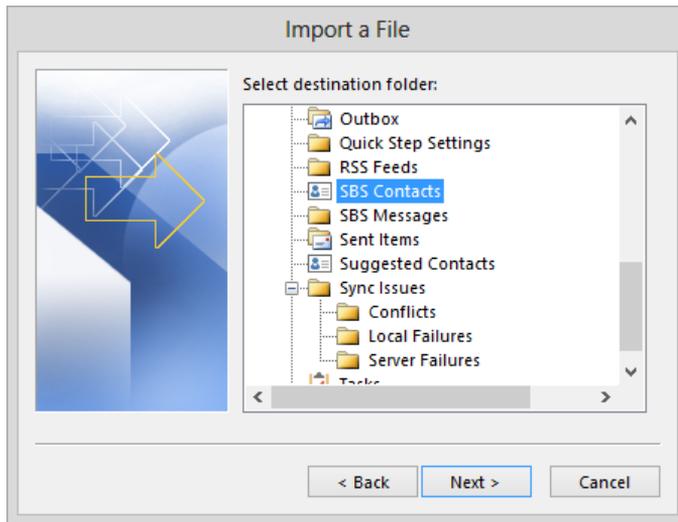
**TIP** Although the name shown in the title bar of the wizard changes to **Import A File**, this page is still part of the **Import And Export** wizard.

- 4 In the **Select file type to import from** list, click **Comma Separated Values**. Then click **Next**.



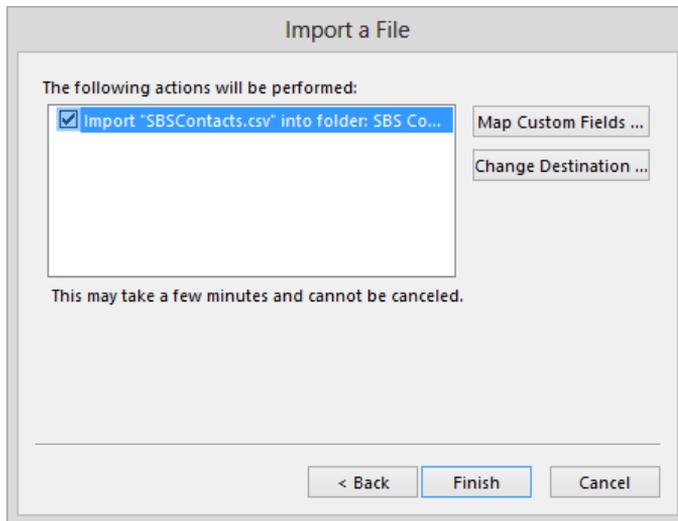
*You can choose whether to allow, refuse, or replace duplicate files.*

- 5 Click the **Browse** button to the right of the **File to import** box to open the **Browse** dialog box. In the **Browse** dialog box, navigate to the **Chapter09** practice file folder, click the **SBSContacts** file, and then click **OK**.
- 6 In the **Options** area, click **Replace duplicates with items imported**. Then click **Next**. Because you started the wizard from the **SBS Contacts** address book, that folder is already selected as the destination folder.



*You can import content into any type of folder.*

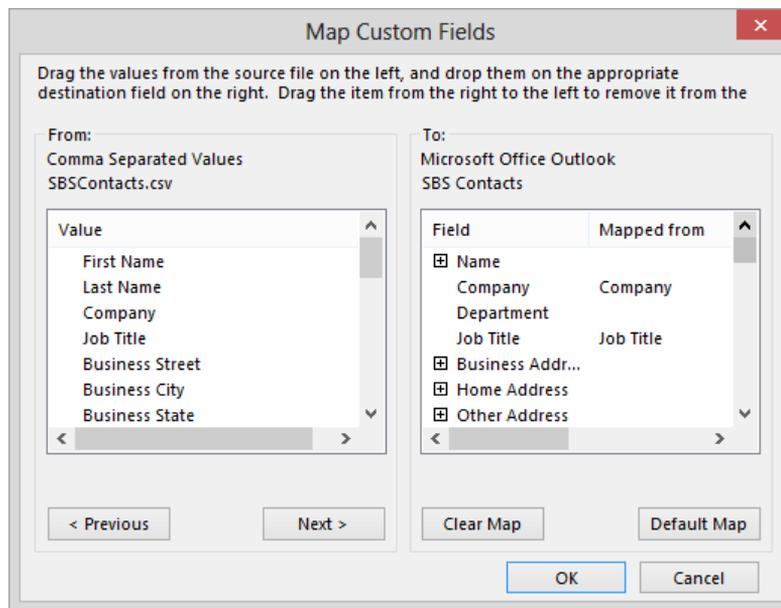
- 7 With **SBS Contacts** selected in the **Select destination folder** list, click **Next**. The wizard displays a description of the import operation and provides additional configuration options.



*You can choose to map custom fields or change the destination of the imported content.*

- 8 On the wizard's last page, click **Map Custom Fields** to open the **Map Custom Fields** dialog box. In this dialog box, you can match named fields from the import source

file to named fields in Outlook. You might need this functionality when you import content from a file that was not originally created in Outlook.



*If the structure of the imported records is different from the Outlook contact record structure, you can match incoming data fields to Outlook data fields before you import the content.*

- 9 Scroll down the **From** list and note the fields that are present in the source file. Then in the area below the **From** list, click **Next** to display in the **Map Custom Fields** dialog box the first record in the source file.
- 10 In the **To** list, click the **Expand** button to the left of **Name** to display all the name fields. The **Mapped From** column displays the value from the current source record that maps to each of the Outlook fields.

**TIP** While testing this functionality, Outlook sometimes displayed the mapping results incorrectly, although the import process worked correctly. We hope that this issue will be resolved in a future software update.
- 11 Click **Next** a few times to view additional records, and scroll the **To** list to review the way the records map to the Outlook fields. Then click **OK** to close the **Map Custom Fields** dialog box.

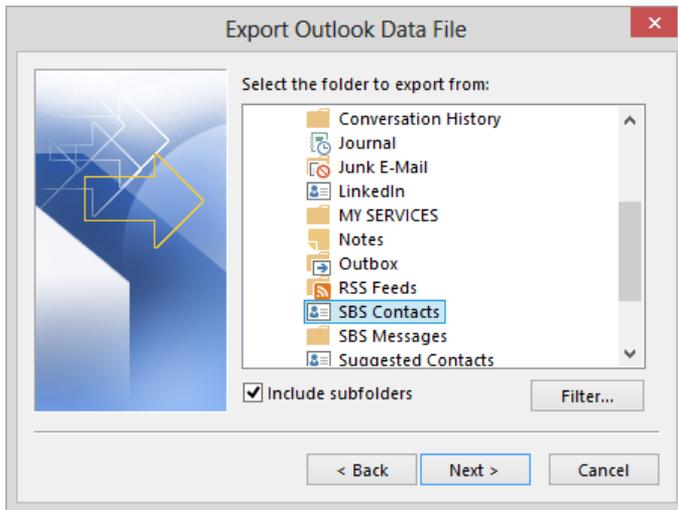
- 12 On the last page of the **Import and Export** wizard, click **Finish** to import the contact records into the **SBS Contacts** address book. In a few seconds, the address book contains 11 contact records.
- 13 On the **Home** tab, in the **Current View** gallery, click **Card** to display information from multiple records. Notice that the five contact records you created earlier in this book now contain additional information. In fact, new versions of these contact records were imported from the **SBSContacts** file. Because in step 6 you selected the option to replace duplicate records, the new records, which contain additional information, replaced the records you created.

<b>Anderson, Nancy</b> Full Name: Nancy Anderson Job Title: Account Manager Company: Northwind Traders Business: 1234 Trinity Street San Diego, CA 98765 Business: (972) 555-0155 E-mail: nancy@northwindtraders.com	<b>Harp, Walter</b> Full Name: Walter Harp Job Title: Accountant Company: Northwind Traders Business: 1234 Trinity Street San Diego, CA 98765 Business: (972) 555-0155 E-mail: walter@northwindtraders.com	<b>Jones, Sarah</b> Full Name: Job Title: Company: Business: Home: Business: Mobile: E-mail: E-mail 2:
<b>Frank, Jill</b> Full Name: Jill Frank Job Title: Sales Associate Company: Fabrikam, Inc. Business: 555 Goa Way Sequim, WA 13579 Business: (425) 555-0188 E-mail: jill@fabrikam.com	<b>Hedlund, Magnus</b> Full Name: Magnus Hedlund Job Title: Warehouse Manager Company: Northwind Traders Business: 1234 Trinity Street San Diego, CA 98765 Business: (972) 555-0155 E-mail: magnus@northwindtraders.com	<b>Lambert, Joan</b> Full Name: Job Title: Company: Business: Business: Mobile:
<b>Halstead, Dean</b> Full Name: Dean Halstead Job Title: Quality Control Manager Company: Fabrikam, Inc. Business: 555 Goa Way Sequim, WA 13579 Business: (425) 555-0188 E-mail: dean@fabrikam.com	<b>Jacobsen, Lola</b> Full Name: Lola Jacobsen Job Title: Sales Associate Company: Wingtip Toys Business: 315 Wingtip Way Highflying, TX 71234 Business: (940) 555-0140 Mobile: (817) 555-0138 E-mail: lola@wingtip toys.com	<b>Masters, Steve</b> Full Name: Job Title: Company: Business:

*Imported and replaced contact records.*

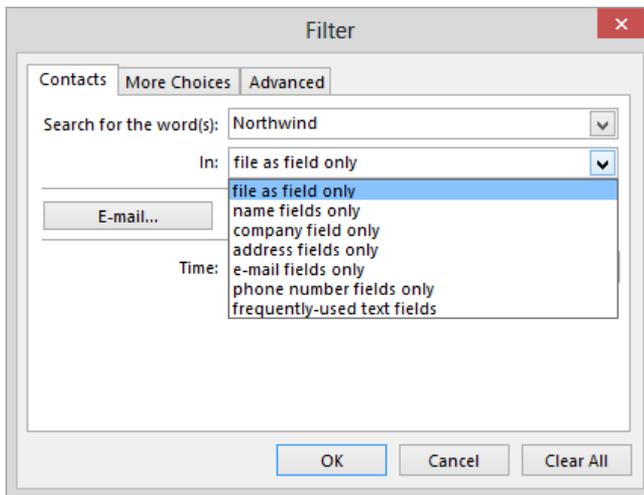
Now you'll export selected records from the updated address book for distribution to other Outlook users.

- 14 On the **Open & Export** page of the **Backstage** view, click **Import/Export** to start the **Import and Export** wizard.
- 15 In the **Choose an action to perform** list, click **Export to a file**, and then click **Next**. As with the import process, in Outlook 2013, you can export only to a .csv or .pst file.
- 16 In the **Create a file of type** list, click **Outlook Data File (.pst)**. Then click **Next**.  
Now we'll select the records to export.



The SBS Contacts folder is selected for export.

- 17 With **SBS Contacts** selected in the **Select the folder to export from** list, click **Filter** to open the **Filter** dialog box. From this dialog box, you can filter the contents of the selected folder so that only items (in this case, contact records) that meet specific criteria are exported.
- 18 On the **Contacts** page of the **Filter** dialog box, enter **Northwind** in the **Search for the word(s)** box. Then click the **In** arrow to display the types of fields on which you can filter contact records.



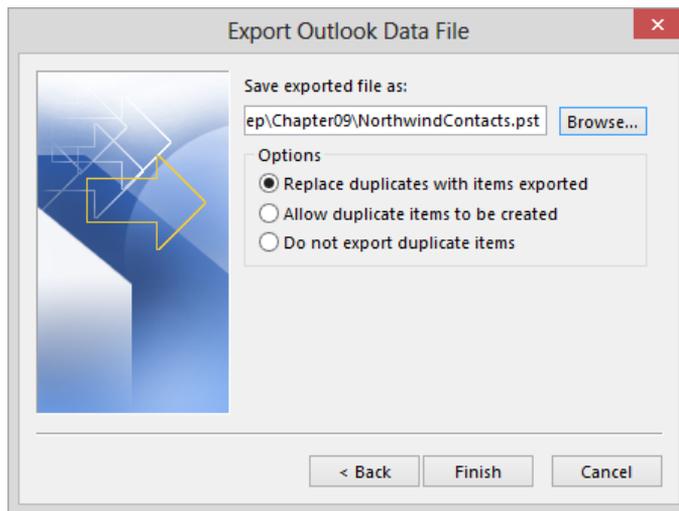
Contact record filtering options.

19 In the **In** list, click **company field only**. Then in the **Filter** dialog box, click **OK**.

20 In the **Export Outlook Data File** wizard, click **Next**.

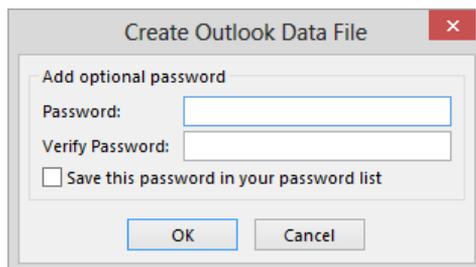
The default settings for the export process save the exported file as *backup.pst* in a subfolder of your user profile named *Outlook Files*. Instead, we will save the file in the practice file folder.

21 To the right of the **Save exported file as** box, click the **Browse** button. In the **Open Outlook Data Files** dialog box, navigate to the **Chapter09** practice file folder. In the **File name** box, enter **NorthwindContacts**. Then click **OK**.



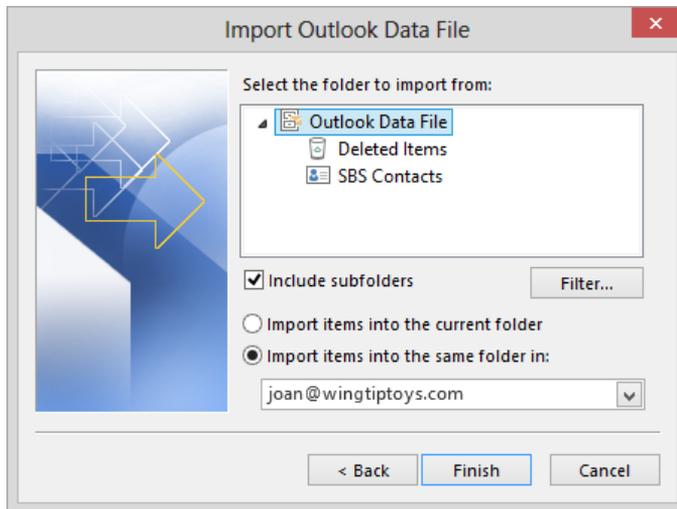
*You can export items to a new or existing .pst file.*

22 On the wizard's last page, click **Finish**. Before exporting the records, Outlook gives you the options to password-protect the file.



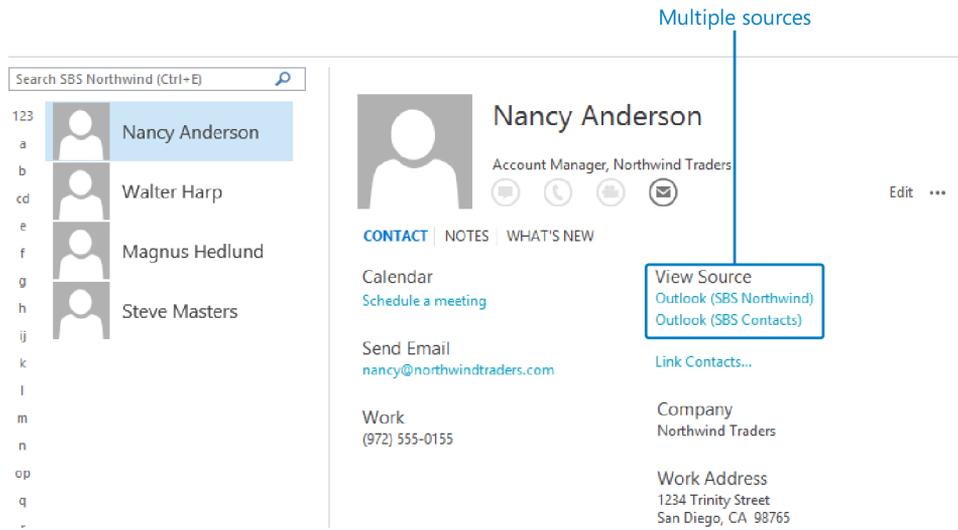
*You can keep the contents of an Outlook data file confidential by assigning a password to the file.*

- 23 In the **Create Outlook Data File** dialog box, click **OK** to create the file without assigning a password.
- 24 To test that you successfully exported the file, use the techniques you learned in this chapter to create a contact folder named **SBS Northwind**, as a subfolder of the **SBS Contacts** address book and import the **NorthwindContacts** data file into it. During the import process, the **Import Outlook Data File** wizard prompts you to select the folder you want to import and the import location.



*Contact record importing options.*

- 25 In the **Select the folder to import from** list, click **SBS Contacts** (the folder from which you exported the data file). Click the **Import items into the current folder** option. Then click **Finish** to import the records from the **NorthwindContacts** data file into the **SBS Northwind** address book.
- 26 After you import the contact records, notice that the **People** cards for each contact display information from multiple sources.



The People cards for Northwind Traders employees display information from both address books.

**TIP** Sources can include Outlook address books and external networks that you connect to, such as LinkedIn and Facebook. Contact records that contain matching information will link automatically; you can manually link or unlink contact records by clicking **Link Contacts**.

Now we'll delete the new address book to avoid confusion in later exercises.

- 27 In the **Folder Pane**, right-click the **SBS Northwind** address book, click **Delete Folder**, and then click **Yes** in the **Microsoft Outlook** dialog box that appears.

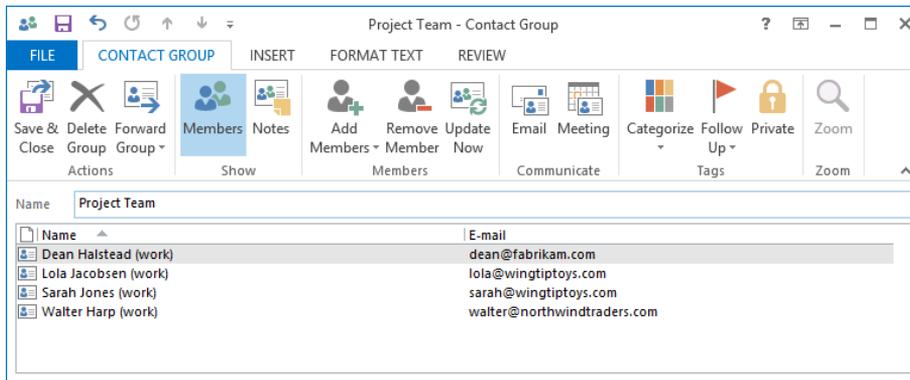
**CLEAN UP** Retain the **SBS Contacts** address book and its contents for use in later exercises.

**TIP** In the preceding exercise, we imported and exported contact records, but you can use the same process to import and export other Outlook items.

# Creating contact groups

If you frequently send messages to specific groups of people, such as members of a project team, club, or family, you can create a contact group that contains all the email addresses. Then you can send a message to all the group members by addressing it to the contact group.

Contact groups are like personal versions of distribution lists. A distribution list is available to everyone on your Exchange Server network; a contact group is available only from the local address book you store it in. You can, however, distribute a contact group to other people for their own use.



*The ribbon provides a separate tab of commands for managing contact groups.*

You add a member to a contact group either by selecting an existing contact record from an address book or by entering contact information in the Add New Member dialog box. When you add a member by using the latter method, you have the option to simultaneously create a contact record for him or her.

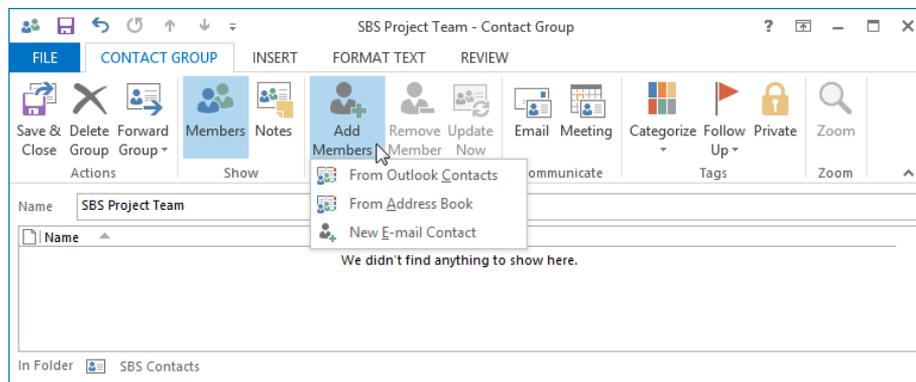
When you send a message to a contact group, each member of the contact group receives a copy of the message. If you want to send a message to most, but not all, members of a contact group, you can expand the contact group in the address field to a full list of its members, and remove individual people for the specific message at the time you send it.

In this exercise, you'll create a contact group and add new contacts to your address book. Then you'll send a message to all but one member of the contact group.



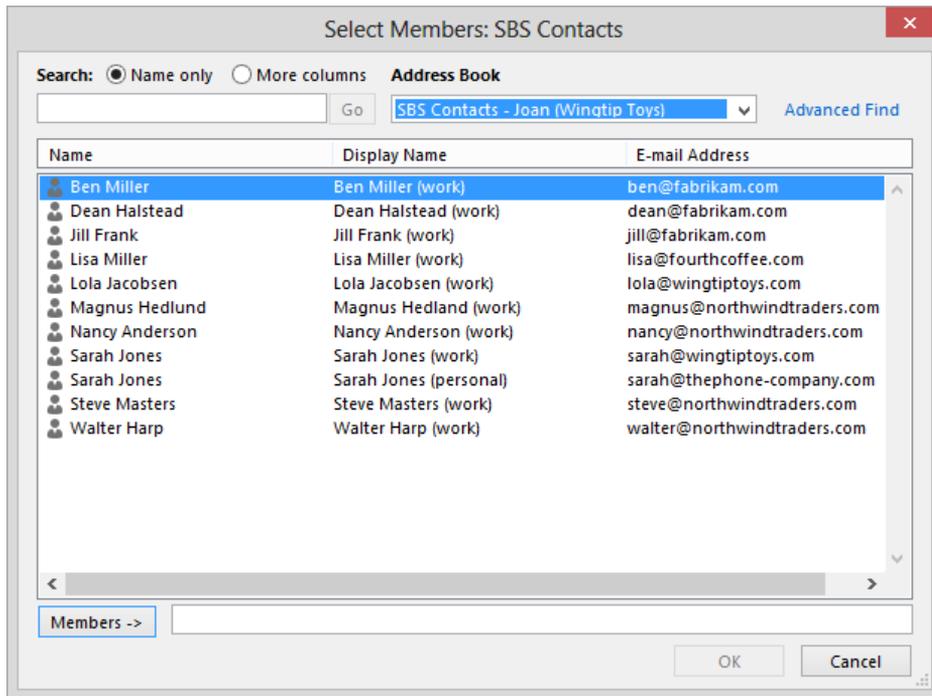
**SET UP** You need the contact records you imported into the SBS Contacts address book in the previous exercise. If you didn't import the contact records, you may do so now or substitute contact records of your own. Display the SBS Contacts address book in List view, and then follow the steps.

- 1 On the **Home** tab, in the **New** group, click the **New Contact Group** button to open the **Contact Group** window.
- 2 In the **Name** box, enter **SBS Project Team**. Then on the **Contact Group** tab, in the **Members** group, click the **Add Members** button to display the locations from which you can add contacts to the contact group.



You can add members to a group from existing records or by entering email addresses.

- 3 In the **Add Members** list, click **From Outlook Contacts** to open the **Select Members** dialog box, which displays the contents of your default **Contacts** address book.
- 4 In the **Address Book** list, click **SBS Contacts** to display the contents of the **SBS Contacts** address book that you created and populated in previous exercises in this chapter.

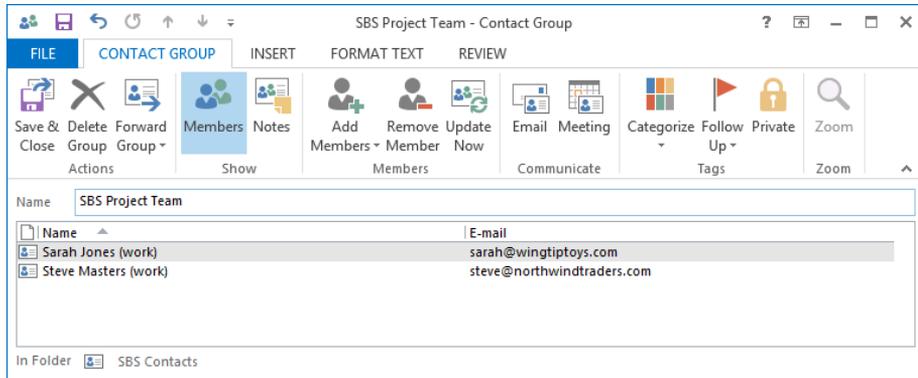


You can search for contacts in the Select Members dialog box by name or by other criteria.

- 5 In the **Name** list, click **Steve Masters**, and then in the lower-left corner of the dialog box, click the **Members** button to display **Steve Masters (work)** in the **Members** box. This is the display name stored in Steve's contact record.
- 6 In the **Name** list, double-click the first **Sarah Jones** entry to add **Sarah Jones (work)** to the **Members** box.

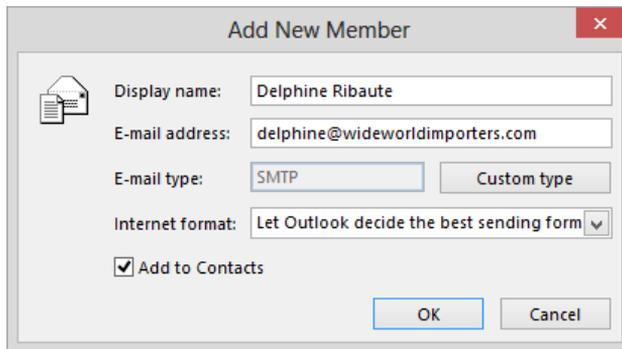
**TIP** You can add individual people, resources, distribution lists, public folders, mail-enabled Microsoft SharePoint site libraries, and other contact groups to a contact group. You can quickly add multiple entries to the Members box by double-clicking each name, or by holding down the Ctrl key while selecting multiple names, and then clicking the Members button.

- 7 In the **Select Members: SBS Contacts** dialog box, click **OK** to add the two contacts to the **SBS Project Team** contact group.



Contact group members added from an address book are listed by the **Display As** names saved in their contact records.

- 8 In the **Add Members** list, click **New E-mail Contact** to open the **Add New Member** dialog box.
- 9 In the **Add New Member** dialog box, enter **Delphine Ribaute** in the **Display name** box and **delphine@wideworldimporters.com** in the **E-mail address** box.



When the **Add To Contacts** check box is selected, the new contact group member will also be added to your default address book.

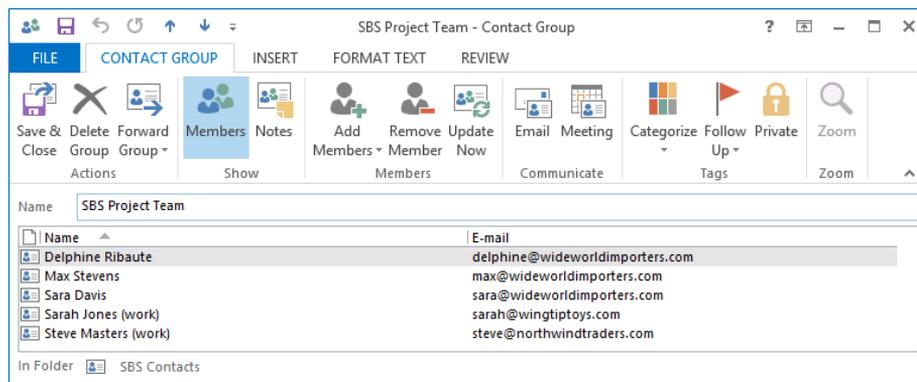
- 10 In the **Add New Member** dialog box, click **OK** to add Delphine to the **SBS Project Team** contact group and to your default address book.

**TIP** We usually keep the contacts you create while working through the exercises in this book separate from your own contacts. For the purpose of the “Quickly locating contact information” exercise later in this chapter, we will create three contact records in your **Contacts** address book and clean them up in the later exercise.

- 11 Repeat steps 8 through 10 to add the following people to the contact group and to your **Contacts** address book:

Display name	Email address
Sara Davis	sara@wideworldimporters.com
Max Stevens	max@wideworldimporters.com

Each new contact group member appears in the contact group in alphabetical order.



The folder in which the contact group is being created is shown in the lower-left corner of the dialog box.

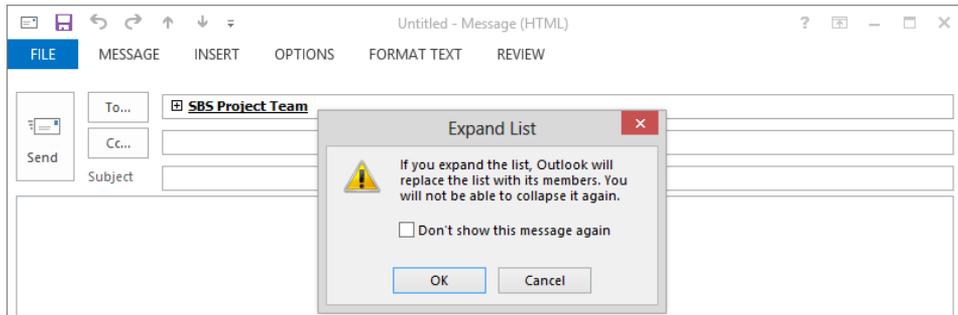
- 12 On the **Contact Group** tab, in the **Actions** group, click the **Save & Close** button to create the contact group in the **SBS Contacts** address book.

Search SBS Contacts (Ctrl+E)							
FULL NAME	JOB TITLE	COMPANY	FILE AS	COUNTRY/REGION	DEPARTMENT	BUSIN	
Click here to add a new ...							
▲ Company: (none): 1 item(s)							
<b>SBS Project Team</b> SBS Project Team							
▲ Company: Fabrikam, Inc.: 3 item(s)							
Jill Frank	Sales Associa...	Fabrikam, Inc.	Frank, Jill	United States of Am...			(425) 5
Dean Halstead	Quality Cont...	Fabrikam, Inc.	Halstead, Dean	United States of Am...			(425) 5
Ben Miller	Manufacturi...	Fabrikam, Inc.	Miller, Ben	United States of Am...			(425) 5
▲ Company: Fourth Coffee: 1 item(s)							
Lisa Miller	Catering Ma...	Fourth Coffee	Miller, Lisa	United States of Am...			(817) 5
▲ Company: Northwind Traders: 4 item(s)							
Nancy Anderson	Account Ma...	Northwind Traders	Anderson, Nancy	United States of Am...			(972) 5
Walter Harp	Accountant	Northwind Traders	Harp, Walter	United States of Am...			(972) 5
Magnus Hedlund	Warehouse ...	Northwind Traders	Hedlund, Magnus	United States of Am...			(972) 5
Steve Masters	Chief Techni...	Northwind Traders	Masters, Steve	United States of Am...			(972) 5
▲ Company: Wingtip Toys: 3 item(s)							
Lola Jacobsen	Sales Associa...	Wingtip Toys	Jacobsen, Lola	United States of Am...			(940) 5
Sarah Jones	Creative Desi...	Wingtip Toys	Jones, Sarah	United States of Am...			(940) 5
Joan Lambert	Chief Toy Tes...	Wingtip Toys	Lambert, Joan	United States of Am...			(940) 5

Contact group names are displayed in bold font so that you can easily differentiate them from individual contact records.

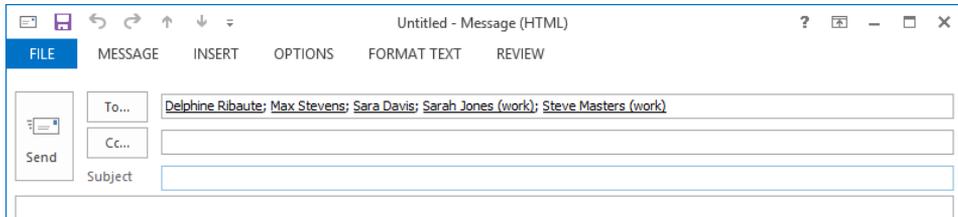
**TIP** The three contact group members you added manually do not appear in this address book; Outlook created their contact records in your default Contacts address book.

- 13 In the contact list, click the **SBS Project Team** contact group. Then on the **Home** tab, in the **Communicate** group, click the **Email** button to open a message composition window. The message is addressed to the **SBS Project Team** contact group.
- 14 In the **To** box, click the **Expand** button to the left of **SBS Project Team**. Outlook displays a warning that you can't collapse the contact group after you expand it.



In a message header, the contact group name is bold and is preceded by an Expand button.

- 15 In the **Expand List** message box, click **OK** to replace the contact group name with the individual names or display names of its members. You can remove any group member from the address box before sending the message.



When you expand the contact group, the names of the group members replace the contact group name.

**TIP** If your organization uses a version of Exchange Server that supports MailTips, the individual message recipient names change to a green font, and a MailTip appears above the To box in the message header, notifying you that the message is addressed to recipients outside of your organization. MailTips are a feature of Exchange Server that displays information in email messages based on centrally stored information about the organization and its individual members.

- 16 Close the message window without saving or sending the message. (The message recipient addresses are fictitious.)

**CLEAN UP** Retain the SBS Project Team contact group and the Delphine Ribaute, Max Stevens, and Sara Davis contact records for use in later exercises.

# Quickly locating contact information

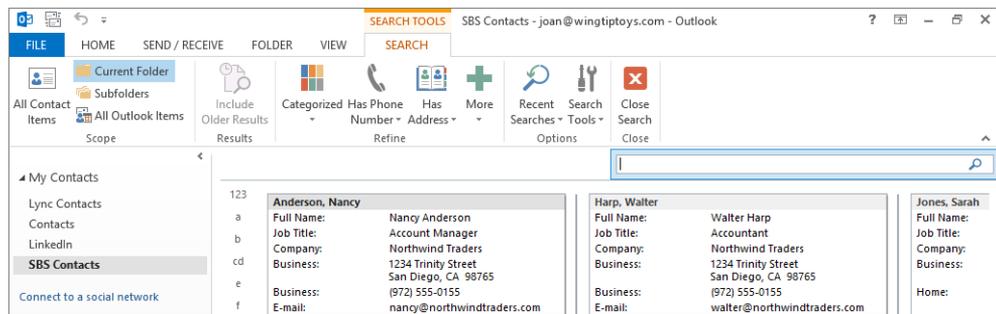
You can use the Search feature in any Outlook module to immediately find a specific Outlook item within the current folder, an item of the same type in any folder, or an item of any type in any folder. Finding an item that contains, for example, a specific word is as simple as entering that word in the Search box at the top of the content area. When you position the cursor in the Search box, the Search tool tab appears on the ribbon. You can refine your search criteria or expand your search to include additional locations by using the commands available on the Search tab.

In this exercise, you'll locate specific contact records, and work with the contact records from the search results.

**→ SET UP** You need the contact records you imported into the SBS Contacts address book earlier in this chapter, and the Delphine Ribaute, Max Stevens, and Sara Davis contact records you created in the previous exercise. If you didn't create those contact records, you may do so now or substitute contact records of your own. Display the SBS Contacts address book in Card view, and then follow the steps.

- 1 At the top of the contact list, click to position the cursor in the **Search** box, and activate the **Search** tool tab on the ribbon.

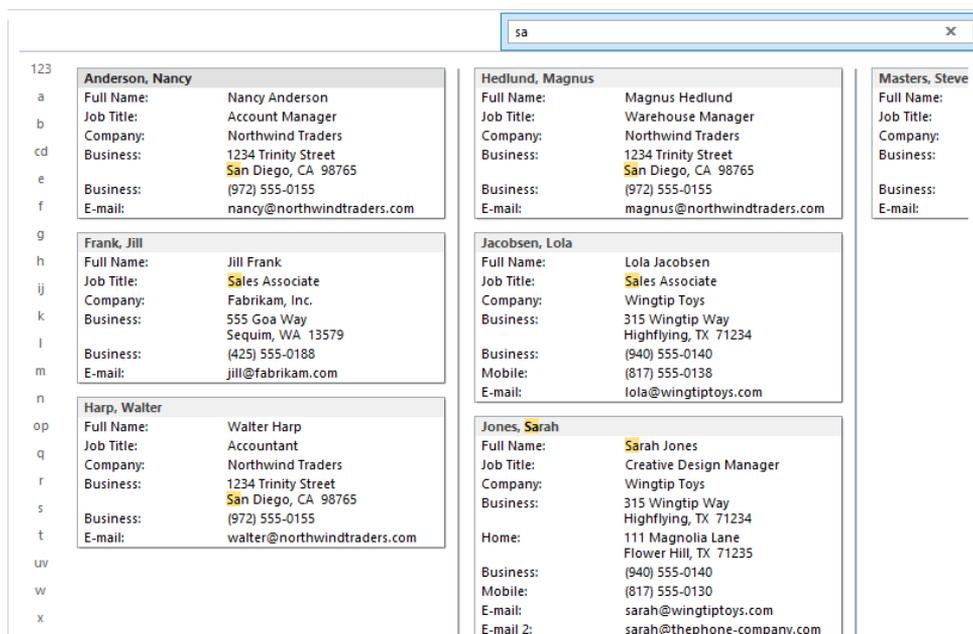
**KEYBOARD SHORTCUT** Press **Ctrl+E** to position the cursor in the Search box of the current module.



*Filters on the People module Search tool tab are specific to information stored in contact records.*

- 2 In the **Search** box, enter **sa**. Notice that as you enter the letters, Outlook filters the list to display only those contact records that contain the letters you've entered, and highlights the matches in the contact records. This highlighting appears in any view other than **Business Card** view.

**TROUBLESHOOTING** If Outlook doesn't automatically filter the contact records, press Enter or click the Search button after you enter the search term.



*Outlook locates the letters at the beginning of any word.*

- 3 In the **Search** box, replace **sa** with **steve**. As you type, Outlook filters the records in the **SBS Contacts** address book to locate **Steve Masters**.

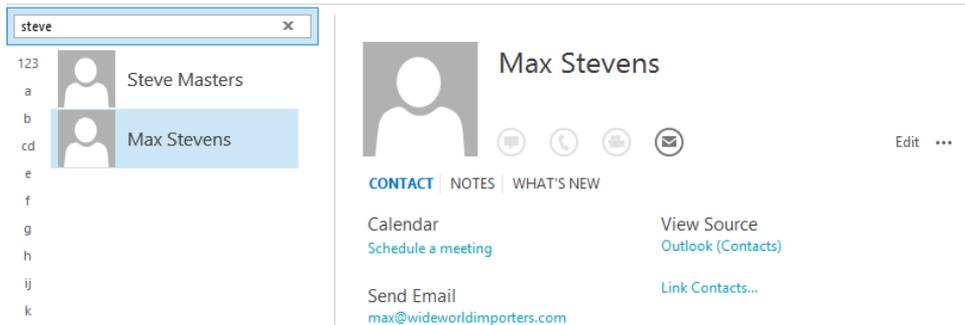
Let's focus our search on Mr. Stevens, who is a member of the SBS Project Team contact group.

- 4 On the **Search** tool tab, in the **Scope** group, click the **All Contact Items** button. The search results expand to display contact information for **Steve Masters** and **Max Stevens**, in addition to any other contacts that meet the criteria. Because we're no longer working specifically in the **SBS Contacts** address book, the view changes to the default **People** view.

- 5 In the contact list, click **Max Stevens** to preview his information.

Next let's locate a co-worker of Mr. Stevens.

**TIP** You can quickly repeat previous searches by clicking in the Search box to display the Search tool tab, clicking the Recent Searches button in the Options group of the Search tab, and then clicking the criteria of the previous search you want to repeat.



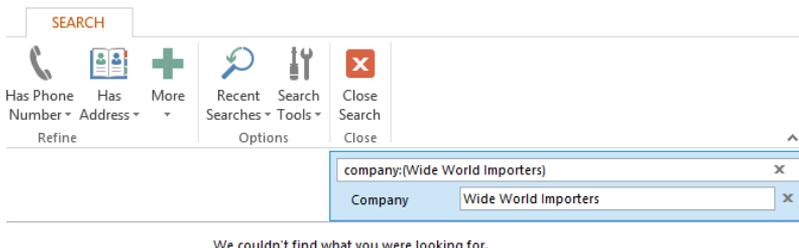
*A refined search.*

- 6 In the **Search** box at the top of the contact list, click the **Close Search** button (the X) to return to the **SBS Contacts** address book.

**TIP** You can also cancel the current search by clicking the **Close Search** button on the **Search** tool tab.

- 7 Click in the **Search** box, and then on the **Search** tool tab, in the **Refine** group, click the **More** button. In the list, click **Company** to display a **Company** box in the **Search** pane.

- 8 In the **Company** box, enter **Wide World Importers**. As you enter the company name, Outlook populates the **Search** box with the correct criteria for the search.

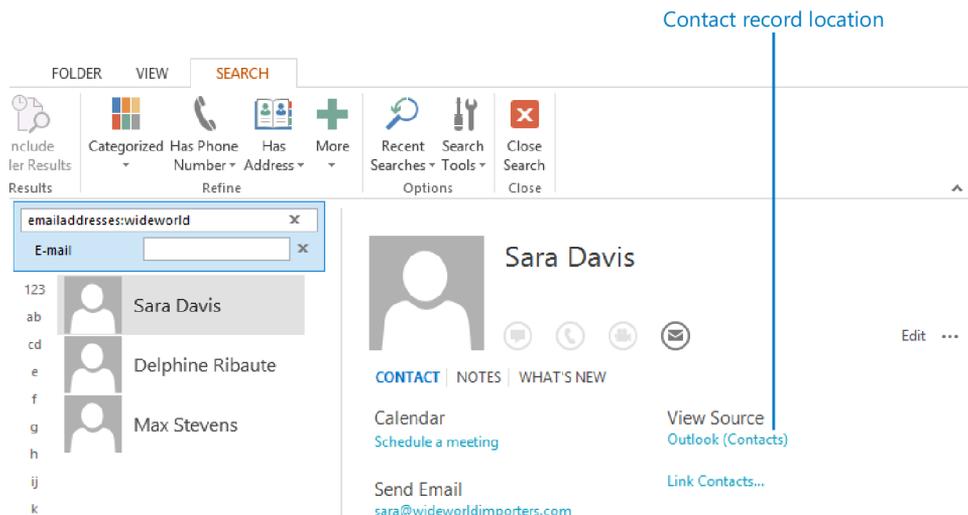


*When a single search criterion includes multiple words, Outlook encloses the words in parentheses.*

The search returns no results because no contact records containing that phrase exist in this address book. You added the contacts from Wide World Importers to the address book when you created the SBS Project Team contact group, and the contact group entries included only the first name, last name, and email address for each person.

- 9 Click the **Remove** button to the right of the **Company** box to remove the corresponding criterion from the **Search** box.

- 10 In the **Refine** group, click the **More** button and then, in the list, click **E-mail** to display an **E-mail** box in the **Search** pane.
- 11 In the **E-mail** box, enter **wideworldimporters** to enter the corresponding search criterion in the **Search** box. Your search still yields no matching contact records because Outlook creates contact records in your default address book when adding people by email address to a contact group; you are currently searching the **SBS Contacts** address book.
- 12 On the **Search** tab, in the **Scope** group, click the **All Contact Items** button to locate the three contact records you created in the previous exercise. In the **Reading Pane**, the source is specified as your **Contacts** address book.



*Email address is one of the criteria by which you can conduct a search.*

- 13 In the contact list, click any one of the three contact records, and then press **Ctrl+A** to select all three. Drag the selected contact records from the contact list to the **SBS Contacts** address book in the **Folder Pane**.
- 14 In the **Folder Pane**, click the **Contacts** address book and verify that the three contact records are no longer there.
- 15 Click the **SBS Contacts** address book. On the **Home** tab, in the **Current View** gallery, click the **List** thumbnail. Confirm that the contact records for **Sara Davis**, **Delphine Ribaute**, and **Max Stevens** are now stored in this address book with the other contact records and the contact group that you have created while working through this book.

	FULL NAME	JOB TITLE	COMPANY	FILE AS
Click here to add a new ...				
Company: (none): 4 item(s)				
	Sara Davis			Davis, Sara
	Delphine Ribaute			Ribaute, Delphine
	SBS Project Team			SBS Project Team
	Max Stevens			Stevens, Max
Company: Fabrikam, Inc.: 3 item(s)				
	Jill Frank	Sales Associa...	Fabrikam, Inc.	Frank, Jill
	Dean Halstead	Quality Cont...	Fabrikam, Inc.	Halstead, Dean
	Ben Miller	Manufacturi...	Fabrikam, Inc.	Miller, Ben
Company: Fourth Coffee: 1 item(s)				
	Lisa Miller	Catering Ma...	Fourth Coffee	Miller, Lisa
Company: Northwind Traders: 4 item(s)				
	Nancy Anderson	Account Ma...	Northwind Traders	Anderson, Nancy
	Walter Harp	Accountant	Northwind Traders	Harp, Walter
	Magnus Hedlund	Warehouse ...	Northwind Traders	Hedlund, Magnus
	Steve Masters	Chief Techni...	Northwind Traders	Masters, Steve
Company: Wingtip Toys: 3 item(s)				
	Lola Jacobsen	Sales Associa...	Wingtip Toys	Jacobsen, Lola
	Sarah Jones	Creative Desi...	Wingtip Toys	Jones, Sarah
	Joan Lambert	Chief Toy Tes...	Wingtip Toys	Lambert, Joan

The final contents of the SBS Contacts address book.



**CLEAN UP** Click in the Search box to activate the Search pane, and then click the Remove button to the right of the Email box to remove this field from the pane.

## Sending business cards

You can send entire contact records to other Outlook users to add to their address books or, if you prefer to share only the information shown on the associated business card, you can send the business card. To send an Outlook business card:

- 1 In any view of the address book, click the contact record whose business card you want to send.
- 2 On the **Home** tab, in the **Share** group, click the **Forward Contact** button, and then click **As a Business Card** to create a new message that has the business card attached as a file and displayed in the content area. The contact name is displayed in the **Subject** box in the message header.
- 3 Address and send the message.

**TIP** You can include a business card as part or all of your email signature by clicking the **Business Card** button while creating or editing a signature. For information about email signatures, see “Personalizing the appearance of message text” in Chapter 10, “Enhance message content.”

# Personalizing electronic business cards

Within each contact record window, information appears not only in the fields of the contact record but also in the form of a graphic that resembles a business card. When you enter a person's contact information in a contact record, basic information appears in the business card shown in the upper-right corner of the contact window. This data includes the person's name, company, and job title; work, mobile, and home phone numbers; and email, postal, webpage, and instant messaging addresses. (Only the first 10 lines of information fit on the card.) If an image is associated with the person through Exchange, SharePoint, or a social network to which you've connected Outlook, the contact record includes the image. You can change the types of information that appear, rearrange the information fields, format the text and background, and add, change, or remove images, such as a logo or photograph.

Creating a business card for yourself provides you with an attractive way of presenting your contact information to people you correspond with in email. You can attach your business card to an outgoing email message or include it as part (or all) of your email signature. The recipient of your business card can easily create a contact record for you by saving the business card to his or her Outlook address book.

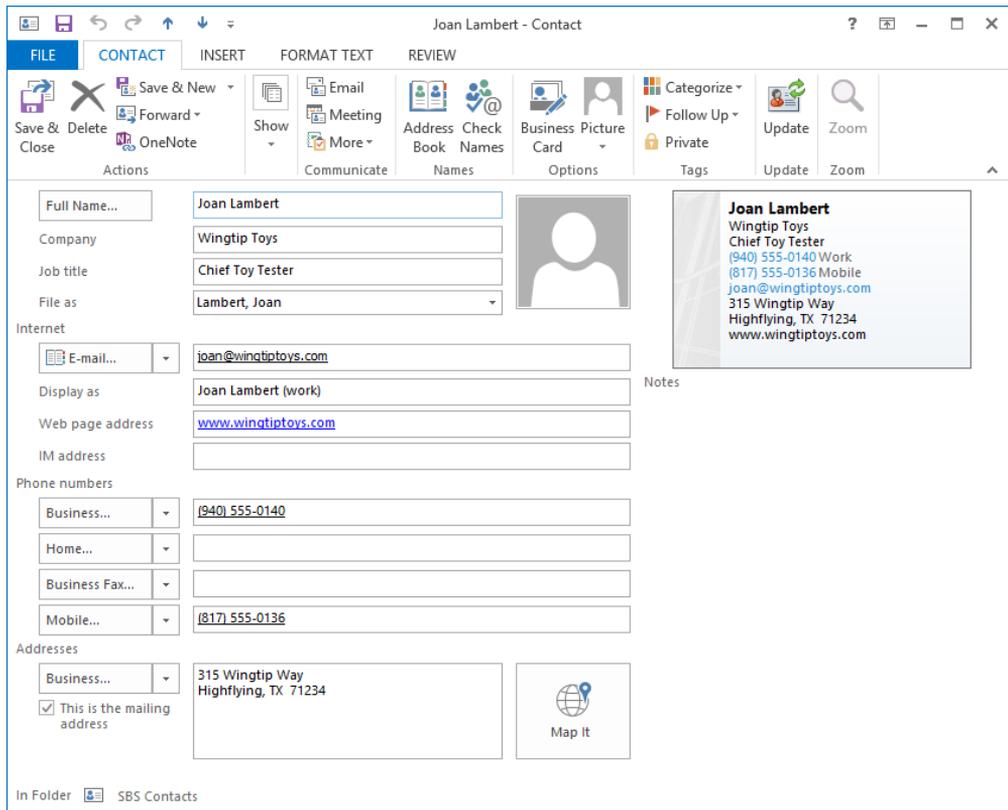
**SEE ALSO** For information about email signatures, see "Personalizing the appearance of message text" in Chapter 10, "Enhance message content."

In this exercise, you'll modify the business card associated with a contact record.



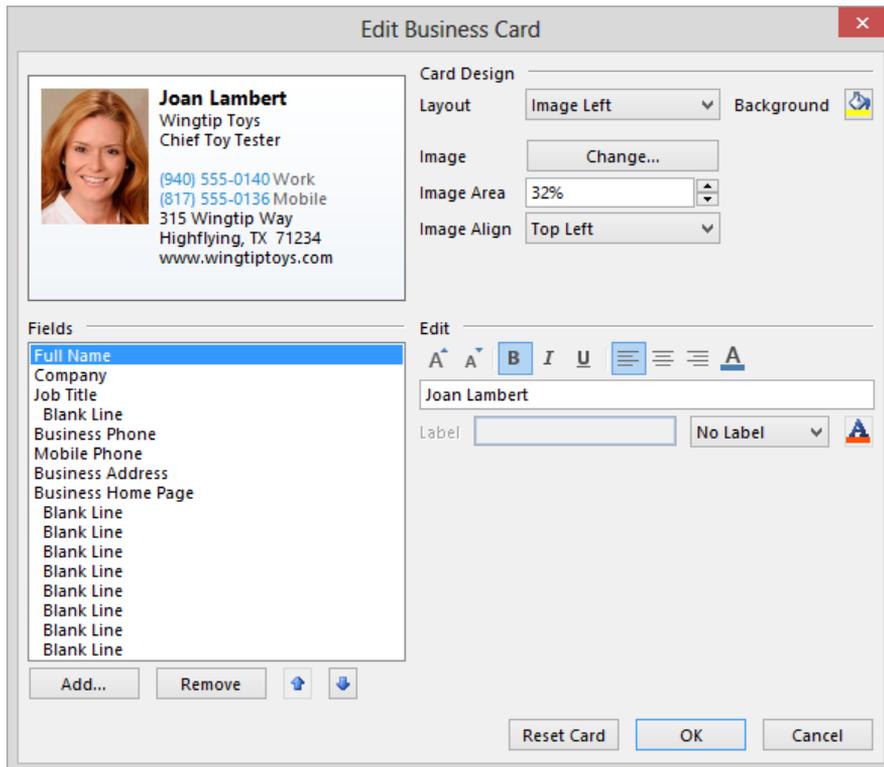
**SET UP** You need the **JoanLambert** image located in the **Chapter09** practice file folder and the **SBS Contacts** address book you created and populated in earlier exercises in this chapter to complete this exercise. Display the **SBS Contacts** address book in **Business Card** view, and then follow the steps.

- 1 In the contact list, double-click the **Joan Lambert** contact record to open the contact record window. The business card in the upper-right corner displays information stored in the contact record fields. The grayscale graphic on the left side of the business card is a placeholder image.



*The default business card displays the information stored in the contact record.*

- 2 On the **Contact** tab, in the **Options** group, click the **Picture** button, and then click **Add Picture**. The **Add Contact Picture** dialog box opens, displaying the contents of your **Pictures** library. You can add a business logo, your photograph, or any other image to a business card.
- 3 In the **Add Contact Picture** dialog box, navigate to the **Chapter09** practice file folder, click the **JoanLambert** image, and then click **OK** to replace the image placeholder in the contact record window and business card with the photo of Joan. Notice that the space allocated to the image changes and the content moves to the right.
- 4 In the **Options** group, click **Business Card** to open the **Edit Business Card** dialog box, in which you can modify the contents of the business card.

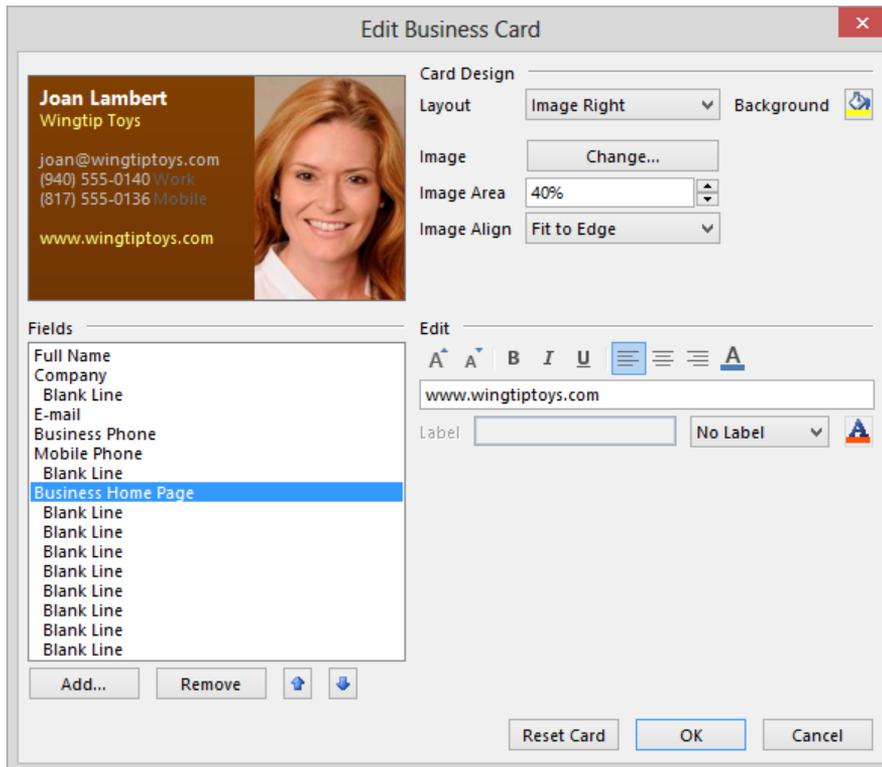


*The default placement of an image on an electronic business card is to the left of the contact information.*

- 5 In the **Card Design** area, in the **Layout** list, click **Image Right** to move the photo from the left side of the card to the right side.
- 6 In the **Image Area** box, enter or select (by clicking the arrows) **40%** to dedicate that horizontal portion of the card to the image.
- 7 In the **Image Align** list, click **Fit to Edge** to expand the photo to the full height of the business card.
- 8 In the **Card Design** area, click the **Background Color** button to open the **Color** dialog box. In the fifth row of the **Basic colors** palette, click the second swatch to select a brown color that coordinates with colors in the image.

- 9 In the **Color** dialog box, click **OK** to apply the new background color to the card preview. Notice that some of the text on the card might be difficult to read against the dark background.
- 10 With **Full Name** selected in the **Fields** list, click the **Font Color** button at the top of the **Edit** area (not the button associated with the **Label** field). In the **Color** dialog box, in the lower-right corner of the **Basic colors** palette, click the white swatch. Then click **OK**. The name on the business card now stands out from the background color.
- 11 In the **Fields** list, click **Company**, and then change the color of the company name shown on the business card from black to light yellow (the second swatch in the top row of the **Basic colors** palette).
- 12 In the **Fields** list, click **Job Title**. Then below the **Fields** list, click **Remove** to remove the job title from the business card (but not from the contact record).
- 13 In the **Fields** list, click the first **Blank Line** entry. Below the **Fields** list, click the **Move Field Up** button five times (pausing between clicks) to position a blank line after the company name.
- 14 In the **Fields** list, click **E-mail**. Then click the **Move Field Up** button two times to position the email address before the phone numbers.
- 15 Use the techniques you learned in this exercise to do the following:
  - Remove the **Business Address** field from the business card.
  - Insert a blank line between the **Mobile Phone** and **Business Home Page** fields.
  - Change the color of the **E-mail**, **Business Phone**, and **Mobile Phone** information to light gray (the third swatch from the right in the last row) and the **Business Home Page** information to light yellow.

After completing these changes, the business card looks very different from the original.



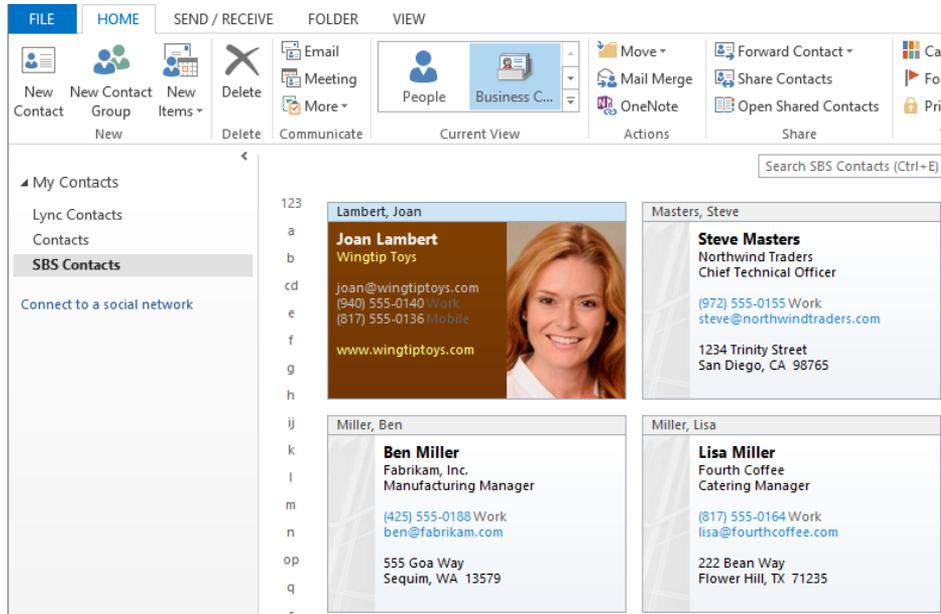
You can easily modify the layout and formatting of an electronic business card.

**TIP** You can modify field labels by clicking the field and then changing the label text, position, and color in the Label area to the right of the Fields list.

16 In the **Edit Business Card** dialog box, click **OK** to display the customized business card in the contact record window.

**TIP** You can undo all the changes you've made to a business card by clicking the **Reset Card** button at the bottom of the Edit Business Card dialog box.

- 17 On the **Contact** tab, in the **Actions** group, click the **Save & Close** button to display the personalized business card among the default business cards in the address book.



*A personalized business card stands out from other contact records.*



**CLEAN UP** Retain the SBS Contacts address book and its contents for use in exercises in later chapters.

## Key points

- To more specifically organize contact records, you can create separate address books.
- You can import information into an Outlook address book from many external sources, and export information to share with other people who are using other programs.
- Creating and making use of contact groups saves time if you frequently send messages to a specific group of people.
- The Search feature makes short work of locating a specific contact or item of information in a contact record.
- You can customize the information shown in the electronic business card for each contact record, including your own.

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# About the authors

## Joan Lambert



Joan has worked in the training and certification industry for 16 years. As President of Online Training Solutions, Inc. (OTSI), Joan is responsible for guiding the translation of technical information and requirements into useful, relevant, and measurable training and certification tools.

Joan is a Microsoft Office Certified Master, Microsoft Certified Application Specialist Instructor, Microsoft Certified Technology Specialist, Microsoft Technology Associate, Microsoft Certified Trainer, and the author of more than two dozen books about Windows and Office (for Windows and Mac). Joan enthusiastically shares her love of technology through her participation in the creation of books, learning materials, and certification exams. She greatly enjoys communicating the benefits of new technologies by delivering training and facilitating Microsoft Experience Center events.

Joan currently lives in a nearly perfect small town in Texas with her simply divine daughter, Trinity, slightly naughty dog, naturally superior cat, and the super-automatic espresso machine that runs the house.

## Joyce Cox



Joyce has more than 30 years' experience in the development of training materials about technical subjects for non-technical audiences, and is the author of dozens of books about Office and Windows technologies. She is the Vice President of OTSI.

As President of and principal author for Online Press, she developed the Quick Course series of computer training books for beginning and intermediate adult learners. She was also the first managing editor of Microsoft Press, an editor for Sybex, and an editor for the University of California.

# The team

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## Online Training Solutions, Inc. (OTSI)

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